

FAREHAM

BOROUGH COUNCIL

AGENDA PLANNING COMMITTEE

Date: Friday, 23 July 2021

Time: 9.30 am

Venue: Council Chamber - Civic Offices

Members:

Councillor N J Walker (Chairman)

Councillor I Bastable (Vice-Chairman)

Councillors F Birkett
Miss J Bull
T M Cartwright, MBE
P J Davies
M J Ford, JP
Mrs C L A Hockley
R H Price, JP

Deputies: S Dugan
J S Forrest
Mrs K Mandry
Mrs K K Trott



1. Apologies for Absence

2. Chairman's Announcements

3. Declarations of Interest

To receive any declarations of interest from members in accordance with Standing Orders and the Council's Code of Conduct.

4. Deputations

To receive any deputations of which notice has been lodged.

5. Development Management (Pages 1 - 336)

Planning Application – P/17/0266/OA – WELBORNE LAND NORTH OF FAREHAM.

PROPOSAL: A new community of up to 6000 dwellings (C3 and C2, including a care home of use class C2) together with a district centre (comprising up to 2,800m² food store retail (A1), up to 2,419m² of non-food retail (A1) and up to 2,571m² of other non-convenience/comparison retail use (A1 - A5)); a village centre (comprising up to 400m² food store retail (A1), up to 1,081m² of non- food retail (A1), a public house (up to 390m² A4 use) and up to 339m² of other non-convenience/comparison retail use (A1 - A5)); up to 30,000m² of commercial and employment space (B1); up to 35,000m² of general industrial use (B2); up to 40,000m² of warehousing space (B8); a hotel (up to 1,030m² C1 use); up to 2,480m² of community uses (D1 and D2); up to 2,200m² ancillary nursery (D1), health centre (D1) and veterinary services (D1); retention of Dean Farmhouse; a secondary school, Primary schools; pre-schools; green infrastructure including formal and informal open and amenity space; retention of some existing hedgerows, grassland, woodland areas, allotments, wildlife corridors; all supporting infrastructure; household waste recycling centre; requisite sub-stations; sustainable drainage systems including ponds and water courses; a remodelled M27 J10 including noise barrier(s); works to the A32 including the creation of three highway junctions and new crossing(s); distributor roads (accommodating a Bus Transit network) and connections to the surrounding cycleway and pedestrian network; car parking to support enhanced use of Dashwood; ground remodelling; any necessary demolition; with all matters reserved for future determination with the exception of the works to M27 J10 and the three highway junctions and related works to the A32.



P GRIMWOOD
Chief Executive Officer
Civic Offices
www.fareham.gov.uk
15 July 2021

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Agenda Item 5

P/17/0266/OA

FAREHAM EAST, FAREHAM NORTH

APPLICANT: Buckland Development Limited

AGENT: David Lock Associates

SITE: Welborne, Land North of Fareham

PROPOSAL: A new community of up to 6000 dwellings (C3 and C2, including a care home of use class C2) together with a district centre (comprising up to 2,800m² food store retail (A1), up to 2,419m² of non-food retail (A1) and up to 2,571m² of other non-convenience/comparison retail use (A1 - A5)); a village centre (comprising up to 400m² food store retail (A1), up to 1,081m² of non-food retail (A1), a public house (up to 390m² A4 use) and up to 339m² of other non-convenience/comparison retail use (A1 - A5)); up to 30,000m² of commercial and employment space (B1); up to 35,000m² of general industrial use (B2); up to 40,000m² of warehousing space (B8); a hotel (up to 1,030m² C1 use); up to 2,480m² of community uses (D1 and D2); up to 2,200m² ancillary nursery (D1), health centre (D1) and veterinary services (D1); retention of Dean Farmhouse; a secondary school, Primary schools; pre-schools; green infrastructure including formal and informal open and amenity space; retention of some existing hedgerows, grassland, woodland areas, allotments, wildlife corridors; all supporting infrastructure; household waste recycling centre; requisite sub-stations; sustainable drainage systems including ponds and water courses; a remodelled M27 J10 including noise barrier(s); works to the A32 including the creation of three highway junctions and new crossing(s); distributor roads (accommodating a Bus Transit network) and connections to the surrounding cycleway and pedestrian network; car parking to support enhanced use of Dashwood; ground remodelling; any necessary demolition; with all matters reserved for future determination with the exception of the works to M27 J10 and the three highway junctions and related works to the A32.

OFFICER REPORT TO PLANNING COMMITTEE:

CASE OFFICER: Mark Wyatt (01329) 824704.

1.0 INTRODUCTION

- 1.1 This planning application is made by Buckland Development Limited (BDL) for the new community north of Fareham known as Welborne. The application was first submitted on 6th March 2017. Since that time a number of amendments have been made to the planning application and further amplifying information provided.
- 1.2 On 16th October 2019 the application was considered by the Planning Committee. The Planning Committee resolved to grant outline planning permission subject to conditions and the prior completion of a legal agreement pursuant to Section 106 of the Town and Country Planning Act 1990.
- 1.3 Since the first Planning Committee resolution, Officers have worked extensively with the applicant, Buckland Development Limited (BDL), and Hampshire County Council (HCC) to complete the Section 106 legal agreement. The legal agreement is now at an advanced stage and will be ready for signing shortly.

- 1.4** In December 2020 the applicant formally submitted further plans and documents to this Council for consideration. Those additional documents were as follows:
- Supplementary Planning Statement dated November 2020;
 - Viability Statement dated November 2020 and appendices;
 - Environmental Impact Assessment Statement of Conformity;
 - Biodiversity Enhancement Strategy; and
 - Plans showing minor changes to the design of the A32 road layout to correct the position of the Pegasus crossing to ensure consistency with the location of this crossing across all plans;
- 1.5** The submitted documents highlight changes in the circumstances surrounding the funding of the new “all-moves” Junction 10. The submitted documents set out what those changes are and the applicant’s revised proposals for how the works to Junction 10 can be funded.
- 1.6** A biodiversity enhancement strategy was also submitted to ensure this issue is fully addressed across the Welborne development in the light of emerging legislation in the Environment Bill 2020 which will seek to secure biodiversity net gain from developments. Some further amended plans have also been received to provide clarity over the precise positioning of a Pegasus crossing on the A32.
- 1.7** Consultation and publicity was undertaken upon the documents submitted in December 2020, and the comments received from statutory consultees and interested third parties were set out in the report.
- 1.8** The vast majority of the planning application which Members resolved to grant planning permission in October 2019, remained unaltered by the submissions received in December 2020.
- 1.9** On January 27th 2021 Members of the Planning Committee re-considered the Welborne planning application in light of the additional information received. The Planning Committee resolved to grant planning permission subject to the prior completion of the necessary Section 106 legal agreement for a second time.
- 1.10** Since the second resolution by the Planning Committee in January 2021 occurred, further discussion and negotiation has been ongoing regarding the Junction 10 funding package. In June 2021, the applicant submitted further documents in this regard. These additional documents are:
- Supplementary Planning Statement dated June 2021;
 - Viability Statement Update dated 3rd June 2021;
 - Welborne Cost Overrun Review; and
 - Environmental Impact Assessment Statement of Conformity.
- 1.11** Whilst the latest submissions leave the vast majority of the planning application considered in January 2021 unaltered, from a planning law perspective the whole planning application is now presented back to Members for consideration (members must determine the application as a whole). In the opinion of Officers there have been no material changes in national planning law, government guidance or policy since January 2021 that would in themselves alter the previous resolution of Members to grant planning permission.

1.12 The following report is an updated and amended version of the Officers' Report which was presented to the Planning Committee in January 2021.

1.13 The key relevant parts of this report which have been updated since the previous meeting, particularly in the light of the documents received in June 2021, are

- Development Viability; and
- Housing

In addition, as a result of the detailed negotiations on the Section 106 legal agreement the chapter on health has been adjusted accordingly also.

2.0 SITE DESCRIPTION

2.1 The planning application site is 377 hectares (932 acres) in area. A further 38 hectares (94 acres) of land known as Dashwood is located immediately to the north of the application site and is proposed to be used in association with the development. Dashwood is located within Winchester City Council's administrative boundary.

2.2 In terms of Welborne's relationship with existing settlements, the application site is located to the north of Fareham and a mile south of Wickham. The settlement of Funtley lies to the south west of the application site, with the village of Knowle to the west. Whilst most of the planning application site lies to the west of the A32, the planning application also includes the land at the Sawmills Industrial Estate together with land to the north, east and south of Boundary Oak School on the east side of the A32.

2.3 The application site is predominantly used for arable farming at present with some light industrial and commercial buildings at Dean Farm, Charity Farm and Crockerhill. There are also farmsteads and a few isolated residential properties located within the application site.

2.4 The site is located on a gentle slope and the gradient generally decreases from a ridge north of Heytesbury Farm down to the M27 in the south. The land beyond the ridge to the north of Heytesbury Farm falls away towards Wickham.

2.5 There are several heritage assets within and adjacent to the planning application site. Within the site there are 3 listed buildings. Roche Court and the accompanying Lodge building which form part of Boundary Oak School are located to the north east of Junction 10 and are both Grade II listed buildings. Dean Farmhouse, a Grade II* listed building, is located to the north of Junction 10 and is part of the Dean Farm Estate. There is also a Neolithic long barrow (burial site) within the grounds of the Dean Farm Estate.

2.6 There is a group of trees covered by a woodland tree preservation order to the south east of the A32, close to the on slip to the M27 motorway.

2.7 Plans will be available at the Planning Committee meeting showing the boundaries of the planning application site.

3.0 PROPOSAL

3.1 The planning application is made in outline, with full details provided at this stage for the accesses into Welborne. All other matters, being “Appearance”, “Landscaping”, “Layout”, “Scale” and “Access” (in respect of all internal access arrangements) are reserved for future approval.

3.2 Essentially, the application seeks approval in principle for: the development set out within the following paragraph; the broad distribution of land uses within the planning application site; the development parameters guiding future planning applications along with the detailed access arrangements into Welborne. These access arrangements relate to access points into the site from the A32 and a new junction 10 of the M27 to make it an “all moves” junction.

3.3 In more detail, the application seeks permission for:

- Up to 6000 dwellings (C3 and C2, including a care home of use class C2);
- A district centre (comprising up to 2,800m² food store retail (A1), up to 2,419m² of non-food retail (A1) and up to 2,571m² of other non-convenience/comparison retail use (A1 - A5));
- A village centre (comprising up to 400m² food store retail (A1), up to 1,081m² of non-food retail (A1), a public house (up to 390m² A4 use) and up to 339m² of other non-convenience/comparison retail use (A1 - A5));
- Up to 30,000m² of commercial and employment space (B1);
- Up to 35,000m² of general industrial use (B2);
- Up to 40,000m² of warehousing space (B8);
- A hotel (up to 1,030m² C1 use);
- Up to 2,480m² of community uses (D1 and D2);
- Up to 2,200m² ancillary nursery (D1), health centre (D1) and veterinary services (D1);
- The retention of Dean Farmhouse;
- A secondary school;
- 3 Primary schools;
- Nursery and pre-schools;
- Green infrastructure including formal and informal open and amenity space; retention of some existing hedgerows, grassland, woodland areas, allotments, wildlife corridors;
- All supporting infrastructure including requisite sub-stations;
- Sustainable drainage systems including ponds and water courses;
- Household waste recycling centre;
- Distributor roads (accommodating a Bus Transit network) and connections to the surrounding cycleway and pedestrian network;
- Car parking to support enhanced use of Dashwood;
- Ground remodelling; any necessary demolition.

3.4 The works to Junction 10 include:

- An “off slip” which would allow vehicles travelling towards the east on the M27 to leave the motorway at Welborne
- An “off slip” which would allow vehicles travelling towards the west on the M27 to leave the motorway at Welborne
- An “on slip” which would allow vehicles to join the M27 motorway at Welborne and travel westwards
- A new underpass beneath the M27 containing a dual carriageway that would link west bound traffic with Welborne (and beyond)

- Roads linking Junction 10 of the M27 and the A32

3.5 The works to the A32 include:

- The creation of three roundabouts along the A32 to provide access into the Welborne development along with an eastern 'arm' to the existing roundabout at Knowle Road

3.6 Plans will be available at the Planning Committee meeting showing the highway works proposed.

3.7 The application is supported with the following documents in addition to the detailed highway plans for the A32 and Junction 10 of the M27:

- Development Specification Statement;
- Parameter Plans:
 - Application site boundary;
 - Access, Roads and Junctions;
 - Land Use
 - Residential Density
 - Building Heights
 - Green Infrastructure
- Illustrative Supporting Plans:
 - Transport Strategy;
 - Indicative Cycling and Pedestrian Routes;
 - Sequencing Plan;
 - Illustrative Landscape Framework Plan;
- Structuring Plan;
- Design and Access Statement;
- Planning Statement;
- Transport Assessment;
- Framework Travel Plan;
- Public Transport Plan;
- Pedestrian and Cycling Strategy;
- Affordable Housing Statement;
- Site Waste and Construction Management Strategy;
- Delivery Management Statement;
- Employment and Training Plan;
- Sustainability Statement Including Energy Strategy;
- Minerals Statement;
- Green Infrastructure Statement;
- Heads of Terms and Indicative triggers for legal agreement;
- Open Space and Green Infrastructure Strategy;
- Retail Impact Assessment;
- Statement of Community Engagement;
- Shadow Appropriate Assessment (SAA);
- SANG Management Plan;
- Infrastructure Delivery Plan (IDP);
- A Simple Guide to the Planning Application;
- An Environmental Statement;
- A Site Wide Viability Report;

- Biodiversity Enhancement Strategy

4.0 PLANNING HISTORY

- 4.1 P/13/0658/EA REQUEST FOR ENVIRONMENTAL IMPACT ASSESSMENT (EIA) SCOPING OPINION UNDER REGULATION 13 OF THE TOWN & COUNTRY PLANNING (EIA) (ENGLAND) REGULATIONS 2011 FOR THE DEVELOPMENT OF UP TO 5,500 RESIDENTIAL UNITS AND UP TO 80,000 CUBIC METRES OF COMMERCIAL FLOORSPACE, WITH GREEN INFRASTRUCTURE, INCLUDING LOCAL CENTRES & AN EDUCATION FACILITY & AN ALL MOVES JUNCTION OF THE M27 MOTORWAY AND ACCESS ROAD FOR THE SPECIAL DEVELOPMENT AREA (SDA) NORTH OF FAREHAM (NOW KNOWN AS WELBORNE) – SCOPING OPINION ISSUED 20/09/2013
- 4.2 P/16/1171/EA SUPPLEMENTARY ADDENDUM TO EIA SCOPING REPORT – SCOPING OPINION ISSUED 14/11/2016
- 4.3 P/17/0189/FP DEMOLITION, SITE CLEARANCE AND REMEDIATION WITH THE ERECTION OF 72 C3 RESIDENTIAL DWELLINGS AND ASSOCIATED ACCESS, PARKING, ANCILLARY INFRASTRUCTURE AND LANDSCAPING WORKS – SAWMILLS INDUSTRIAL PARK, WICKHAM ROAD – APPEAL AGAINST NON-DETERMINATION – APPEAL DISMISSED 10/09/2018.
- 4.4 P/18/1192/FP MANAGEMENT OF WILDLIFE HABITAT, INCLUDING HABITAT CLEARANCE AND HABITAT CREATION, PLANTING AND STRUCTURAL LANDSCAPING, WHICH WILL INCLUDE MOVEMENT, RE-PROFILING AND REINSTATEMENT OF EXCAVATED TOPSOIL – PERMISSION 13/12/2018
- 4.5 P/20/0007/FP PROVISION OF ACCESS ROAD LINKING FUNTLEY HILL TO 70 & 72 KILN ROAD AND 1 & 2 DEAN FARM COTTAGES INCLUDING ASSOCIATED SITE CLEARANCE, GROUND REMODELLING AND ENGINEERING OPERATIONS – PERMISSION 19/03/2020
- 4.6 P/20/0288/FP ACCESS ROAD FROM THE A32 LEADING TO A PRIVATE DRIVEWAY LINKING TO BOUNDARY OAK SCHOOL, INCLUDING ASSOCIATED SITE CLEARANCE, GROUND REMODELLING AND ENGINEERING OPERATIONS, EAST OF A32 – PERMISSION 19/06/2020

- 4.7 P/20/1047/PA HELLYERS FARM WICKHAM ROAD FAREHAM,
DEMOLITION – PRIOR APPROVAL NOT REQUIRED
04/11/2020

5.0 POLICIES & GUIDANCE

- 5.1 The National Planning Policy Framework (NPPF)
- 5.2 Planning Practice Guidance (PPG)
- 5.3 Hampshire Minerals and Waste Plan (October 2013)
- 5.4 Fareham Borough Local Plan parts 1 and 2 are both considered relevant in so far as there are parts of the application site that fall outside of the Welborne Plan boundary.
- 5.5 Fareham Borough Council Core Strategy, 2011 (Local Plan Part 1)
- 5.6 Fareham Borough Council Development Sites and Policies Plan (Local Plan Part 2, 2015)
- 5.7 Fareham Borough Council Local Plan Part 3: The Welborne Plan (June 2015)
- 5.8 Fareham Borough Council Welborne Design Guidance Supplementary Planning Document (January 2016)

6.0 REPRESENTATIONS

- 6.1 **The first round of community notification was carried out on the 4th April 2017 in respect of the planning application as first submitted.**

The following comments were received:

- 6.2 Fourteen letters in support:
- More housing welcomed.
 - The provision of an all moves junction is positive
 - Support is subject to the early provision of infrastructure
- 6.3 Eighty-three letters objecting to the proposal including the comments of groups such as the Fareham Society, Wallington Village Community Association, Funtley Village Society, Knowle Village Residents Association, The Wickham Society, Wickham Residents' Association, Wickham Parish Council and RailFuture:
- 6.4 Principle for building at Welborne:
- The incursion north of Albany Farm into the countryside is unacceptable.
 - The development appears to be unviable.
 - The Welborne Plan requires a fresh Examination in Public.
 - The development is too big.
 - Major road infrastructure should be provided prior to house building.
 - Loss of countryside.

- The area is overcrowded
- Impact on Knowle and Wickham

6.5 Layout and design

- The parameter plans need to be updated.
- Building heights close to listed buildings should be reduced
- There are no plans for a place of worship
- The location of sports pitches adjacent to the motorway is undesirable
- Inadequate provision for open space and Suitable Alternative Natural Greenspace (SANG) is shown. Dashwood is outside of the Borough and as a Site of Importance for Nature Conservation (SINC) is not suitable for intensive recreational use
- Early houses will be remote from the district centre
- The allotments should be sited more centrally for community use
- Deviations from the Strategic Framework Diagram are unacceptable.
- The District Centre is not well connected to the main residential parts of Welborne
- The phasing should start at the south and work north
- Houses next to Knowle Road will confuse the identity of Welborne and Knowle. A buffer to Knowle must be retained
- The new community is divided in two by the A32
- The width of the Welborne Mile should be increased.
- Concern at the central park being over a pipeline
- The village centre should not be on Knowle Road
- The employment area and new slip road is too close to Funtley
- Green buffers should be at least 200 metres wide
- Funtley buffer planting should be provided in phase 1 not 2.

6.6 Education:

- The school should not be surrounded by roads on three of its sides
- School entrances should be onto green spaces.
- There is no college proposed.

6.7 Transport:

- Junction 10 has substandard weaving distances.
- North Hill is too narrow for two large vehicles to pass.
- Lack of safe crossing over Kiln Road
- Impact of the proposed car park for Fareham Common on Funtley Hill
- Hoads Hill speed limit should be reduced
- North Hill is unsuitable for the Eclipse bus service with a 7.5 tonne weight limit
- The south of J10 (Fareham Common) will be wet/frozen in the winter
- The A32 will divide the development.
- The Junction 10 plans are convoluted
- Could a link road to Junction 11 be provided instead of Junction 10?
- Impact of increased traffic and parking on existing and proposed residential roads
- The proposed North Hill traffic lights will cause delays
- Impact of traffic on Wickham, M27, Wickham Road, Funtley Bridge, North Hill, Old Turnpike & Kiln Road.
- The closure of Pook Lane will negate the bypass option for traffic and

add to the extreme congestion on the Cams Hill A27 leading to the Delme roundabout

- Impact of increased noise, vibration and air pollution.
- The Solent Sub-Regional Transport Model (SRTM) Data is out of date, uses old census information and is not conclusive.
- There needs to be significant and more flexible public transport
- The Bus Rapid Transit (BRT) should have a dedicated lane
- Cycling infrastructure should be segregated and designed in accordance with government advice for cycling infrastructure to which there is no reference in the application.
- The proposed cycle crossings over the M27 are unclear.
- Lack of connections to the Meon Valley Trail.
- Lack of funding for Junction 10.
- Concern at the retention of Kneller Court Lane as a cycleway in Phase 1
- The motorway junction and A32 alterations must come first.
- Construction traffic must access the site from the south only.

6.8 Rail Halt:

- Are the rail costs realistic and cost effective?
- A new station should be integral to the development.
- Is the rail halt in the best location with adequate links and parking?

6.9 Ecology:

- Impact on Dashwood
- Insufficient ecological mitigation
- Vegetation south of Knowle Road should be retained.
- Loss of trees and habitat.

6.10 Health:

- The GP practice should be delivered in the initial phases.
- Healthcare provision must be confirmed prior to approval.
- How can a GP practice be secured if the Clinical Commissioning Group is not in support?
- Reliance on neighbouring practices will increase waiting times.
- Impact on QA Hospital

6.11 Utilities and services

- Expansion of Albion Water treatment works not supported due to existing odour nuisance and HGV traffic using Mayles Lane
- Would Albion Water treatment works be upgraded?
- Clarity required regarding the overhead power lines
- Impact on sewerage infrastructure.
- Concern regarding insufficient water supply.

6.12 Flood risk and drainage

- Sustainable Urban Drainage (SUDs) should be provided in the initial phases.
- Adequate measures are required to prevent pollution of watercourses.
- Impact of underpass on flood risk
- Impact on the Wallington river catchment area

6.13 Noise and Air Quality:

- Resurfacing of the M27 would reduce noise pollution
- Impact of increased noise and air pollution particularly on the southern part of Welborne

6.14 Other comments:

- Concerns regarding delivery post Brexit due to labour shortages.
- Lack of provision for a regional traveller transit site or permanent pitches.
- No requirement for an additional household waste and recycling centre.
- Impact on police and fire services

6.15 The following comments were also made which neither support nor object to the proposal:

- Will the houses be sustainable and suitable for renewable energy?
- Will this be a model for recycling and waste reduction?
- Any house suitable for off road parking should have a dropped kerb
- What is proposed for the existing Junction 10 westbound off slip circular area?
- How will expansion into Knowle be prevented?
- Will there be any supported living accommodation for young adults with physical and learning disabilities?
- Parking should be prevented along Knowle Road by the proposed school
- Cycle access to Knowle and the site should be clearly identified
- Homes should be carbon neutral
- A32 crossing points should be convenient for the users and not for cars
- Building heights next to villages should be restricted
- All dwellings should have at least two car parking spaces
- Structural planning and landscaping should be provided in the early phases
- Will HCC support a new household waste and recycling centre?
- Neighbours to the site should be allowed to invest in a community renewable energy or district heating programme.

6.16 **The second round of community consultation (following receipt of amended plans and information) was carried out on 10th January 2019.**

Eleven of the comments support the application and raise the following additional issues:

- The garden village principles should ensure architectural diversity
- The provision of housing at this scale will ensure that infrastructure is also provided.
- Support, subject to an alternative route being provided to Pook Lane and a rail station being provided at the start of the development.
- Support subject to infrastructure being provided up front.
- Development at Welborne is preferable to development at Newlands
- The provision of a toucan crossing across Kiln Road is welcomed.

6.17 Forty-two of the representations object to the application and raise the

following additional issues:

6.18 Principle

- It is disappointing that the number of houses has been reduced from 7,500 to 6,000.

6.19 Building Form

- More apartments should be provided to make efficient use of the land
- Building heights on the western edge should be restricted to 2 storeys.
- Inappropriate proposed density
- A village square would create a sense of community
- The proposed densities are acceptable, provided there is no further deviation.
- All houses should have access to an electrical charging point.

6.20 Heritage

- More semi-natural greenspace is required next to Roche Court to prevent an adverse impact on its setting.

6.21 Highways

- Provision should be made for parking motorcycles
- The proposed pedestrian and cycle link across the M27 at Junction 10 would not be attractive or safe to use.
- The use of the footpath in Kneller Court Lane to provide access to Fareham Common is not safe.
- The width of residential roads is too narrow and parking sizes and garages aren't large enough.
- The access road to Knowle must be kept free of obstruction particularly during the construction process.
- Concerns regarding the redistribution of traffic onto unsuitable single carriageway roads.
- Concern regarding use of the hard shoulder to relieve congestion
- The new motorway roundabout should be joined to Pook Lane to reduce congestion on North Hill.
- The lack of swimming pool provision in Welborne will result in increased traffic into Fareham.
- A link road is required to prevent the need for traffic joining the M27 having to traverse North Hill.
- The District Centre should be better connected to the residential areas.
- Lack of car parking for school drop offs
- Footpaths should be provided in the initial phases
- The Sub Regional Transport Model (SRTM) run 15 includes proposals that are not in the TA.
- The assumed SRTM relies on unsound assumptions and takes no account of traffic from recently approved greenfield sites.
- The Transport Assessment relies on inaccurate measurements to local facilities taken from the edge of Welborne.
- The routing of buses up North Hill is unacceptable because of its steep gradient and limited width.
- The BRT route should include a stop at the bus station as well as the railway station.

- The primary road network should include access to the rail halt.
- The proposed bus service will not be sufficient to encourage people to use it instead of driving.
- The Bus Rapid Transit (BRT) should be provided early in the development
- Bridle paths should be appropriately surfaced.
- Pedestrian and cycle paths should link Welborne to Knowle.
- The cycle connection to Wickham should be off-road.
- Loss of footpath 90 under the M27
- The bridleway track close to Sainsburys requires riders to use busy roads to return (if they want a circular route.)

6.22 Impact on Infrastructure (other than highways) and facilities

- Will access be provided to rights of way at all times?
- Impact on local schools
- Schools should be provided from the start of the development
- The plan should allow for a minimum level of services as well as a maximum.
- Impact on car parking in the centre of Fareham
- Fareham Labour Party would oppose the introduction of any Free Schools
- The health hub must include an NHS dental practice
- Financial contributions towards existing healthcare provision should be sought.

6.23 Flooding & Drainage

- Increased pollution
- The SUDS plan does not pay sufficient attention to the level of the water table surrounding the site and throughout Funtley.
- Lack of information regarding prevention of flooding and subsidence.
- Insufficient detail regarding the upgrading of Peel Common sewers

6.24 Impact on residential amenity

- The household waste recycling centre is still too close to Funtley.
- Impact on outlook from houses on Kiln Road.
- Impact on Funtley
- An acoustic barrier should be proposed on the south as well as the north side of the M27 to protect existing residents.
- Space for 500 cars should be safeguarded for the railway station to prevent casual parking in Knowle.

6.25 Phasing

- The schools need to be constructed before the houses
- Tree planting along the north and west boundaries is required early in the project
- The shared footpath/ cycle path from the new underpass to Kiln Road should be provided earlier than proposed (in place for the 5101th occupation.)
- Increased impact on amenities in Fareham due to amenities at Welborne being provided in later sequences
- The Delivery Sequencing Plan conflicts with the Sequencing diagrams.

6.26 Ecology

- Impact on flora and fauna in Botley Wood, Leachpond Copse and Flagpond Copse.
- Impact on bat roosts

6.27 Green Infrastructure

- The buffers should be wider to protect existing settlements.
- Increased financial contributions to the Bird Aware strategy should be sought to ensure sufficient mitigation relating to the Portsmouth Harbour and Solent and Southampton Water Special Protection Areas (SPAs.)
- Welborne Mile SANG should be provided early to relieve the pressure on Dashwood.
- More green space is required to the east of the housing to the east of the A32.

6.28 Sports Facilities

- The sports facilities should satisfy Sport England's standards.
- Impact of noise and pollution from the M27 on the sports hub.

6.29 Miscellaneous

- Has a full cost benefit analysis that considers the environmental impact been carried out?
- Could Buckland provide a contribution to Knowle Village to provide an extension to their community hall?
- Will the bridge at North Hill (which has a weight limit of 7.5 tonnes) be capable of supporting a bus loaded with passengers?
- It is imperative that a risk register and accurate timetables are maintained and published to enable local residents to keep track of progress.
- Will the cost of houses be accessible to the majority of residents in Fareham?
- 50% of the housing should be affordable with 30% allocated for rent.
- The deviations from the strategic framework diagram are not acceptable.

6.30 The third round of community consultation (following receipt of amended plans and information) was carried out on 19th March 2019.

Five of the comments support the application.

6.31 Twenty-three of the representations object to the application and raise the following additional issues:

6.32 Highways

- What measures will be taken to ensure that increased traffic does not have an adverse impact on the overflowing drain at the bottom of North Hill?
- Does the cycling strategy accord with the interim advice note 195/16 IRN195?
- The Transport Assessment (TA) makes illogical statements regarding the movement of traffic between Wickham Road, North Hill and Old Turnpike and fails to recognise the interaction between Old Turnpike and Serpentine Road.

- Why does the TA include different distances for buses and cars to the Bus Station?
- The TA contains several errors.
- The mitigation measures rely on Traffic Regulation Orders (TROs) with no guarantee that they can be implemented.
- Why is HCC request for further consultation with residents and businesses limited to the A32 Wickham Road?
- The TA's positive conclusion is premature given HCC's concerns.

6.33 SANGS

- There will be a need to ensure that there is no conflict between the 2 temporary SANGs in phases 1 and 2 with the development of the adjoining proposed residential areas.
- The temporary SANGS strategy needs approval by Natural England.
- The east/west green link along Knowle Road should also be shown as a green link on the GI parameter plan.
- The buffer to Funtley should be increased to 75 metres or alternatively the height of adjacent buildings reduced and should be set out in the parameter plan rather than as a development principle.

6.34 Health

- Where is the evidence explaining what the contribution sought by the CCG would be spent on?
- Concerns regarding the late provision of a doctor's surgery at Welborne. Fareham has a GP to patient ratio that is almost 40 per cent higher than the national standard. The GP to patient ratio should be reduced to the national average which would require the extension of Wickham Surgery, and would significantly reduce the spare capacity in the Fareham and Portchester surgeries without any development at Welborne.

6.35 Education

- The early years provision should accord with HCC's recommendations.
- The school pitches must also be available for community use.
- The triggers for the timing of school openings should be incorporated in a Section 106 agreement.

6.36 Heritage

- Buildings next to Dean Farm should not exceed 12m. A high-level development principle is not sufficient to protect these buildings.
- Lack of improvements to boundary provision next to Dean Farm and Roche Court.

6.37 Footpaths

- The protection of rights of way is supported. Early consultation with the public and amenity groups on any changes will be required.

6.38 Flood and Water Management

- The HCCs recommended conditions regarding flood and water management need to be incorporated.

6.39 Extra Care Provision

- A second care home should be provided.

6.40 Green Infrastructure

- A wide planting belt should be provided on the eastern boundary.
- The allotments remain in an unsuitable location.

6.41 Other issues

- The amended plans do not address the differences between the Strategic Framework Diagram and the Structuring Plan for the: District Centre, sports pitches, allotments, landscaped buffers and the primary road network.
- The centre continues to be disconnected from the main residential areas.
- The sports hub remains in an unsuitable location.
- There remains a lack of information regarding the reinforcements to the sewer network.

6.42 The fourth round of community consultation (following receipt of amended plans and information) was carried out on 1st August 2019.

6.43 All eight of the representations received object to the application and raise the following additional issues:

- The Shadow Appropriate Assessment relies on a maximum of 110l per person per day water usage. Aspirations to comply with this level of water usage are insufficient to comply with the relevant directives.
- There are no proposals as to how water usage would be achieved.
- The proposed phasing in relation to schools is unrealistic.

6.44 Knowle Residents Association

- Concern remains regarding the loss of existing vegetation along Knowle Road which has huge biodiversity value, would help mitigate air pollution, improve surface water management, mitigate climate change and reduce energy consumption.

6.45 The Fareham Society

- Concern regarding the increased size of the District Centre.
- The non-strategic greenspace should be approved at this stage to prevent any overall loss of green infrastructure in the future.
- The buffer planting notation should be retained on the land use parameter plan.
- The exact location of the east/west links should be approved at this stage.
- The location and boundaries of the schools should be approved at this stage. The Society is concerned that the space allocated for schools appears to be insufficient according to HCC's response.
- Concern regarding a general increase in building heights, which would result in a more intensive appearance.
- Buildings near to Dean Farmhouse should be limited to 12m in height not 14m as proposed.
- The net biodiversity gain is welcomed however there needs to be ongoing monitoring as suggested by HCC's ecologist to ensure the net gain is achieved.

- There appear to be significant errors in the figures included in appendix K of the Transport Addendum.
- The TAA Addendum confirms The Society's concerns that the impact of traffic from the new J10 will result in more traffic impact on Fareham than Welborne itself. All of the 'improvements' to reduce congestion simply transfer traffic to other less suitable roads.
- The impact on the North Hill / Kiln Road / Park Lane / Old Turnpike junction remains unacceptable.
- Failure to provide any Lifetime Homes within the first 1,000 homes is contrary to WEL17.
- The applicant's viability report does not constitute a 'robust and transparent appraisal' as required by Policy WEL18 and therefore should not be accepted as a justification for not providing affordable housing.
- Why should the additional costs to J10 as a result of the smart motorway fall on the applicant?
- Is there any additional funding from central government that could be provided to replace the recycled New Homes Bonus?
- No viability evidence has been provided to support the move from a ratio of 50:50 affordable rent: intermediate housing, to a 70:30 split.
- Concern re the absence of social rented housing.
- The Viability Statement does not provide any evidence as to why the increased cost of Passivhaus houses in the first stage of development would impact the viability.
- Concern regarding lack of commitment to the provision of Passivhaus beyond the first phase of development.

6.46 Further representations were received between the publication of the Agenda for the meeting of the Planning Committee on 16th October 2019 and the meeting being held. These were reported to the planning committee by written update. These details are reproduced here:

6.47 Four further representations had been received from members of the public since the publication of the agenda. No further new issues had been raised to those summarised in this part 6.0 of the report.

6.48 Within the CBRE report, Appendix B, the following amendments were made:

Page 28, the sentence starting "The rates applied by BDL are..." should finish with the word "above".

Page 30, the final sentence, on the penultimate line should read as "Our review of the BDL growth scenarios has therefore sought to determine if the 2% pa..."

6.49 A letter was also received from the Solent Local Enterprise Partnership (SLEP). The SLEP confirms it is very supportive of the Welborne development, which features prominently in the Solent Strategic Economic Plan and is identified as a project was prioritised by the SLEP and formed part of its Local Growth Deal proposal to Government. While the Growth Deal funding has been allocated to Junction 10, the deployment of the funding is subject to a number of requirements. These include the approval of a full business case by the Department for Transport, which would require a detailed design to be agreed and all funding for the Junction to be in place. Whilst the Department for Transport required the Growth Deal funding to be spent by March 2021, the

Solent LEP are seeking assurances from Government that the funding can be spent beyond the 31st March 2021.

6.50 A further letter was also received on behalf of the Portsmouth Hospitals NHS Trust and University Hospital Southampton in response to the Officer Report. It makes the following points:

- The new A&E at the QA is irrelevant to the impact this development will have on both hospitals
- The consultation on the Plan is over five years ago. It has nothing to do with the consultation responses sent in 2018
- Both Trusts have provided evidence of the impact
- The Trusts provide planned and emergency healthcare and agrees a service level agreement on an annual basis with their commissioner. A contract term of two years is standard.
- Contracts are negotiated on historical contract performance
- Growth reflects the increasing costs of delivering health
- Local population growth feeds into CCG target allocations from ONS data. This takes three years to affect growth allocations to the CCG
- Until this growth is added to the CCG allocation it does not form part of the contract between the commissioners and the Trusts
- The Trusts do not receive funding retrospectively
- The Trusts do not get allocated population growth, however as properties are occupied the growth manifests itself in a requirement for the Trusts to treat people resulting in an overspend.
- The Trusts cannot refuse to treat a patient on the ground of lack of capacity to provide the service.
- If the Trusts fail to meet its performance targets it is penalised through withdrawal of income
- It is not possible for the Trusts to predict when planning applications are made and delivered
- It does not take into account housing land supply, housing need or housing projections
- Both Trusts are at full capacity.
- The NHS 10 year plan has nothing to do with the CIL Regulation 122 tests.
- There is no evidence that the health hub is a) deliverable and b) will provide support to health services.
- The EIA assessment is desk based and is fundamentally faulty
- The request for a contribution is justified and do meet the Tests as has been confirmed by previous Inspectors.
- It is necessary to make the development acceptable as without it the population increase will adversely affect the standard of service that can be provided
- The contribution is related to the development because it is based on the new population that will use the Trusts services
- The contribution is fairly and reasonably related to the development as it is linked to the size of the new population.

6.51 The fifth round of community consultation (following receipt of amended plans and information) was carried out on 4th January 2021.

6.52 Three letters of support:

- As a young person I understand the need for more housing – my only concern is if there is enough affordable homes?.
- I like the designs and style of the houses.
- The junction upgrade is needed.

6.53 Two Letters with just comments;

- Its regrettable that the affordable homes go down but I'm supportive of this as some homes are better than none.

6.54 Forty three representations of objection covering the following issues:

Principle of development:

- More of our countryside being developed into housing with a total disregard for the residents that pay taxes and live in the Borough
- Infrastructure won't materialise; the developers will plead poverty and the Council will roll over.
- I would support this if it was to be it for development in Fareham. Services and residents cannot cope with anymore.
- Is the demand for these houses from Fareham or is it overspill for outside?
- To suggest Welborne could fail without the SLEP money is disingenuous. The scheme was always going to fall short.
- All infrastructure should be provided before any houses are built
- The application should state what each element of the plan consists of. Having "up to" against each dimension means amenities can be watered down and more land provided for housing

6.55 Housing

- If Affordable Housing was less than 30% in the first place would it have gained approval?
- Affordable housing is desperately needed in Fareham. The one positive from Welborne was 30% affordable housing. It would now appear that FBC are considering a concession on this. Please stand firm and do not give in.
- The delivery of affordable housing is part of the Council's long standing justification for the development.
- The proposed schedule must be renegotiated to make more affordable homes available much sooner.
- If BDL are desperate to build then they should reduce their profit margin to cover the costs of the M27 work and deliver affordable housing at the level agreed or even more.
- FBC could negotiate to take the land and build more affordable homes and recoup costs from rents and maintain the developer returns.
- The level of affordable housing and the costs of junction 10 is unrelated and this proposal is therefore entirely unreasonable.
- Affordable homes are sought after. We don't need large houses on large plots, we need well designed, efficient flats and small houses.
- A reduction in 30% provision should be put back to the people.
- The Council should agree a figure of affordable housing and a schedule of delivery and that should be delivered regardless.

- Affordable housing should not be “back ended” but delivered now and throughout the development.
- Why are the changes in the housing proposal picking up all the costs of the £20m commitment? Are there no other budgets which can take a share?

6.56 Viability Considerations:

- The BDL submission has a return on cost of 1.5%. If this is tested and found to be correct, how can this project be allowed to proceed. This is high risk. Is there any contingency in the calculation?
- How will BDL be able to contract house building on such a tight margin?
- What about the quality of those first 1000 homes?
- How will FBC be able to stress test this proposal?
- Why is the first viability review after 3,000 homes? What benefits are there for selecting this first review timing and then every 750 homes.
- Why should BDL benefit from any surplus above 20% on the HIF element of the viability review mechanism?
- BDL only wish to commit to greater than 10% affordable housing after the guaranteed return of 20% is locked in. Why is this a deal for FBC to accept? This provides a high level of benefit to BDL.
- To determine viability costs must be deducted from the gross development value as such the existing land value, the projected development value and the expected costs must be made available
- What is Buckland’s financial contingency to meet any further financial burden / impact?

6.57 Employment

- Where will all the jobs be for these houses? In the current pandemic companies are laying off staff everywhere.
- The provision of housing along the M27 has not been balanced with the need for jobs

6.58 Ecology

- Surprised to read that the documents have no comment on the impacts to the immediate neighbourhood to Welborne such as Botley Wood, West Walk, Portsdown and Wickham Common; this is a dereliction of duty by the Planners.
- Fareham already has a nitrate problem and I would expect a more responsible attitude from the Borough Council in this regard. How will this issue be addressed with Welborne?

6.59 Transport

- Support has always been conditional on the provision of the new rail station at Welborne.
- Traffic impacts on the town and places like Kiln Road. The money spent on then junction would be better spent on our roads.
- There is far too little parking being provided. Welborne will be no different to Whiteley.

- The local roads and motorway are already gridlocked. 6,000 homes and 12,000 cars will just make this worse.
- Public transport must be available for the first residents

6.60 Health and Public Services

- I do not see any provision for a dental surgery. A hospital instead of a health centre would relieve the pressure on the QA which is already oversubscribed.
- Police provision is already overstretched, these plans should be shelved for now.

6.61 Education

- There is no adequate commitment to provide schools from the start which will put pressure on existing schools in the area.

6.62 Utilities

- There are no details on water or sewerage provision
- This type of development would exacerbate ground water flooding

6.63 Sustainability

- FBC are committed to reducing carbon emissions so the houses should be Passivhaus build.
- This highlights the first stage in reducing the quality of the project by removing the desirability of Passivhaus and Lifetime homes.

6.64 **Further representations were received between the publication of the Agenda for the meeting of the Planning Committee on 27th January 2021 and the meeting being held. These were reported to the planning committee by written and verbal update. These details are reproduced here:**

6.65 1 additional letter with comments:

- Get on with it so Fareham has a firm base to work from instead of being rendered invalid due to delays at Welborne and government changing the rules.

6.66 16 further letters of objection have been received since the publication of the main agenda report including those from The Fareham Society and The Knowle Residents Association. These letters cover the issues already summarised in the main report plus:

6.67 Viability:

- What is highlighted by the current situation are the problems associated by development of this type and scale in a location where the development is dependent on major infrastructure and the associated costs
- Affordable housing takes the hit but what is next? Schools, shopping centre, business park, health facility and so on...there appears to be no contingency to absorb further future issues.
- The degree of movement away from the provisions of the Welborne Plan on these important housing matters at this stage, as well as when the application

was first before the Council, is of great concern

- It is crucial that at the Viability Review Stages the Council commissions a robust assessment of the case put forward by the applicant.
- Fail to see in a period of increased national debt why the tax payer should be contributing close to £50 million for work to the M27 that would not be needed other than for this development, this work if Buckland feel the need to build should be meet by them not the tax payer

6.68 Housing:

- The standards and quality of the housing within the Welborne development is at risk of being compromised
- The proposed changes in the balance and timings of introducing the social housing complement within Welborne will risk undermining the future social cohesion of this development

6.69 Biodiversity:

- The HRA needs to be completed by the LPA not the applicant
- Agree with NFDC requesting site specific and in combination effects that may be identified in the HRA
- Water usage restriction to 110l per person per day needs to be a condition

6.70 Utilities:

- Southern Water cannot calculate sewage and waste water issues because they have not been provided with the required plans with detail.
- Surely, at the very outset, major road issues, sewage and water provision and water runoff issues should have been addressed?

6.71 Transport:

- Please ensure there is a two way traffic free cycle way linking the development to Fareham town centre
- Is there any assurance that traffic will not increase in old Turnpike

6.72 Landscape Impact:

- Object to having to drive through this development to gain access to Knowle Village

6.73 Planning Balance:

- Much now stands upon the timely provision of housing at Welborne to ensure that other areas of the Borough remain under less threat of development. There are threats imposed by the absence of a 5-year housing land supply on the proper planned development of the Borough

6.74 The Council has also received a later representation from Pegasus planning consultants relating to the consultation process in January this year. Officers verbally updated the Committee that the consultation process and the information in the application and as reported to members is in accordance with the relevant legislation including the EIA regulations

6.75 The sixth round of community consultation (following receipt of amended plans and information) was carried out on 14th June 2021

6.76 Thirteen representations have been received including comments from the Fareham Society. The majority raise matters already covered in the previous

rounds of consultation set out above. The new issues raised, specific to this round of additional documents, are:

- Cost overruns should be the responsibility of the developer alone and affordable housing should be at the minimum of 30%;
- Welborne is not financially sound and the viability of the scheme must be called into question;
- More fudging of the core criteria surrounding the ethos of Welborne. This is a further dilution of what was promised to the residents of Fareham;
- Need assurance that the applicant's proposal to be able to choose on which reserved matters applications to apply any reduction of affordable units would not lead to an unacceptably low affordable housing provision in the early phases of the development;
- The current proposal requires close scrutiny and the viability justification offered by the applicant should undergo a thorough review before any decision is made;
- As the cost of J10 continues to escalate the developer appears to be cutting costs in every way they can - Passivhaus, affordable housing, on site infrastructure to make up the short fall - is the project still viable?
- Apparently FBC has no power to challenge the viability statement whereby an overrun cost is directly used to offset the number of affordable homes. Can the decision by HCC to demand any overruns be guaranteed by the developer not be challenged or another guarantee be obtained?
- The decision to co-operate with other councils on housing provision surely has some limits?

7.0 Consultations

7.1 At each round of consultation the Statutory Consultees were also consulted. The comments below are a summary of all the comments provided through all rounds of consultation.

EXTERNAL CONSULTTEES:

7.2 New Forest District Council

No objection:

- subject to consideration of the 'in combination' effects on Natura 2000 sites in the New Forest and the Solent being appropriately mitigated in consultation with Natural England.

7.3 Test Valley Borough Council

No objection

7.4 Portsmouth City Council

Support:

- There is a high level of need for affordable housing in the Portsmouth housing market area, therefore the amount of affordable housing should be maximised.

- The proposed new employment is supported however delivery will need to be monitored to ensure that the floorspace delivered does not contradict the aim of the Partnership for South Hampshire (PfSH) position statement to prioritise employment in Portsmouth and Southampton.

7.5 Havant Borough Council

Support the delivery of the Garden Community.

7.6 Eastleigh Borough Council

Support the delivery of the Garden Community.

7.7 South Downs National Park Authority

Comments:

- The site should be viewed as a gateway into the South Downs National Park (SDNP) and the green infrastructure strategy strengthened to promote opportunities to understand and enjoy the SDNP.
- The Green Infrastructure strategy should avoid using buffers as they are not solutions to landscape or visual impacts.
- The proposed footpath and cycle links should be strengthened by providing footpath and cycle links to the West Walk and the Meon Valley Trail.
- The provision of native planting is supported.
- The prevention of access to Blakes Copse is supported and needs to be secured in the legal agreement.
- The restoration and enhancement of Dashwood is supported.
- An upward light ratio of zero should be used to protect the southern edge of the Dark Skies Reserve (north of Wickham.)

7.8 Winchester City Council (WCC)

No objection:

- WCC supports the inclusion of the M27 J10 arrangements within Sequence 1, along with the provision of SANGS at Dashwood.
- WCC wishes to avoid development to the north of the Knowle access road forming an isolated new development area, by limiting the scale of development in this location during the early phases of development.
- WCC seeks clarification as to whether there will be a need to expand the Albion Water treatment works.
- It is important that the changes to the Wickham A32 roundabout are implemented so as to discourage unnecessary northward journeys while accommodating the development now allocated off School Lane which is under construction.

7.9 Gosport Borough Council

Supports the principle of the Welborne development and the proposal for an all moves junction 10.

- There is likely to be some scope to increase residential densities on parts of the site which would reduce the need to develop other greenfield sites and of making public transport modes more viable from an earlier date.
- Phasing – It will be important to ensure that the delivery of the permitted number, density and range of housing is implemented at similar rates to those proposed in the phasing plan and opportunities taken to speed up delivery.
- Early provision of the BRT will be critical to ensure genuine transport choice.
- The provision of an all moves J10 will lessen the impact of the development on J11 and junctions and roundabouts within Fareham Town Centre. It is critical that the delivery of J10 is co-ordinated with the Smart Motorways programme in order to minimise disruption and ensure that development does not put unacceptable pressures on J11 and routes through Fareham Town Centre and Air Quality Management Areas.

7.10 Southampton City Council:

- No comments

7.11 Southern Gas Networks (SGN)

Officers have received verbal confirmation that SGN have no objection to the application as now amended subject to conditions to cover:

- Construction management plans including measures to avoid impacts within 15m of the main; and
- proposed layouts for the development within 15m of the high pressure and intermediate pressure gas main on site to require detail on levels, main protection or diversion.

7.12 Health and Safety Executive

No objection

7.13 Scottish and Southern Electric

No objection subject to the incorporation of a condition that requires a mitigation strategy for the retention and/or re-configuration of existing electricity distribution apparatus to be agreed with SSE prior to the determination of the first phase of reserved matters.

7.14 Albion Water

No objection.

- Albion supports the application and is keen to provide a full range of water services to the site and is able to adopt and maintain the SUDS and green infrastructure in addition to water, recycling and wastewater services.

7.15 Southern Water

Comments:

- Additional local infrastructure is required to accommodate the increased flows into the wastewater system. Some of the houses initially built could potentially be provided prior to network reinforcements.
- The detailed design should ensure that there are no ponds, swales or soakaways within 5m of sewers. Any residential surface water drainage to be adopted by the sewerage undertaker needs to comply with the Sewers for Adoption standards and Southern Water requirements.
- If planning permission is granted conditions are required.

7.16 Portsmouth Water

Comments:

- Portsmouth Water has sufficient capacity for a conventional water supply and the Water Resources Management Plan allows for housing growth.
- There will be the need to divert water mains. The A32 could be a potential diversion route for a number of water mains
- The proposed additional investigative works need to be secured by condition.
- The proposed intrusive investigations will comprise the identification of detailed solution features on site. This needs to be secured by condition and the results used to inform the detailed layout.
- The proposed surface water drainage strategy for the site proposes two methods: infiltration via a borehole soakaway with upstream attenuation in a basin or tank, and infiltration via a basin. The detailed proposals will be assessed within future applications.
- On-site surface water storage and treatment is proposed via SUDS. Portsmouth Water welcomes the proposed pollution prevention measures.
- The maintenance and adoption details will be subject to approval in future applications.
- Portsmouth Water have a presumption against the use of deep-bore soakaways at this location because of the proximity to the drinking water supply. The proposed deep bore soakaways will therefore require hydrogeological risk assessments to demonstrate how the risk to groundwater would be mitigated by the design. The use of deep pit-based systems will only be agreed if a number of criteria are satisfied.
- Run-off from the highway will be collected by a variety of different systems.
- Portsmouth Water request that they are consulted together with the Environment Agency regarding the detailed design that is proposed with future applications.
- A piling risk assessment and method statement is required by condition.

7.17 Environment Agency

No objection subject to conditions

7.18 Hampshire Gardens Trust

Comments (from the third round of consultation in March 2019):

- There is a need to protect and enhance valued landscapes.
- Dean Farm:

- The proposed development would appear to affect the setting of this Grade II* listed building.
- Landscape:
 - The landscape buffer protecting the boundaries of Roche Court has decreased and should be reinstated.
 - The site appears to stray beyond the area allocated in the Welborne Plan.

7.19 Highways England

Recommend that conditions be attached to any planning permission that is granted.

- The results of the modelling indicate that Welborne can be accommodated on the Strategic Road Network without a severe impact, subject to the proposed Junction 10 proposals being implemented.
- At this stage Highways England, based on the general arrangement drawings, have agreed the principle of an improved M27 Junction 10. In addition the principle of noise attenuation barriers within the M27 highway boundary has been agreed
- The suggested conditions cover:
 - Threshold of development for the delivery of the junction works;
 - Details of the noise barrier; and
 - Construction traffic management

7.20 Historic England

- Historic England has confirmed that they are in agreement with the Conservation Officer's assessment of the application (set out under the Internal Consultees section of this report below) and have offered no further comment.

7.21 Natural England:

No objection subject to conditions.

Natural England concur with the shadow Appropriate Assessment that concludes that the proposal will not result in adverse effects on the integrity of any of the sites in question.

- It is considered that without appropriate mitigation the application would have an adverse effect on the integrity of the Portsmouth Harbour Special Protection Area and the Solent and Southampton Water Special Protection Area.
- In order to mitigate these adverse effects and to make the development acceptable, the following mitigation measures will need to be secured:
 - SRMP / Bird Aware contributions
 - SANG Management Plans and Phasing
 - Nitrogen neutrality conditions
 - Biodiversity Mitigation and Enhancement Plan
 - Construction Environmental Management Plan.
- The temporary SANGs strategy is welcomed and it is recommended that this is secured.
- It is advised that an appropriate planning condition or obligation is attached to any planning permission to secure these measures.

- Nitrates:
 - It is reasonable to assume that households will achieve the target of not exceeding 110 l of water usage per person per day. This would enable up to 6,000 houses to be built without any impact on the Solent European sites.
 - We recommend that the planning permission secures a condition for water use of 110 litres per person per day (or less) and that all areas of open space that use the 5 kg/ha/yr rate will be managed as such, with no additional inputs of nutrients or fertilisers onto this land
- The proposed mitigation measures also address Natural England's concerns with respect to the Portsmouth Harbour SSSI and Lee-on-the-Solent to Itchen Estuary SSSI.
- We recommend that an overarching Biodiversity Mitigation and Enhancement Plan is produced for the entire development that includes an annex setting out the specific measures to be incorporated into each phase of development and reserved matters applications.
- In order to safeguard soil resources as part of the overall sustainability of the development, it is important that the soil is able to retain as many of its important functions and services as possible through careful soil management.

7.22 Network Rail

No objection

- Network Rail will continue to work with the council to consider the feasibility of a new station at Welborne.
- South West Railway will need to be consulted in order to establish if the impact of a bus link with Fareham Station can be accommodated and whether any mitigation is required.

7.23 Hampshire County Council: Highways:

Recommend that conditions and planning obligations be attached to any planning permission that is granted:

- The Transport Assessment has been informed by the use of the Solent Transport Sub-Regional Transport Model (SRTM). This is an approved strategic level model and has been used to inform how traffic flows may alter over time, particularly in response to specific major highway interventions and major development proposals. As with all strategic transport models, caution is required when reviewing the outputs at a detailed local level, and for this reason the Highway Authority also sought a highway assessment utilising a micro-simulation model traffic model (VISSIM)
- The two stage modelling process is considered suitable by the Highway Authority and presents a robust forecast methodology from which to establish impacts and the acceptability of the mitigation.
- The Transport Assessment (and its addendum) also provide a robust forecast of the trip rates from the development on which to assess the future year impacts of Welborne
- In general terms the modelling highlights:
 - There is a reduction in future traffic flow utilising the A334

- between Fareham and Winchester;
 - There are proportionately less vehicles trips across the wider network between the A27 junctions with the M27 (9 and 11),
 - The A32 south of the M27 and the North Hill / Park Lane links see a significant increase of traffic flows
 - Local reassignment within the highway network bordered by North Hill, Park Lane and A32 Wickham Road (termed North Fareham Triangle) leads to proportionate changes to traffic volume along individual links, as well as an overall increase.
- The proposed Junction 10 is considered acceptable in principle to the Highway Authority and its delivery should be secured by condition.
- A contribution should also be secured to facilitate the implementation of the Junction 10 works.
- The Junction 10 proposals include provision of a new roundabout junction with the A32 (referred to by the applicant as Broadway Roundabout) and an east-west link road providing access via two further roundabouts (which the applicant refers to as High Street Roundabout and Welborne Approach Roundabout) into the Welborne development. The proposed junction is considered acceptable in principle to the Highway Authority.
- The development's northern access junction is proposed at A32 Wickham Road / Forest Lane, taking the form of a 4-arm roundabout. The proposed junction is considered acceptable in principle to the Highway Authority.
- The amended eastern arm off the existing A32 Wickham Road / Knowle Road / Chalk Lane roundabout is considered acceptable in principle to the Highway Authority
- A new 4-arm roundabout is proposed off the A32, referred to as the Central Avenue roundabout. The proposed junction is considered acceptable in principle to the Highway Authority. Prior to the implementation of this roundabout junction a left in / left out priority junction is proposed to serve the land east of the A32 following the closure of Pook Lane at the junction with the A32. The proposed junction is considered acceptable in principle to the Highway Authority.
- Whilst the detail of the internal road network is not a matter for determination at this stage, it is necessary to secure certain elements which are integral to the Transport Assessment of this outline planning application. This includes, the alignment and design principles of the principal internal spine road (referred to by the applicant as Welborne Way), the treatment and access arrangements via existing Knowle Road, the geometric layout of the road in proximity to the proposed Secondary School (called Central Avenue by the applicant) and securing the approach to internal road adoption (the Welborne Street Manual).
- School gate congestion/parking is considered to generate health, safety and access issues and therefore the provision of car-free environments around future schools and good planning of routes to schools will provide safer and healthier environments
- Mitigation is required at each of the following off site junctions:
 - A32 School Road / A334 Winchester Road / A32 Hoads Hill
 - A32 Wickham Road / North Hill / Furze Court
 - North Hill / Old Turnpike / Park Lane / Kiln Road
 - A32 Wickham Road / Old Turnpike
 - A32 Wickham Road / Wallington Way / Wickham Road /

- Southampton Road and Broadcut / Wallington Way
 - Delme Roundabout
 - Quay Street Roundabout - (A32 Gosport Road / Portland Street / Quay Street / A27 Western Way / A27 Eastern Way junction)
- The applicant has undertaken an interim assessment to forecast the level of highway mitigation necessary on the local highway network, and the quantum of development which could be occupied, in advance of the implementation of the proposed M27 Junction 10 improvements. All the proposed off-site local highway mitigation schemes need to be implemented in order to accommodate the highway impact of the following development quantum:
 - 1,160 residential dwellings; or
 - 11,250 sqm of employment space; or
 - 4,700 sqm of retail space
- Overall an acceptable minimum level of offsite provision for walking and cycling is being offered, within the constraints of the existing network and the forecast levels of demand upon it, balanced against the need to accommodate other transport modes
- The Public Transport provision is considered acceptable by the Highway Authority.
- The highway infrastructure proposals associated with Welborne include proposed changes and introduction of traffic management measures such as on-street parking controls, speed limits changes, direction signing, movement restrictions and pedestrian crossing facilities. Each of these proposals have been discussed with both Hampshire County Council's Traffic Management team and Hampshire Constabulary's Road Policing Unit and no concerns have been raised with regards the principles of these changes at this stage.
- There are also a range of locations where highway safety schemes are required of which some are within the Winchester City Council area.
- The Framework Travel Plans are considered acceptable and the requirement to implement full Travel Plans, payment of the Travel Plan approval and monitoring fees and provision of a surety mechanism to ensure implementation of the Travel Plan should be secured in a section 106 legal agreement.

7.24 Hampshire County Council: Education:

Comments:

- Early years provision:
 - The LEA is satisfied that the necessary early years provision can be provided:
 - 350 full day care spaces – A total of 2,100 square meters plus outdoor play, parking and access
 - 175 Pre-school places – A total of 800 square metres plus outdoor play, parking and access.
- School Size:
 - The Welborne Plan specifies a minimum of 7 forms of entry for schools, however 9 forms of entry will be required unless a reduction in pupil yield can be evidenced.
- Delivery:
 - The LEA are only able to offer preliminary estimates of the phasing for opening the schools, based on the build-out rates

- previously indicated by the developers
 - The timing of the requirement for the new schools will need to be kept under review and secured within the legal agreement.
 - First primary school – 2022/23 – prior to 500 occupied dwellings based on estimated build out rate that sees 450 completions in 2022/23
 - Second primary school – 2026/27 – prior to 1,600 occupied dwellings
 - Third primary school – 2031/32 - prior to 3,500 occupied dwellings
 - Secondary school – 2029/30 – prior to 2,700 occupied dwellings
- Community Use
 - If the developer proposes to provide additional facilities over and above those otherwise expected for the provision for a school on a school site, the LEA will look to ensure the Academy Trust can make these facilities available for wider community uses through a Community Use Agreement.
 - Where no additional funding is being made available to provide facilities beyond that otherwise expected, the LEA will use reasonable endeavours to ensure the Academy Trust promotes community use of the school sites.
 - It is important to note that grass playing pitches typically provided on new school sites are designed to be of a standard to be suitable for 7 hours of playing time per week. Should there be a need to make grass playing pitches available outside of school hours, it is expected that additional funding will be made available by either the developer or the local authority approving the planning application for the new housing to provide a pitch that is capable of more intensive use
- Location:
 - The precise location of schools at the reserved matter stage will need to be designed to promote active travel and ensure separation from major roads for health and safety reasons. Schools must not incorporate car parking for parents as this does not encourage active travel to school. The location of schools with other community facilities must also be carefully considered to avoid congestion.

7.25 Hampshire County Council (Countryside & Rights of Way)

No objection.

- A number of strategic access improvement projects are proposed which will secure tangible benefits for the public.
- Financial contributions will need to be secured by legal agreement to ensure that the changes to existing public rights of way and all proposed new rights of way are completed prior to the relevant phase of development. The triggers for implementation of the improvements and new rights of way are being discussed with the applicant.
- Upgrades to paths must be in line with HCC Countryside Design Standards.

7.26 Hampshire County Council (Archaeology)

No objection.

- The heritage strategy management plan proposes to preserve the long barrow within an archaeological protection area which would ultimately be incorporated within the Central Park

7.27 Hampshire County Council (Ecology)

No objection subject to conditions.

- The submitted and updated Shadow Appropriate Assessment has assessed the impacts of the proposed works on the nearby designated sites, with appropriate mitigation measures to offset these impacts. Therefore, Fareham Borough Council, as the Competent Authority, can adopt this document.
- The principles of avoidance, mitigation, compensation and enhancement measures are satisfactory.
- Specific details of the way in which the SANG will be prepared, implemented and managed will need to be secured at the Reserved Matters stage.
- The newly submitted biodiversity enhancement strategy is acceptable.

7.28 Hampshire County Council (Waste and Resource Management)

- No objection subject to land being safeguarded and a financial contribution secured within the legal agreement towards the funding of the household waste and recycling centre.

7.29 Hampshire County Council (Flood and Water Management)

No objection subject to conditions.

- The use of deep bore soakaways should only be used after all other options have been investigated.
- Maintenance schedules and details of measures to protect drainage infrastructure to be secured in the legal agreement.

7.30 Hampshire County Council (Extra Care Housing)

- No objection subject to details of the 100 unit Extra Care scheme being secured within the legal agreement if viability allows.

7.31 Hampshire County Council (Library Services)

Comments:

- Since the Welborne Plan was adopted the library service resource strategy has changed and provision for Welborne is no longer sought on site. Residents at Welborne will be eligible to use Fareham library, therefore a contribution of £21,330 is sought towards improving services at Fareham Library.

7.32 Hampshire County Council (Minerals)

- No objection subject to conditions:
 - Construction management plans should include a method for ensuring that mineral resources can be viably recovered during the development and put to beneficial use;
- A method to record the quantity of recovered material

7.33 Hampshire County Council (Sustainability and Climate Resilience)

Comments:

- The application should specifically address long term resilience to climate change.

7.34 Hampshire County Council (Economic Development)

No objection.

- The early delivery of employment space is advocated but must be managed alongside other nearby business parks to avoid saturation of supply.

7.35 Hampshire County Council (Public Health)

No objection.

- The proposed community orchards and allotments are welcomed.
- The mix of retail units should avoid a concentration of hot food takeaways.
- Adequate community facilities should be provided at the village Community Hub in phases 1-3, to ensure capacity before the main community building at the District Centre is provided.
- A greater emphasis on social connectedness is required.
- Signalised crossings are required in all areas of high traffic volume.
- The increased target reduction of car driver trips from 5 -10% is welcomed but could be increased further.
- The travel plan requires further consideration to encourage healthy behaviour changes.
- Health-promoting community facilities should be provided near the community hub.

7.36 Hampshire Fire and Rescue Service

No objection:

- Subject to satisfying the relevant standards and regulations relating to access for the Fire Service.

7.37 Hampshire Constabulary – Crime Prevention Design Advisor

Comments:

- The proposed removal of the current access loop at J10 will result in the majority of traffic accessing or exiting the M27 via the A32 through the new development. High permeability through the development will result in the development being highly vulnerability to crime and anti-social behaviour.

- The park, play space and allotments in the north east of the site will not be subject to a high level of natural surveillance and appear to have been positioned on 'left over' land. The allotments should be moved to a position where there will be a greater degree of natural surveillance.
- Natural surveillance of residential parking and play areas will be required.

7.38 NHS – Hampshire, Southampton and Isle of Wight Clinical Commissioning Group (CCG)

Comments: (from the sixth round of consultation in June 2021):

- 6,000 homes will place both a logistical and financial pressure on the NHS services and infrastructure necessary to meet the healthcare needs of an estimated 14,000 new residents;
- Of the potential healthcare options the CCG and Council have discussed the only option that is capable of being delivered by the CCG is that the first 5,000 residents are to be served by the Wickham Surgery. The next 3,500 patients will be able to utilise the new temporary facility in the Local Centre at Welborne until such time as the main health and wellbeing hub opens. The final members of the population would utilise the new health and wellbeing hub in the District Centre;
- It is noted that the developer currently declines to agree the transfer of healthcare infrastructure assets to the NHS;
- The application seeks to recoup costs through commercial leasehold terms;
- If leasehold terms on an affordable and sustainable basis for the NHS cannot be agreed within the Section 106 legal agreement, then the only practical alternative is the gifting of the assets to the NHS or to allow the CCG to draw from a £4M index linked fund in order to defray its health infrastructure related costs for the development;
- The CCG notes that the developer has agreed to construct a school and will gift this asset to the Local Education Authority. It seems clear from the precedent set in relation to the school that the Council has successfully negotiated terms under the draft Section 106 legal agreement to allow for the transfer of assets. There is no reason therefore why the Council should not equally require the same from the developer in relation to the healthcare infrastructure;
- The CCG has given assurances that it will ensure, via legal agreements with NHS providers or bodies holding assets on behalf of the NHS that all assets, estate or land secured by the NHS via a S.106 agreement is held in perpetuity for the provision of NHS services to the residents of Welborne and the wider Fareham community;
- The CCG understands that the developer is to offer space within the estate it intends to construct for healthcare infrastructure, to any private provider of general practice services or other primary care service private providers, in the event that the CCG is not able to secure provision of similar NHS services within the Welborne;
- We are confident that the Council would not seek to agree a S.106 agreement based on this wholly unrealistic and unwelcome proposal for

the new residents of the proposed development who would, under the Developer's proposals, have to fund the cost of healthcare otherwise available free from the NHS at the point of need.

- The CCG has significant concerns that leasehold negotiations between the developer and prospective occupiers of healthcare estate created under the S.106 agreement may prove to be protracted and potentially fruitless;
- If no meaningful net material contribution is secured from the developer it is highly probable that the CCG will not be able to secure provision of NHS general practice services within Welborne and will instead explore the option of all provision of GP services to the Welborne community being located solely off site and likely at the Wickham Surgery;
- The current outline proposals related specifically to healthcare infrastructure do not have the confidence of the CCG and will not guarantee the provision of NHS primary medical care services from any site(s) within the development;
- However, the CCG remain committed to seeking a way forward through collaborative and constructive discussion with the Council;
- The CCG would wish to expand discussions to incorporate developer contributions towards the related impact of the development of local NHS community physical and mental health service providers, NHS hospitals or NHS ambulance services

7.39 Hampshire and Isle of Wight Wildlife Trust

Objection (from the third round of consultation in March 2019)::

- The temporary SANG strategy will alleviate pressure on Dashwood and Blake's Copse, however the development will still put significant pressure on the woodland and sensitive ground flora within Dashwood.
- Parts of Fareham Common and the Welborne Mile will be discounted due to the noise pollution from the adjacent M27.
- The noise pollution will prevent these SANG from providing a tranquil environment and will therefore not provide a satisfactory alternative to the sensitive coastal locations they are designed to protect.
- The application should therefore provide 100% of the Bird Aware tariff instead of the proposed 49.7% to ensure that the impact on the sensitive coastal habitat is fully mitigated.

7.40 Royal Society for the Protection of Birds (RSPB)

Objection (from the first round of consultation in April 2017):

- Insufficient mitigation is proposed to address the potential impact on the Portsmouth Harbour and Solent and Southampton Water SPAs from increased residential disturbance.
- The RSPB supports the Solent Recreation Mitigation Partnership as the most appropriate mechanism for mitigating recreational disturbance on the SPAs, however the provision of SANGS as mitigation for coastal recreation disturbance is unproven and should be in addition to financial contributions towards the SRMP strategy.

- No discounting has been applied to the SANGS to account for the current formal or informal recreational use of this land in order to determine its available capacity.
- There is insufficient information regarding the maintenance and monitoring of the SANGS in perpetuity.
- The area of SANGS proposed is insufficient and does not meet some of the SANGS quality standards.

7.41 Sport England

No objection.

- The provision of community facilities and a new, on-site community worker to be funded by the development is accepted.
- The commitment to provide pitches to meet the needs and opportunities identified in the emerging playing pitch strategy is welcomed.
- Detailed issues will be considered by Sport England in future Reserved Matter applications.
- The absence of contributions towards swimming provision within the Borough is disappointing.

7.42 The Meon Ramblers

Objection (from the third round of consultation in March 2019)::

- The diversion of Footpath 90 (Kneller Court Lane - through Fareham Common) as the diversion will be detrimental to the walking environment.
- Footpaths within the site should retain their off-road, rural character and shouldn't be diverted onto pavements beside busy roads.
- The developer should provide a link to the Meon Valley Trail from Knowle.

7.43 British Horse Society (BHS)

No objection subject to:

- The incorporation of Pegasus crossings on the new east-west multi-user public right of way to replace the public right of way 88;
- The upgrade of the bridge over the M27 on Bridleway 100 to a bridleway standard at an early stage in the scheme.
- The upgrade of multi-user links from the site to Wickham Common and the north east of the site
- Alternative routes for horse riders from Fareham Common to the bridleways to the north to be explored
- An additional bridleway to connect with the southern part of Footpath Fareham 84 to avoid the existing narrow access would be welcomed.
- Surfacing of bridleways in line with the BHS advisory leaflets
- Off-road links between Knowle and The Meon Valley Trail that avoid Knowle Village would be preferable to Fareham Bridleway 515
- Completion of the bridleway network at the earliest possible opportunity.

7.44 Woodland Trust

Objection (from the first round of consultation in April 2017):

- based on the potential damage to Dashwood and Blakes Copse.
- If permission is granted, the Trust request the following measures:
 - A buffer of at least 100m should be provided between the development and Dashwood/Blakes Copse.
 - The removal of conifer from the Plantation on Ancient Woodland Sections of -Dashwood should be gradual to enable natural regeneration
 - A 15m planted buffer should be provided between Dashwood and the SANGS car park.
 - All veteran trees should be safeguarded with appropriate root protection areas.

INTERNAL CONSULTEES:

7.45 Arboricultural Officer

No objection.

- The settlement seeks to provide significant green space and green streets, which will provide opportunities for new tree planting and landscaping to enable the delivery of the multiple benefits of well-designed and well maintained green infrastructure to the new community.

7.46 Environmental Health (Pollution)

Comments:

Air Quality:

- No objection subject to conditions.

Noise and Vibration:

- The outline construction environmental management plan for works to J10 is noted. Further information will be required with each phase of the development.
- The Household Waste and Recycling Centre should be at least 110m from residential properties to avoid nuisance from noise and odour.

7.47 Environmental Health (Contaminated Land)

No objection subject to conditions.

7.48 Estates

No objection.

- Uninterrupted access to and servicing of the council's properties at Dean Farm Cottages and 70 Kiln Road is required during the construction process. The construction process will need to be addressed by condition to mitigate the impact on residential amenity.

7.49 Conservation

No objection subject to conditions:

Roche Court & Gate Lodge

- The revised layout provides sufficient open parkland to the south of the drive to retain a sense of openness on the approach to the house. Appropriate attention should be given to the layout and treatment of the edge of the housing area.

Dean Farmhouse

- No objection subject to:
 - Retention and re-use of the two 19th century farm buildings, wing walls and gate piers to the west of Dean Farmhouse to be integrated into a new courtyard development;
 - To the north of the farmhouse and garden, provision of 2 storey houses with a front access lane separated from the farmhouse by a treed landscaped strip, private drive and public footpath;
 - Replacement 2 storey buildings in the adjacent courtyard to the west;
 - New buildings directly to the east of the farmhouse should be limited to 2 storey in height.

7.50 Street Scene

- No comments to make at this stage.

7.51 Fareham Housing

Comments: (from the sixth round of consultation in June 2021):

- Around 1,800 new affordable homes would be delivered if the 30% policy requirement (Policy WEL18) is achieved
- Fareham Housing could not support any further reduction in affordable housing provision at the site. Previous compromises have been made around tenure mix and the minimum level of affordable housing (reduced to 10%), to ensure the development is viable;
- The proposed changes could see, on a worst case scenario, the overall affordable housing provision at Welborne go down to 7.3% (approx. 440 units);
- However, it is recognized. that a planning balance may need to be made that acknowledges and de-risks the potential for cost-overrun at Junction 10;
- With different funding streams available via Homes England there could be some potential for further affordable housing to be delivered outside of the s106 requirements, particularly if an Affordable Housing Provider with Strategic Partnership status were to be involved. Although this would be a positive, it would be important that mixed communities are created;
- The priority of the Housing Investment Grant (HIG) review mechanism (for profit exceeding 20% of cost) will be toward the repayment of HIG working on an 80/20 ratio (80% toward repayment of HIG and 20% for the developer). The 80% proportion toward HIG repayment will then come to FBC to be spent on the provision of affordable housing;
- It would strongly be Fareham Housing's preference that flexibility is provided in how any HIG repayment/recycling can be used. However, it is noted that the terms of the HIG funding may prioritise or require the

recycled HIG to go to affordable provision at Welborne and this may be a stipulation from Homes England. It is however important that the concerns and preferences of Fareham Housing are identified at this stage;

- Flexibility to use these funds throughout Fareham Borough (rather than being restricted to being used in Welborne) will provide the Council with the opportunity to provide additional affordable homes where they are needed most and where their delivery can be most cost effective;
- Limiting the recycled HIG money to be spent on affordable provision at Welborne won't necessarily best meet the affordable need in the Borough at that time. Limiting the recycled HIG monies to be spent on affordable provision at Welborne may be difficult/impossible to use on the last (or latter) phases of the development. I.e. if the overall development has been completed or is near completion it is hard to see how using the funds will be possible without buying new homes at open market value;
- Ringfencing recycled HIG for Welborne means that any party using these funds (whether it be FBC or through/via a Registered Provider) will not have any competitive advantage in the bidding process for affordable housing provision;
- If only 10% of the first 3,000 homes are affordable, and the maximum affordable housing in any residential period were capped at 40%, then this may provide an additional challenge to recycling HIG entirely at Welborne
- With the duration of development at Welborne and various on-going requirements for affordable housing considerations around viability, potential over-spend and potential additional affordable home delivery outside of the s106, Fareham Housing welcomes the opportunity for on-going dialogue with the owner/developer in relation to affordable housing matters through a Steering group;
- FBC needs to ensure that the 50:50 tenure split agreed (and which has factored into the viability work) is not subsequently detrimentally distorted or changed by the introduction of First Homes. With the compromises already made on the amount of affordable housing and the tenure mix, it would not be acceptable for the Social/Affordable Rent proportion to be further reduced at Welborne.

8.0 PLANNING CONSIDERATIONS

8.1 The main planning considerations relevant to this application are listed below:

- The legal framework for assessing the application
- Environmental Impact Assessment (EIA)
- Vision for Welborne
- The principle of development
- Key plans and documents for approval
 - The Structuring Plan (along with Parameter Plans and High-Level Design Principles)
 - Infrastructure Delivery Plan (along with Phasing Plans)
 - Detailed Plans for Junction 10 and roundabouts on the A32
- Ensuring comprehensive development
- Areas of land within the Welborne Plan boundary not forming part of the current planning application
- Land included in the current planning application which is located beyond the Welborne Plan boundary
- Phasing / Sequencing

- Governance
- Ensuring Welborne is a distinct new community of a high quality of design
 - o Woodland Character Area
 - o Downland Character Area
 - o Parkland Character Area
 - o Meadowland Character Area
- Green Infrastructure
 - o Structural Landscaping
 - o Green Corridors
 - o The Central Park
 - o Play areas
 - o Sport and Recreation (including allotments)
- Maintaining settlement separation
 - o Fareham Buffer
 - o Funtley Buffer
 - o Knowle Buffer
 - o Wickham Buffer
- Healthcare
 - o Onsite healthcare
 - o Hospitals
- Education
 - o Nursery and Early Years Education
 - o Primary School Provision
 - o Secondary School Provision
 - o Shared use agreement of school facilities
- Transport:
 - o M27 Junction 10
 - o Detail of Junction 10
 - o A32 alterations
 - o Internal road network
 - o Off-site highway mitigation works
 - o Public Transport Strategy
 - o Rail Halt
 - o Pedestrian and Cycle Strategy (including Public Rights of Way & bridleways)
 - o Welborne Street Manual
- Employment provision
- Retail Impact Assessment
- Welborne's Centres:
 - o District Centre
 - o Local Centre
 - o Community Hub
- Heritage
 - o Dean Farmhouse
 - o Roche Court
 - o Impact on heritage assets
 - o Listed buildings close to the site
 - o Crockerhill Mill House
 - o North Fareham Farmhouse
 - o Church of St Francis
 - o Other listed buildings close to the site
 - o Scheduled ancient monuments
 - o Non-designated Heritage Assets

- Ecology
 - o Impacts on the international sites and Appropriate Assessment
 - o SANG
 - o Nationally protected sites
 - o Locally (Non-Statutory) Protected Sites
 - o Notable Habitats
 - o Protected Species
 - o Biodiversity
- Utilities:
 - o Drinkable Water Supply
 - o Waste water disposal
 - o Overhead powerlines
 - o Gas Main
- Household Waste Recycling Centre
- Minerals
- Best and Most Versatile Agricultural Land
- Flood Risk and Sustainable Drainage Systems
- Noise
- Air Quality
- Development viability
 - o The Infrastructure Delivery Plan
 - o M27 Junction 10 Costs and Funding
 - o Community Infrastructure Levy
 - o Applicant's Viability Proposal
 - o Housing Investment Grant
 - o Assessment of the Scheme Viability
- Housing
 - o Market Housing
 - o Affordable Housing
 - o Wheelchair accessible homes
 - o Lifetime Homes
 - o Passivhaus
 - o Custom Build Housing
 - o Specialist accommodation for the elderly
- Planning Balance

8.2 The legal framework for assessing the application

8.2.1 The content of the application is such that the planning consideration covers multiple different parts of legislation that all need to be taken into account. The legal framework is set out below and regard needs to be had to this Framework throughout the consideration of the application.

8.2.2 Section 70(2) of the Town and Country Planning Act 1990 requires the Council to have regard to the provisions of the development plan so far as they are material to the application, any local finance considerations, so far as material to the application, and any other material considerations.

8.2.3 The UK has now left the European Union, and Directives relating to environmental impact assessments and the conservation of habitats and species no longer apply. Regulations made in domestic law continue to apply with some modification where necessary to ensure that the regulations continue to operate correctly outside of Europe. EU cases decided before 31

January 2020 also continue to apply.

- 8.2.4 Local finance consideration is defined as meaning any grant or financial assistance that has been, or will or could be, provided to the authority by a Minister of the Crown, or sum that the authority has received, or will or could receive, in payment of Community Infrastructure Levy.
- 8.2.5 Section 38(6) of the Planning and Compulsory Purchase Act 2004 states:
- "If regard is to be had to the development plan for the purpose of any determination to be made under the Planning Acts the determination must be made in accordance with the plan unless material considerations indicate otherwise".*
- 8.2.6 The Council must take into account any representations made under article 33 of the Town and Country Planning (Development Management Procedure) order 2015.
- 8.2.7 The Town and Country Planning (Environmental Impact Assessment) Regulations 2011 is relevant (which are applicable under transitional arrangements under the 2017 Regulations). Under Regulation 3, the Council shall not grant planning permission unless it shall have first taken the environmental information into consideration.
- 8.2.8 The Town and Country Planning (Use Classes) Order 1987 was amended in September 2020 and re-organised uses into different classes. However, as this application was submitted before September 2020, the Council must determine this application by reference to the uses or use classes before they were changed. However the use class changes will necessitate planning conditions to control this affect.
- 8.2.9 The Conservation of Habitats and Species Regulations 2017 are relevant. Under Regulation 63, the Council may agree to the project only after having ascertained that it will not adversely affect the integrity of the European site.
- 8.2.10 The Planning (Listed Buildings and Conservation Areas) Act 1990 is relevant. Section 66 states *"in considering whether to grant planning permission ... for development which affects a listed building or its setting, the local planning authority ... shall have special regard to the desirability of preserving the building or its setting or any features of special architectural or historic interest which it possesses"*.
- 8.2.11 Local authority duties under the Human Rights Act 1998 and the Equalities Act 2011 pervades across all functions of the Council including the determination of planning applications. The Council's public-sector equality duty is an important consideration. It requires the Council inter alia to have due regard to the need to—
- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;

- (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
- 8.2.12 The Human Rights Act 1998 incorporates the rights set out in the European Convention on Human Rights (ECHR), inter alia Article 8 (right to respect for one's private and family life, including their home), and Protocol 1, Article 1: (Protection of property).
- 8.2.13 As is set out above, the key consideration within Section 38(6) is that the decision should first be in accordance with the development plan unless there are other material considerations. Material considerations include the planning policies set out in the NPPF.

8.3 Environmental Impact Assessment

- 8.3.1 In accordance with the Environmental Impact Assessment (EIA) Regulations, this report has considered the application submission which includes the applicant's Environmental Statement (ES).
- 8.3.2 EIA is a procedure used to assess the likely significant effects of a proposed development upon the environment. The conclusion of the EIA process results in the provision of an Environmental Statement by the applicant. The ES is required to provide the Local Planning Authority with sufficient information about the potential effects of the development before a decision is made on the planning application. The information contained in the ES must be taken into account in deciding whether to grant planning permission and reasons must be given.
- 8.3.3 The ES includes a description of the current environmental conditions known as the baseline conditions, against which the likely significant environmental effects of the development are assessed both during construction and once completed. Each chapter of the ES states which effects are considered significant. In the case of the Welborne development the ES has been refreshed and updated during the consideration of the application. With the documents submitted in December 2020 the applicant provided an EIA Statement of Conformity which has reviewed the EIA work and concluded that the results, the environmental impact identified along with the proposed mitigation remain unchanged. The June 2021 amendments to the application included a further Letter of Conformity which concludes that the findings of the Environmental Impact Assessment continue to hold true
- 8.3.4 As required by the EIA Regulations, the application and the associated ES has been publicised and consulted upon. Where necessary the relevant consultees have been advised of the changes to the ES or where there have been Statements of Conformity submitted. The consultee responses have, therefore, taken account of the relevant parts of the ES.
- 8.3.5 The conclusions of the ES and the two EIA Statements of Conformity submitted in December 2020 and June 2021 are noted and have been considered by Officers in the assessment of the application through this report. It is considered that the applicant has undertaken the EIA process appropriately and adequately. The use of planning conditions and legal

agreement(s) can secure suitable mitigation measures where significant environmental impacts would otherwise occur.

8.4 Vision for Welborne

8.4.1 The Welborne Plan sets out a clear vision for Welborne. It seeks to provide a 21st century interpretation of the long-established garden village principles and redefine them in a contemporary way which provides a response to the specific locality of the site.

8.4.2 The Council's Vision for Welborne is as follows:

"A distinct new community set apart but connected to Fareham, whose spirit, character and form are inspired by its landscape setting.

Welborne will create a diverse and well integrated new community. It will encourage self-containment with a significant proportion of its inhabitants' life needs being accessible within a main centre and smaller neighbourhood centres. It will contain a mix of dwelling types which meet the needs of the increasing numbers of single person households, families, and the needs of an ageing population. There will be a range of accessible new jobs created which contribute towards meeting the employment needs of this diverse new community.

It will have an integrated movement system connecting it with its surrounding settlements and destinations. It will incorporate footpaths, cycle ways, and vehicular traffic in a way that encourages walking and cycling, provides excellent public transport, and feels comfortable and safe to use.

The development will have a distinctive character. Its layout and design will complement local topography, landscape features and historic structures to produce a place that is distinctive whilst responding to its wider context. It will encourage contemporary design in a manner that is flexible and is capable of accommodating change.

It will have an integrated and linked green network of multi-functional open spaces, civic spaces, public open spaces, private outside space, and green routes. The green network will incorporate the site's natural features, hedgerows, tree lines, and woodlands to provide habitat, recreational facilities, to frame new development and to link to the wider countryside.

It will take advantage of natural features, such as hedges/green corridors/woods; it will maximise orientation; incorporate Sustainable Drainage (SuDS); and provide opportunities for local food production. It will aim to meet its own renewable energy needs in a viable fashion, and deal effectively and sustainably with waste. Buildings will be thermally and water efficient. Access to services and a high quality public transport system all within easy walking distance of homes will reduce the need to travel by car.

Socially and economically Welborne will complement rather than compete with the surrounding settlements and it will allow existing residents to benefit from the new facilities."

8.4.3 The following report sets out how the planning application proposals will meet the Vision for Welborne and how Garden Village principles will be secured.

8.5 The principle of development

8.5.1 In 2005 a strategic development area was identified to the north of the M27 and proposed to the South East England Regional Assembly for inclusion in the South East Plan.

8.5.2 The final version of the South East Plan was published in May 2009. The Plan proposed the allocation of a Strategic Development Area within Fareham Borough to the north of the M27 motorway comprising 10,000 new dwellings.

8.5.3 The vision for the new community progressed and was included within the Fareham Borough Core Strategy. Policy CS13 is the Core Strategy policy that relates directly to the allocation of the Strategic Development Area and sets out that an Area Action Plan (AAP) will be produced to inform future applications. When the Core Strategy was adopted in August 2011, it was anticipated that Welborne would accommodate between 6,500 and 7,500 dwellings.

8.5.4 In June 2015 the Council adopted the Welborne Plan as the Local Plan Part 3. The Welborne Plan is a comprehensive document that provides the main policy guidance for delivery of development at Welborne and is essentially the AAP required by Policy CS13.

8.5.5 The Council is currently undertaking a review of the local development plan. The Welborne Plan (local plan part 3) however is not being reviewed at this stage and as such the policies of this plan remain relevant in the determination of this application.

8.5.6 Policy WEL3 of The Welborne Plan allocates the land for the new community to accommodate approximately 6,000 dwellings, 20 hectares of employment land, along with new education and retail facilities, associated infrastructure and open space.

8.5.7 Given the allocation of the site for Welborne through the adopted Core Strategy and The Welborne Plan, the principle of the development is established. The vast majority of the land within the planning application site is within the Welborne Plan boundary. There are some very limited exceptions to this which are explained shortly in this report under the heading "Land included in the current planning application which is located beyond the Welborne Plan boundary".

8.6 Key Plans and documents for approval

8.6.1 The adopted Welborne Plan contains a Policy Map which specifies the location of settlement buffers between Welborne and the neighbouring settlements of Fareham, Funtley, Knowle and Wickham. The Policy Map also sets out the approximate locations of the secondary school, 'Central Park', the District and Local Centres and the Community Hub.

8.6.2 The Welborne Plan also contains the Strategic Framework Diagram (SFD)

which illustrates one way in which the development of Welborne could be approached to accord with the policy requirements of The Welborne Plan. Policy WEL4 of The Welborne Plan expects development to be taken forward on a comprehensive basis ‘...in accordance with the principles of the Strategic Framework Diagram’.

8.6.3 Given the scale of Welborne and the period of time over which the development will be brought forward, the policies of The Welborne Plan require a number of plans and documents to be submitted for approval with the initial planning application at Welborne. A number of these documents are at a ‘high level’ and will set out the broad parameters and expectations for future planning applications and ultimately the development undertaken at the site. Many of these plans and documents form part of the current planning application before Members for approval.

8.6.4 To assist Members, the key documents and plans for approval are summarised here and will be referred to throughout the Officers’ report.

- The Structuring Plan (along with Parameter Plans and High-Level Development Principles)
- Infrastructure Delivery Plan (along with phasing plans)
- Detailed plans for Junction 10 and the proposed roundabouts on the A32 (some drawings of which have been amended by the December 2020 submission relative to the position of the proposed Pegasus crossing of the A32 to ensure consistency between plans).

8.6.5 The Structuring Plan (along with Parameter Plans and High-Level Design Principles)

One of the key documents submitted for approval (and required by Policy WEL4) is a ‘Structuring Plan’. The role of the Structuring Plan is to show the way in which the main land uses and key items of infrastructure will be placed and arranged across Welborne as a whole and the amount of land proposed for each type of use. The Structuring Plan is also required to set out:

- The access points and primary road network, including the Bus Rapid Transit (BRT) route;
- The location of the District and Local centres and the Community Hub;
- The location of Welborne’s schools;
- The main pedestrian and cycle routes throughout Welborne
- The strategic green infrastructure, including the green corridors linking them
- The areas proposed for suitable alternative natural greenspace (SANGS); and
- The location of strategic utilities infrastructure, including for the supply of electricity and disposal of foul water.

8.6.6 Given the large amount of information it contains, the Structuring Plan is supported by a series of ‘Parameter Plans’ each containing a layer of information. These Parameter Plans comprise the following:

- The Boundary Parameter Plan;

- The Access and Movement Parameter Plan;
- The Land Use Parameter Plan;
- The Residential Density Parameter Plan;
- The Building Heights Parameter Plan; and
- The Green Infrastructure Parameter Plan.

8.6.7 The Parameter Plans support the Structuring Plan and focus on the specific elements set out in the six bullet points above. Along with each of the Parameter Plans, the applicant has provided a written explanation of the rationale that informed the approaches taken in each of the plans.

8.6.8 At the time The Welborne Plan was adopted it was recognised that the design process may not be sufficiently advanced to allow the submission of 'design codes' with the first outline planning application. In such a scenario The Welborne Plan allowed for the submission of 'High-Level Development Principles', alongside the Structuring Plan, to describe the design assumptions behind the key elements of the Structuring Plan.

8.6.9 The submitted Structuring Plan is accompanied by a set of 'High Level Development Principles' which are grouped into the following areas:

- Land use;
- Creating and respecting character;
- Density and building heights;
- Green and blue infrastructure; and
- Access and movement

8.6.10 The Structuring Plan (along with Parameter Plans and High-Level Development Principles), form part of the current planning application and are before Members for approval. The submitted Structuring Plan contains all of the information required by Policy WEL4. There are some areas where there are minor differences between the Structuring Plan and the Strategic Framework Diagram and these are discussed in the relevant sections of the following report. The Structuring Plan is considered by Officers to be broadly consistent with the Strategic Framework Diagram.

8.6.11 All subsequent planning applications for parts of the Welborne site shall be consistent with the approved Structuring Plan. The Structuring Plan will be kept under review by the promoters of Welborne and changes to it could be approved by this Council alongside any future planning applications that rely on those changes.

8.6.12 Infrastructure Delivery Plan (along with Phasing Plans)

The purpose of the Infrastructure Delivery Plan (IDP) and Phasing Plans is to set out what infrastructure will be required to support the Welborne development, and when the infrastructure is likely to be needed based upon the likely housing and employment trajectories.

8.6.13 The Infrastructure Delivery Plan and Phasing Plans, which are considered in detail within the following report, form part of the current planning application and are before Members for approval.

8.6.14 All subsequent planning applications for parts of the Welborne site shall be

consistent with the approved Infrastructure Delivery Plan/ Phasing Plans. The Infrastructure Delivery Plan/ Phasing Plans will be kept under review by the developers of Welborne and changes to them could be approved by this Council alongside any future planning applications that rely on those changes

8.6.15 Detailed plans for Junction 10 and roundabouts on the A32

The application drawings include the general arrangement drawings for the new all moves junction 10 of the M27. Detailed drawings are also included for approval to cover the three roundabouts into the site from the A32 along with the alterations to the east side of the existing Knowle Road roundabout.

8.6.16 Part of the work to the A32 not only includes the proposed site access points but also the necessary crossing points over this road to help connect the development on each side of the A32. One such crossing point that has been longstanding in the proposal is the provision of a controlled crossing for both pedestrians and horse riders (referred to as a Pegasus crossing). Since the resolution of the Planning Committee in October 2019 it became evident that there was a discrepancy between the location of this crossing on the parameter plans and the detailed A32 plans. The amended drawings submitted in December 2020 clarify and correct this point so that the position of this crossing is now consistent across all drawings.

8.6.17 For clarity this crossing point is shown at the point of footpath number 102 on the east side of the A32. The location is approximately halfway between the Knowle Road roundabout and the new central roundabout at the northern edge of the District Centre.

8.6.18 Design Codes

Prior to the approval of any reserved matters applications, the site promoter will need to submit 'Design Codes' to this Council for its approval. By way of example, it is anticipated that the 'Design Codes' will address the following aspects amongst others:

- 8.6.19
- The general design principles and standards that will apply across the development area;
 - The design specifications for each character area within Welborne, setting out the key requirements which will ensure each area is distinctive and how they will be differentiated from the other character areas. This will provide guidance and set the required standards for materials, landscaping, the public realm, lighting, street furniture etc for each area;
 - The design and performance specifications for the main circulation routes through the site, including the design of the principal streets, setting out how the plot boundaries, footpaths and cycleways, parking strategy, landscaping and SuDS should be incorporated into a cohesive and holistic design;
 - Illustrations of how the functional requirements such as bin storage, metering and underground services could be incorporated into the overall design;

- Illustrative material to show how the built form could relate to the main open spaces and other green infrastructure resources, including property boundaries, accessways, and landscaping;
- Indicative elevations to show how edges of blocks should relate to the main structuring elements of the plan in terms of height, scale, rhythm, enclosure and materials and;
- Plans which identify the existing landscape features in each area, such as hedgerows and trees and illustrations of how they could be retained and incorporated into the overall design and protected during the construction process.

8.6.20 Design Codes have not been formally submitted to the Council to date and are not therefore before the Planning Committee for approval at this time. The site promoter will however need to submit them for approval before the Council decides any reserved matters application for above ground works.

8.7 Ensuring comprehensive development

8.7.1 At the time of the preparation and adoption of The Welborne Plan the land allocated for development was controlled by multiple land owners. Policy WEL4 of The Welborne Plan requires the development of Welborne to be taken forward on a comprehensive basis, reflecting the delivery and phasing guidelines set out in the Plan and in accordance with the principles of the Strategic Framework Diagram.

8.7.2 Since the Welborne Plan was adopted, the ownership of land within the site has changed and now over ninety percent of the land within the Welborne Plan area is controlled by a single majority land owner. There are however some areas within the Welborne Plan area which are not included in the current planning application, as well as areas included within the application which are not allocated within the Welborne Plan.

8.7.3 There is no definition within the Welborne Plan of what would constitute “Comprehensive development”. The Oxford English Dictionary defines “Comprehensive” as “...including or dealing with all or nearly all elements or aspects of something”. In the view of Officers, to secure comprehensive development at Welborne doesn’t necessarily mean that all of the land within the Welborne Plan Area has to be included within the planning application.

8.7.4 The following section of the report sets out the applicant’s rationale as to why some small areas of land within the Welborne Plan boundary are not included within the current planning application. In addition, Officers have assessed the acceptability in planning terms of undertaking development associated with Welborne on land beyond The Welborne Plan boundary.

8.8 Areas of land within the Welborne Plan boundary not forming part of the current planning application

8.8.1 Boundary Oak School and Albany Farm are not included in the current planning application as there is no development proposed within these areas.

Although these areas fall within the area covered by The Welborne Plan, the Strategic Framework Diagram (which forms Appendix B2 of the Welborne Plan) did not indicate development within either of these areas.

- 8.8.2 There is a small parcel of land between the A32 and Pook Lane to the north of the existing Junction 10 eastbound on slip which has been acquired by the applicant since the submission of the planning application. This area of land contains a number of trees that are covered by a Woodland Tree Preservation Order and is identified in the Strategic Framework Diagram as forming a minor landscape buffer between the A32 and the development to the east. This area is not included within the current planning application.
- 8.8.3 The application sets out that this piece of land does not form part of the planning application on the basis that the application proposes sports pitches to the east of this area (rather than an employment area as anticipated at the time of The Welborne Plan's adoption). The applicant does not believe there is a need for a buffer in this location as it can be provided further east next to the sports pitches.
- 8.8.4 The provision of a landscape buffer further east lessens the importance for this section of land to be included within the current planning application. The fact that this piece of land contains a large number of trees protected by a woodland tree preservation order means that the land would nonetheless informally provide a landscape buffer in addition to the buffer proposed next to the sports pitches.
- 8.8.5 In the view of Officers, the fact that these areas of land do not form part of the current planning application, does not prevent Welborne coming forward on a comprehensive basis as required by WEL4 of The Welborne Plan.

8.9 Land included in the current planning application which is located beyond the Welborne Plan boundary

- 8.9.1 There are areas of land within the current planning application that go beyond the area allocated within the Welborne Plan. These areas are:
- the land to the north of Albany Farm/ Albany Business Centre and east of the Knowle roundabout;
 - land along the M27 corridor from the existing junction 10 east to the Wallington footbridge; and
 - land south of the motorway along the A32 to North Hill.
- 8.9.2 The first point to note is that land south of the motorway along the A32 to North Hill is within the defined settlement boundary of the Local Plan parts 1 and 2 such that the principle for development is acceptable. The merits of the detail of the changes to the North Hill / Furze Court, Wickham Road junction is considered elsewhere in this report.
- 8.9.3 The land along the M27 corridor from the existing junction 10 east to the Wallington footbridge over the motorway is included in the application site. This is within the designated countryside.
- 8.9.4 The land to the north of Albany Farm has been included within the outline planning application and is also within the countryside.

- 8.9.5 Policy CS14 states that *“built development on land outside the defined settlements will be strictly controlled to protect the countryside and coastline from development which would adversely affect its landscape character, appearance and function. Acceptable forms of development will include that essential for agriculture, forestry, horticulture and required infrastructure.... In coastal locations, development should not have an adverse impact on the special character of the coast when viewed from the land or water”*.
- 8.9.6 The infrastructure proposed as part of Welborne includes junction 10 of the M27 (policy WEL 24 refers). Being necessary infrastructure to make Welborne acceptable, junction 10 works are considered to be acceptable in principle as “required infrastructure” within policy CS14.
- 8.9.7 The land to the north of Albany Farm is identified within the application as providing allotments, a park and play area together with two points of access to the land to the east of the A32 and utilities buildings. The application explains that the land is included as it is required to serve the adjacent residential areas. The application also explains that the additional land is required to ensure a suitable density and typology within the residential areas throughout the site.
- 8.9.8 Whilst this road infrastructure, utility buildings plus the allotments and a play area, have been provided outside of the Welborne Plan boundary it is considered that this land would largely remain of an open and undeveloped character creating a buffer between the proposed new road off the Knowle roundabout and the open countryside beyond.
- 8.9.9 The provision of allotments and the proposed play area are considered to be uses that are appropriate in the countryside. It is arguable that the proposed utility infrastructure necessary to serve the Welborne development falls within the term “required infrastructure” within policy CS14. The proposed road, however, would not typically be considered as an acceptable form of development in the countryside as provided for by policy CS14.
- 8.9.10 Notwithstanding the above however, this part of the proposal is not considered to result in an adverse affect upon the character of the countryside and landscape. This part of the application is considered acceptable in the context of and as part of the wider Welborne development and Officers consider that this is acceptable as a departure from the requirements of policy CS14.

8.10 Phasing / Sequencing

- 8.10.1 Policy WEL41 of the Welborne Plan requires initial planning applications to be supported with a detailed phasing plan and Infrastructure Delivery Plan (IDP). The submitted IDP sets out the proposed phasing for the development however the IDP has not been updated such that whilst the chronology remains as submitted the calendar year attributed to each phase will now have slipped.
- 8.10.2 Within their submission the applicant has chosen to use the term ‘Sequencing’ rather than ‘Phasing’. Within this report, the two terms should

be treated as interchangeable in respect of testing the applicant’s proposals against the requirements of WEL41.

8.10.3 The application sets out that the new community at Welborne will be delivered across five main Sequences spanning the next twenty-five years. The Sequences identify the broad areas of the site where construction is expected to take place and the key items of infrastructure that will be delivered. The application proposes that the site will be delivered through a number of “neighbourhoods”. These neighbourhoods are to be delivered either in whole or part by different housebuilders within the Sequences and these are essentially the more detailed stages of the development.

8.10.4 There are some differences in the proposed Sequencing of development when compared to that anticipated within The Welborne Plan. Officers acknowledge that there have been material changes in circumstances since the adoption of the plan and the Examination in Public into the Plan. One of the key changes is the acquisition of the majority of the land at Welborne by the applicant meaning that they are able to deliver the site comprehensively. Furthermore, the more detailed work undertaken on infrastructure costs and interrogation of the housing market, have altered the trajectory of how the new homes will be delivered and the consequential need for the delivery of infrastructure to support them.

8.10.5 The Sequences for Welborne set out within the applicant’s IDP are as follows:

- Sequence 1: 2019/20 – 2023/24
- Sequence 2: 2024/25 – 2028/29
- Sequence 3: 2029/30 – 2033/34
- Sequence 4: 2034/35 – 2038/39
- Sequence 5: 2039/40 – 2041/42

8.10.6 The IDP also provides a projected timeline for the housing delivery on site:

Sequence	Application IDP		
	Period	Years	Units
1	2019-2024	5	690
2	2024-2029	5	1420
3	2029-2034	5	1550
4	2034-2039	5	1500
5	2039-2042	3	840
TOTALS		23	6000

8.10.7 The December 2020 Supplementary Planning Statement provides more detail in the early years of development at Welborne and indicates a slight change in the trajectory of delivery for the start of the development.

Year	Dwellings per year	Cumulative dwellings
2020-2021	0	0
2021-2022	0	0
2022-2023	30	30
2023-2024	180	210
2024-2025	240	450

2025-2026	240	690
2026-2027	240	930
2027-2028	240	1210
2028-2029	300	1510
2029-2030	300	1810

8.10.8 With respect to the delivery of the proposed employment floor space, the application proposes that the construction of the B-Class employment is focused on Sequence one through to three with 15,000sq.m in Sequence one and 45,000 sq.m in the following two Sequences (giving a total of 105.000sq.m). This is significantly earlier than anticipated in The Welborne Plan, which included 25,550 sqm to be developed beyond 2036, which is almost a quarter of the total floorspace.

8.10.9 The implications for this earlier delivery of employment floorspace is discussed in the section of this report regarding Employment Provision. Overall, however, the change in delivery can be summarised as acceptable without harm to the employment offer in the Borough or the wider PfSH area.

8.10.10 In greater detail the applicant's Infrastructure Delivery Plan proposes the delivery of Welborne in the following manner noting, as above, that the calendar years attributed to each sequence will now have changed:

8.10.11 Sequence 1 (2019/20-2023/24):

The first development will mostly be focused to the north of Knowle Road.

Sequence one is to provide the following:

- Approximately 690 homes;
- Commencement of the village centre including:
 - Village Centre Community Building
 - Health Outreach facility using the Village Centre retail outlets
- Commencement of the eastern employment area;
- Construction of the new Junction 10;
- Construction of the new A32 Northern Roundabout;
- Alterations to the Knowle Road Roundabout;
- Undergrounding of overhead power lines;
- Provision of onsite drainage;
- Diversion of water mains (if required for detailed layout);
- Provision of children's play areas within neighbourhoods;
- Delivery of strategic planting;
- Delivery of Dashwood SANG;
- Provision of the northern segment of the main Central Park;
- First Primary School playing fields. (It is noted that the school is shown in sequence 2 but as described elsewhere in this report the detailed delivery of the school has been the subject of ongoing discussion with the Local Education Authority and is now likely to be delivered earlier than sequence 2).

8.10.12 Sequence 2 (2024/25-2028/29):

The second Sequence continues to focus development around the Knowle Road area and the Local Centre including the Former Sawmills Site but also development starts to the west and south of the District Centre. Sequence two provides:

- Approximately 1,420 new homes (2,110 cumulative total);
- Commencement of the rest of the employment area;
- Completion of the village centre;
- Provision of the on-site BRT network;
- Potential opening of the HWRC (as a result of the negotiations on the Section 106 legal agreement with Hampshire County Council (HCC) as Waste Authority, this amenity is likely to come later in the development with a trigger of 3,000 units agreed for the transfer of the land to HCC and for the payment of a contribution for the delivery of the facility);
- Completion of the first primary school (see final bullet point above for Sequence one);
- Day care/nursery provision in the village centre;
- Secondary School site made available for early playing field delivery and access;
- Delivery of Dashwood Park tennis courts;
- Provision of childrens' play areas within neighbourhoods;
- Phased delivery of parts of Central Park;
- Further / continued strategic landscape planting;
- Internal road network delivered to service the neighbourhoods being constructed.

8.10.13 Sequence 3 (2029/30-2033/34):

The third Sequence of development is within the District Centre and to the west of the Central Park and the community hub. Development is also proposed to commence to the north of the Local Centre.

- Development of approximately 1,550 homes (3,660 cumulative homes);
- Construction of the Central Roundabout to the A32;
- Realignment of Pook Lane with new road and infrastructure;
- Second primary school site made available in the District Centre site;
- Provision of Welborne Sports Hub;
- Nursery and pre-school provision in the District Centre;
- Continued Strategic Landscape Planting;
- Provision of pitches north of Funtley;
- Secondary school playing fields;
- Provision of allotments

8.10.14 Sequence 4 (2034/35 - 2038/39):

This fourth Sequence sees the provision of homes along the edges of the site and to the east side of the A32. The third and final primary school is scheduled for delivery in this sequence along with the multi-purpose community building in the district centre. Central Park is completed in this

Sequence of the development along with the delivery of Fareham Common SANG.

- 1,500 homes (5,160 cumulative homes);
- Completion of the district centre;
- Third primary school;
- Child care/nursery in the Community Hub;
- Continued delivery of green spaces, parks, SANGS and Green Infrastructure.

8.10.15 Sequence 5 (2039/40-2041/42):

This is the final Sequence of the development. This includes the area to the very north of the site around Blakes Copse and land to the east of the A32.

- Approximately 840 homes (6,000 cumulative homes);
- Day care/pre-school provision adjacent to Roche Court Sports Hub

8.10.16 Whilst the sequencing for the delivery of Welborne differs from that shown within the Welborne Plan, the Plan acknowledges that given the long build-out period for Welborne that the approach to delivery should be flexible and be adaptive to changes over the lifetime of the Plan and the development delivery. As such the phasing approach set out in The Welborne Plan is not a rigid set of rules against which Welborne must be delivered. Policy WEL41 reflects this approach and requires that the detailed phasing plans and IDP are kept under review for the lifetime of the development with the Planning Authority approving changes as future applications come forward.

8.10.17 In this case and at this time the applicant's IDP is accepted by Officers as an appropriate means of delivering the necessary infrastructure as required by policy WEL41

8.11 Governance

8.11.1 For a development the size of Welborne, the estate management of green and social infrastructure will be key to its long-term success as a Garden Village. One of the key characteristics of earlier Garden Cities, which has contributed to their character, legacy and enduring success, is that they have structures in place for the long-term stewardship of the community's assets. This has recently been acknowledged by the Government as a key principle of the new Garden Communities approach. Undertaken for the benefit of the community to support and sustain the delivery of the collective vision, the community should have a stake in the new development. Management of common (unadopted) areas in perpetuity, design regulation and the regulation of property alterations are recognised as key roles for these stewardship bodies.

8.11.2 Policy WEL35 specifically deals with the Governance and Maintenance of Green Infrastructure. The Policy requires an implementation, phasing and management plan to be submitted alongside a green infrastructure (GI) network plan with initial applications for Welborne. The policy also requires applicants to set out how the GI network will be implemented and maintained

in perpetuity and to identify who will adopt and ultimately have responsibility for maintaining the various pieces and types of GI.

- 8.11.3 Buckland proposes to meet the requirements of WEL35 by placing all GI spaces, including footpaths, cycle paths, bridleways, play spaces, sports pitches, allotments, informal open space; together with all civic facilities such as parks, roads and all other public spaces and buildings that are not passed into the control of Hampshire County Council/ adopted by the Highway Authority, into a garden village trust, rather than offering land and facilities to the Borough Council for adoption.
- 8.11.4 The Welborne Garden Village Trust (WGVT) (as it is proposed to be called), will be responsible for the estate management and stewardship of all the common parts of Welborne and will be established prior to the first residents being on site. Its role will be to:
- Stimulate and support community ethos
 - Encourage residents' participation
 - Co-ordinate the long-term management and maintenance of Welborne's common parts
 - Uphold the Welborne Masterplan and the character and quality of the Garden Village
 - Regulate property alterations
- 8.11.5 The WGVT will be comprised of representatives from Buckland Development Ltd, the Southwick Estate, Welborne Land Limited, Fareham Borough Council, Hampshire County Council and residents' representatives. It will employ a community development worker to encourage residents' participation and use an accredited Managing Agent to manage and maintain the common parts.
- 8.11.6 In establishing the WGVT, Buckland Development Limited as Development Manager, the Southwick Estate and Welborne Land Limited as majority landowner are adopting a proactive, long-term stewardship model that is very different to the management undertaken by a 'typical' private management company with no vested interest in the land. The Welborne Garden Village Trust will be authorised and regulated by the Financial Compliance Authority (FCA) and cannot be sold on. Its decisions will be transparent, with annual accounts available for public scrutiny.
- 8.11.7 An Annual Service Charge will be levied on each freeholder and leaseholder and secured by Deed of Covenant. This charge, levied in addition to statutory Council Tax as typical in many large-scale new developments, will be set by the WGVT in accordance with RICS Service Charge Code. Initially, the WGVT proposes to subsidise the service charge in order to keep charges at reasonable levels but predicts that the costs will be covered by the service charges generated within 20 years. The Trust will also seek opportunities for additional revenue generation to minimise the service charge for residents.
- 8.11.8 Covenants will also be used to regulate property alterations, in addition to any requirement of the Local Planning Authority. A Residents' Charter will set out day to day obligations and restrictions and the WGVT will retain design control through an application and appeal process in order to provide

design consistency across the whole development in the long- term.

- 8.11.9 To further ensure that the design quality of Welborne is not compromised as the development progresses, Buckland Development Ltd as Development Manager will prepare a strategic design code for the whole site. This will act as a design framework, with further design codes for individual neighbourhoods and phases to follow. The design codes are intended to be prepared collaboratively with significant input from FBC and consultees.
- 8.11.10 The legal agreement pursuant to Section 106 of the Town and Country Planning Act 1990, will be used to secure delivery, management and maintenance. It will also include provisions for the unexpected event of the WGVT ceasing to operate or exist so that the management and maintenance of the community can be continued at the expected standard.
- 8.11.11 On the basis of the above, Buckland's proposals for Governance are considered to accord with the requirements of Policy WEL35. They are also closely aligned to the national Garden Village principles.

8.12 Ensuring Welborne is a distinct new community of a high quality of design

- 8.12.1 The Vision for Welborne is for the creation of a *'distinct new community set apart but connected to Fareham, whose spirit, character and form are inspired by its landscape setting.... The development will have a distinctive character. Its layout and design will complement local topography, landscape features and historic structures to produce a place that is distinctive whilst responding to its wider context. It will encourage contemporary design in a manner that is flexible and is capable of accommodating change.'*
- 8.12.2 The Vision for Welborne is one which is shared by this Council and the Site Promoter. There is a very strong desire to ensure that Welborne is a community with its own distinct character, which whilst responding to its surroundings does not feel like any housing development which could be anywhere.
- 8.12.3 The application before Members at present is in outline which means that detailed plans showing exactly what streets will look like, where buildings will be placed, the designs of buildings, etc are not available at this time. Through the outline planning application however, it is imperative that the fundamental 'building blocks' are in place for guiding all the design work which will need follow. The Structuring Plan, Parameter Plans and High-Level Development Principles will play a key role in setting out the fundamentals upon which detailed design codes and work will be based upon.
- 8.12.4 Another element which will play a fundamental role in defining the spirit, character and form of Welborne are the Character Areas which are established through The Welborne Plan and elaborated upon further within the Welborne Design Guidance SPD.
- 8.12.5 The Welborne Plan considers that the site of Welborne will have four distinct

character areas which will guide the master planning process and ensure that the development is strongly influenced by the landscape character of its surroundings. Character areas within Welborne are also intended to ensure that areas within Welborne have their own unique identity within the overarching character of Welborne.

- 8.12.6 The Welborne Plan describes the character areas as: the woodland; downland; parkland and meadowland character areas.
- 8.12.7 The proposed location of land uses together with the density and height of buildings within each of the character areas is contained within the Parameter Plans described earlier in this report and which are before Members for approval.
- 8.12.8 The application also contains illustrative details relating to landscaping, layout of streets and materials which would help define and distinguish the various character areas through the detailed design process. This information is provided at this outline stage to help illustrate ways in which the character areas could be defined and distinguished from each other and to give reassurance that the different characters can be achieved and that quality will be embedded in Welborne.
- 8.12.9 Accompanying the Structuring Plan, the applicant has set out High-Level Development Principles relating to creating and respecting character. These principles state:

“The existing landscape setting will provide the design structure for Welborne. The wider landscape and existing site features will combine to drive four distinct character areas: Woodland, Downland, Parkland, and Meadowland.

Each of the different character areas will have distinct design aspirations regarding land uses, open space network and urban form including residential density and building heights.

The four character areas will be further articulated through the detailed treatment of streets, spaces and green infrastructure where different planting types, arrangements, street sections, colours and building materials can be used to differentiate between areas further”.

- 8.12.10 The following section of the report looks at each of the four character areas and the applicant’s proposals for them.
- 8.12.11 Woodland Character Area

The Woodland character area is located at the north of the site and includes all of the land north of Knowle Road. The land in this area rises to the north and is characterised by its proximity to Dashwood in the north west and Blake’s Copse to the east. The position of these large woodland areas creates a strong sense of enclosure and will be a defining characteristic of this area.

- 8.12.12 In terms of density, the density parameter plan identifies that development in the north and north west sections of the woodland character area (the areas

next to Dashwood) will be lower density residential development of up to 30 dwellings per hectare (dph). Buildings to the south and north east of the northern primary school (together with buildings to the immediate north and west of the Primary School) are proposed at a medium density of up to 35dph and buildings to the north and east of the Local Centre at a higher density of up to 45dph.

8.12.13 In terms of height, the height parameter plan indicates that buildings in part of the northern section (to the east of Dashwood) could be predominantly 2-2.5 storeys and up to 11m in height, with the remainder of the buildings adjacent to the south and south east of Dashwood predominantly 2.5 storeys and up to 11m in height, with up to 35% of the dwellings up to 3 storeys and 14m in height.

8.12.14 Buildings to the north and south of Knowle Road could be predominantly up to 3 storeys and up to a maximum of 14m in height with up to no more than 35% being 4 storeys and up to a maximum of 17m in height.

8.12.15 The Local Centre would be located to the north of Knowle Road on either side of the proposed north-south route through Welborne. The mixed-use Local Centre will be of a higher density and up to 4 storeys in height. A landmark feature such as a clock/bell tower or spire is proposed as part of the main community building in the Local Centre and could be up to a maximum of 25m in height. The Northern Primary School would be located approximately within the middle of the Woodland character area and could be up to 15m in height.

8.12.16 In terms of green infrastructure, the Woodland character area would contain the upper sections of the Central Park and the Welborne Mile SANG (an area of SANG running north-south along the western side of the Welborne development.) There will also be an area of semi-natural greenspace around the north and much of the eastern edges of the site. The Woodland character area would also contain a series of six parks/informal play spaces.

8.12.17 The predominantly low and medium density Woodland character area could be articulated by large clusters of trees with large canopies and streets orientated with views of the woodland areas beyond the site. The density of trees in this area is also likely to be higher than in the other character areas

8.12.18 Downland Character Area

The Downland character area is the largest and most central of the character areas. This area lies between Knowle Road in the north and Dean Farm Estate in the south, with the A32 to Wickham in the east and the Welborne Mile along the western edge. This area is characterised by gentle sloping topography and open chalk grassland.

8.12.19 The land use parameter plan confirms that the Downland character area will contain a range of development uses and densities. The mixed-use District Centre, the highest density area within the site, with development up to 5 storeys in height would be located in the east of the Downland character area

8.12.20 Further high density residential development of up to 4 storeys in height with up to 30% of up to 5 storeys in height would also front onto the main north-

south road through Welborne and the central section of Central Park. The higher density development fronting onto Central Park is in accordance with the Welborne Plan that states that development surrounding the park should be at a higher density to create a defined edge that emphasises the openness of the park itself.

8.12.21 The Downland character area also contains two schools: the Western Primary School, and the combined primary and secondary school site located to the north of the District Centre. Both schools could be up to 15m in height.

8.12.22 The remainder of the Downland character area would be medium density residential development with an area of lower density residential development located along the edge of the Welborne Mile in the west of the site. The Downland character area would also contain the community hub adjacent to the Western Primary School.

8.12.23 In terms of green infrastructure, the Downland character area contains the central sections of the Welborne Mile SANGS and the Central Park, together with land to the north of the combined primary and secondary school, an area of semi-natural green space to the west of the A32 to Wickham and an east-west green infrastructure corridor spanning the full width of the site.

8.12.24 The Downland character area will be characterised by minimal structural planting, clusters of shrubs and areas of open, species rich grassland. The section of Central Park within the Downland character area is likely to have an open character which would widen in the south to provide a setting for the Neolithic Long Barrow. This section of Central Park could also contain species rich grassland which is characteristic of chalk Downland areas.

8.12.25 Parkland Character Area

The Parkland area is the smallest of the character areas. It is located to the east of the A32 Wickham Road and includes all of the land between Pook Lane and the northern edge of the site. Its character is created by the wider landscape of the Wallington Valley and the open Downland beyond.

8.12.26 The land falls south towards Pook Lane and east towards the Wallington Valley, before rising up to Portsdown Hill. The area is enclosed on the western and southern sides by a framework of structural tree planting. There are open views out of the site to the north and east.

8.12.27 The Parkland area differs from the other character areas in that the proposed land use consists of green infrastructure and residential land only. This is partly because this character area is smaller than the other areas and partly because there are two areas of land within this area (Boundary Oak School and Albany Farm) where the existing land use will be retained.

8.12.28 The density parameter plan confirms that all of the housing to the south and east of Roche Court will be low density to reflect the sensitive position at the eastern edge of the site and visibility from the adjacent Wallington Valley. The low-density housing in this location has also been designed to preserve and enhance the adjacent listed building at Boundary Oak School. The Parkland character area contains one area of medium density housing to the north of

Roche Court, in between the A32 and the proposed main north- south road running through this character area.

8.12.29 In terms of building height, the housing along the eastern edge of the character area could be 2-2.5 storeys and up to a maximum of 11m in height. Housing elsewhere in this character area will be predominantly up to 2.5 storeys with an 11.0 m maximum building height to ridge line with no more than 35% of the units up to 3.0 storeys with a maximum building height of 14.0m to ridge line and in locations identified in the Design Code.

8.12.30 In terms of green infrastructure there are three parks proposed within the parkland area. One park is proposed along the south east edge of Boundary Oak School; one to the south east of Albany Farm and one to the north east of Albany Farm. There are two strips of semi-natural green space proposed within this area: one to the east of the A32, which links the areas of retained woodland to create a continuous green strip parallel to the A32 and one along the eastern edge of the parkland area linking up with the park on the north boundary

8.12.31 At the northern end of the parkland area there is also an area of 2.10 hectares (5.2 acres) proposed for allotments.

8.12.32 The parkland character area could comprise a mixture of formal and informal parkland with the pattern of housing in this area taking a more relaxed form than in other character areas.

8.12.33 Meadow Character Area

The Meadow character area incorporates the low-lying land in the southernmost section of the site stretching from Funtley in the west across the A32 Wickham Road to North Fareham Farm in the east. This area provides the natural drainage connection to both the Meon Valley and the Wallington Valley and is characterised by a smaller field pattern and a mosaic of meadows, wetlands and tree cover.

8.12.34 The southern part of the Meadow character area (to the west of the A32 to Wickham) will contain the employment area. The majority of the employment area could be up to 20m in height, however the Building Height Parameter Plan restricts buildings next to the listed buildings at Dean Farm to a maximum of 14m in height. Officers also recommend the incorporation of a planning condition to further restrict the height of any building within 40m of Dean Farm House to no more than 8.5m in height.

8.12.35 In terms of green infrastructure within the Meadow character area there are a series of sports pitches proposed to the east of the A32 (parallel to the M27) referred to as the 'Roche Court Sports Hub', a buffer with Funtley (which also incorporates a cricket pitch), a buffer to the north of the M27, the southern section of the Welborne Mile and the Fareham Common SANGS.

8.12.36 The remainder of the Meadow character area would comprise residential development. The residential development to the south west of the District Centre will be higher density development with development to the north and west of Dean Farm of a medium density.

- 8.12.37 Moving westwards from the District Centre across the Meadow character area the density of residential development decreases, with an area of medium density housing to the north of the western section of employment land and to the south of the Knowle Triangle and residential development to the north of Funtley of a low density.
- 8.12.38 In terms of height much of the residential development within the centre of the Meadow character area would be up to 3 storeys in height with up to 35% up to 4 storeys in height, with the exception of residential buildings next to Dean Farm and fronting some of the road linking J10 to the southern end of the Central Park. Buildings next to Dean Farm would be up to 2.5 storeys with up to 35% up to 3 storeys in height and residential development adjacent to the road linking J10 to the southern end of the Central Park would be up to 4 storeys in height with up to 30% up to 5 storeys in height.
- 8.12.39 Residential buildings in the western section of the meadow character area would be up to 2.5 storeys in height with no more than 35% up to 3 storeys in height. Residential development adjacent to the Funtley Buffer would be 2-2.5 storeys in height
- 8.12.40 The Meadow area also includes land on the western edge of Welborne that will be safeguarded for a rail halt.
- 8.12.41 New green spaces within the meadow area could be of an open character with peripheral planting of hedgerows and large trees with an open tree canopy structure. This area will also incorporate structural planting, a higher proportion of flowering plants and more frequent use of small ponds.
- 8.12.42 Conclusion on ensuring Welborne is a distinct new community of a high quality of design
- Policy WEL2 requires each phase of the development to be well designed and to incorporate development at a range of densities and building heights to create a series of attractive places with different and distinctive characters and that contribute overall to the creation of a varied but cohesive new community with a strong sense of place.
- 8.12.43 Policy WEL6 requires that all proposals for development at Welborne shall clearly demonstrate how they have responded to the landscape setting within which they sit.
- 8.12.44 A combination of the Structuring Plan, the relevant Parameter Plans and the applicant's High-Level Development Principles will ensure that the requirements of WEL2, WEL3, WEL 4, WEL 5, WEL 6, WEL7, WEL8, WEL9, WEL10, WEL11, WEL12, WEL13, WEL15, WEL16, WEL26, WEL28, WEL29, WEL30, WEL32, WEL33 and WEL40 will be achieved.
- 8.12.45 The Structuring Plan, Parameter Plans and High Level Development Principles will in turn inform the Design Codes which are required to be submitted to this Council for approval prior to any Reserved Matters applications being decided.

8.12.46 The plans and documents which are approved as part of this outline planning application will be used in the determination of Reserved Matters Planning applications and will inform the Design Codes.

8.13 Green Infrastructure

8.13.1 The Vision for Welborne, seeks to ensure that *'It will have an integrated and linked green network of multi-functional open spaces, civic spaces, public open spaces, private outside space, and green routes. The green network will incorporate the site's natural features, hedgerows, tree lines, and woodlands to provide habitat, recreational facilities, to frame new development and to link to the wider countryside.'* The provision of an interconnected network of multi-functional green spaces is one of the key means by which the vision of Welborne as a new garden community will be achieved.

8.13.2 Policy WEL2 requires the provision of a connected network of Strategic Green Infrastructure and open spaces that respects and enhances the landscape qualities of the area and meets the needs of the new community.

8.13.3 Policy WEL29 requires initial proposals for development at Welborne to be accompanied by a detailed open space and green infrastructure strategy that identifies the exact location, quantity, nature and quality standards of each type of on-site green infrastructure required. Policy WEL29 also sets out the minimum open space requirements relating to a number of the green space typologies.

8.13.4 A detailed Open Space and Green Infrastructure Strategy was submitted with the application but has not been updated as the information regarding the location, quantity and nature of green infrastructure is contained within the updated Open Space and Green Infrastructure Parameter Plan with additional details contained within the High Level Development Principles (contained within the Structuring Plan Document). Officers consider there is adequate detail provided within these documents such that this element of the proposal is acceptable pursuant to policy WEL29. The future details regarding the changing facilities, storage and parking facilities will be provided within the reserved matter applications.

8.13.5 Policy WEL33 requires initial applications at Welborne to be accompanied by a structural landscaping scheme.

8.13.6 The different types of green infrastructure are considered in turn within the following sections.

8.13.7 Structural Landscaping

As set out above, WEL 33 requires initial planning applications for the development of Welborne will be permitted where they are accompanied by a structural landscaping scheme which identifies how the existing landscape features on and around the site can be strengthened and used to create a unique 21st century model for a new garden community.

8.13.8 Structural landscaping schemes are also required to show how they respond

positively to areas of high landscape quality to the north and east of the site and take into account any material impact on long distance views of the site from Portsdown Hill to the east and across the site from the south.

- 8.13.9 The Welborne Design Guidance SPD also states that strong east-west planting belts (parallel to the contours of the site) are required to help integrate the development into the landscape particularly when viewed from the south and east.
- 8.13.10 The main areas in which new structural planting will be provided are the three east-west links that span the width of the site, and the settlement buffers alongside Funtley, Knowle and Wickham.
- 8.13.11 The provision of structural planting within the three east-west green links and in the area of semi-natural greenspace directly north of and running parallel to the M27 will provide the opportunity for structural planting to be provided in accordance with the Welborne Design Guidance SPD. Details of the precise species/ sizes of plants etc will be provided through reserved matters applications.
- 8.13.12 There are also some areas of retained woodland that constitute structural planting: Dashwood to the immediate north west of the site Blakes Copse to the west of the A32 (north west of the former Sawmills site) and further strips of woodland planting to the east and running parallel to the A32.
- 8.13.13 Whilst much of Welborne is considered to be upon land predominantly of low and medium landscape sensitivity, the adjoining land to the north and east of the site, forms an important part for the setting of Welborne and has been categorised as being of high landscape sensitivity. The proposed areas allocated for structural planting will enable sensitive views of Welborne in particular those from the north, east and south to be protected.
- 8.13.14 The landscape character of the site will change from largely undeveloped agricultural land to built development as Welborne progresses. The provision of structural landscaping will help integrate the development into the surrounding landscape and, in time, will mitigate the impact of the development on wider views. The early delivery of some structural landscaping will ensure the planting has a chance to get established at the earliest opportunity.
- 8.13.15 Officers consider the proposals for structural planning would accord with policy WEL33.

8.13.16 Green Corridors

Central to the vision for Welborne is the requirement for the green and open spaces to be inter-connected by an attractive network of strategic green infrastructure corridors.

- 8.13.17 Policy WEL4 states that the strategic green infrastructure should be provided in accordance with the principles of the Strategic Framework Diagram. Of the five east-west green links contained in the Strategic Framework Diagram, the Structuring Plan contains three. In terms of location, the three

proposed east-west green links are in approximately the same location as shown in the Strategic Framework Diagram: in the north of the site, (along the southern edge of Dashwood); though the centre of the site and in the southern end of the site through Fareham Common.

- 8.13.18 Whilst not explicitly identified as green links on the submitted plans, the proposal does seek to provide extensive lengths of tree lined roads and streets. It is considered that, with suitable design, these will have a dual function in acting as the further two east to west green links. These are not, however, dedicated and segregated green links. Their inclusion alongside the highway will form part of a wider network of integrated routes with a mix of on street routes, routes adjacent to roads and segregated green routes. One of these notable east – west routes is along Knowle Road.
- 8.13.19 Whilst the character of Knowle road will change and development will front this road, the expectation is that there will be an element of activity to the road, within the woodland character area, such that it would have a dual function as a route through the site but also as part of the green link network.
- 8.13.20 Similarly, the east-west route from the safeguarded rail halt land through to the District Centre, north of the Junction 10 works and Fareham Common would function in a similar way.
- 8.13.21 Policy WEL32 states that development at Welborne will be permitted where it provides for an integrated network that connects the various elements of green infrastructure to the site's centres, the residential areas, employment areas and schools.
- 8.13.22 The Green Infrastructure Parameter Plan confirms the location of the main east-west green links. When combined with the perimeter trail, the landscaping proposed alongside two east-west roads within the Welborne development, and the main areas of green space, a network would be created that connects the various elements of green infrastructure to the Welborne's centres, residential areas, employment areas and schools in accordance with policy WEL32.
- 8.13.23 In terms of spacing, policy WEL29 requires the levels of green infrastructure to be laid out so that, wherever feasible and viable every dwelling is within 200m of the primary open space network
- 8.13.24 The application demonstrates that there is only one very small area in the south of the site that potentially would not be within 200m of the primary open space network. It is anticipated that subsequent detailed applications for development in this location would incorporate additional smaller scale green infrastructure such as a pocket park to ensure that dwellings in this part of the site are within reach of green space just not the primary open space network. The wider green infrastructure network would however be easily accessible from this area.
- 8.13.25 Policy WEL32 states that the network of green links need to be attractive multi-functional green corridors that are attractive to a variety of users. The Open Space and Green Infrastructure Strategy illustrates what some of the green links could look like, however the detail is not for approval at this stage

and would be considered in future applications

8.13.26 Policy WEL32 also requires green connections that link the site to adjoining settlements and the wider countryside. The Green Infrastructure Parameter Plan confirms the location of the main green corridors that run east-west through the site and the location of the Welborne perimeter trail. The green east-west links enable movement on green routes from within the site to the edge of the site. The perimeter trail then allows movement on a green route around the edge of the site to link with existing connections beyond the site into the wider countryside. For example, the main east-west link through the centre of the site would connect to an existing off-road, pedestrian and cycle route south into Fareham and the national cycle network either north to Wickham or south into Fareham.

8.13.27 The proposed green connections within the site are considered to satisfy the requirements of Policy WEL32 in terms of location. The detailed layout would be considered as part of the subsequent reserved matters application(s). Links to the adjoining settlements and the wider countryside are considered in more detail together with the pedestrian and cycle strategy and public rights of way within the Transport section of this report.

8.13.28 Central Park

Policy WEL4 requires that the strategic green infrastructure to be provided is in accordance with the principles of the Strategic Framework Diagram. The approximate location of Central Park is also shown on the Policy Map adopted with The Welborne Plan. The location of the Central Park in the submitted Structuring Plan, reflects that shown on the Strategic Framework Diagram. The Structuring Plan shows an additional green link from the north of the park to the northern end of the Welborne Mile.

8.13.29 The Welborne Design Guidance SPD contains a number of recommendations relating to the design and shape of the Central Park: the Central Park should be centrally located and be one large space, rather than a series of smaller connected spaces; it should widen at the northern and southern ends; it should be open and expansive in character and experienced as a single space offering views to the south and east of the site; and it should not be crossed by any trafficked roads.

8.13.30 The Structuring Plan and the Green Infrastructure Parameter Plan confirm that the proposed Central Park, would comply with all of the SPD's recommendations with the exception of not being crossed by any trafficked roads.

8.13.31 The Structuring Plan proposes a road crossing the Central Park. The proposed road would be positioned to the north of the central east-west link green link and to the south of Knowle Road. There are a number of reasons put forward by the applicant in support of this road across Central Park.

8.13.32 The first reason is based on the need to improve accessibility and permeability between the east and the west of the site. Approximately 5,000 residents would live to the west of Central Park and given the location of many of the amenities to the east of the park, an additional road is required

to improve access between the east and west of the site and to prevent the segregation of communities on each side of the park.

- 8.13.33 The second reason is based on safety considerations. Without the road proposed, works or closures of any of the other roads with this part of Welborne would lead to limited routes in and out for emergency vehicles and approximately 5,000 residents. Limited routes across the site would inevitably result in decreased vehicular permeability and could therefore potentially have an adverse impact on the free flow of traffic
- 8.13.34 The road across Central Park would not be designed to take the majority of traffic movements across the site, however it would provide an important alternative route, particularly in situations where the main routes across the site may not be available.
- 8.13.35 The applicant has further suggested that a road across Central Park would also improve the safety of the main green east-west link that crosses the centre of Central Park.
- 8.13.36 Officers acknowledge that there is merit in pedestrian and cycle routes being overlooked where possible to provide natural surveillance and encourage walking and cycling particularly in winter months when hours of daylight are limited or during the night-time period. Whilst the proposed road would be separated from the main east-west green link it would be close enough to provide some natural surveillance and to increase the perception of safety to pedestrians and cyclists using the main east-west green link. Encouraging year-round use of sustainable methods of transport is also in accordance with WEL28 which specifically requires pedestrian and cycle routes to be attractive and of a good quality.
- 8.13.37 Whilst the Welborne Design Guidance SPD seeks to resist the Central Park being crossed by roads, Officers acknowledge the justification put forward by the applicant. The finer detail of the design of the road through the park will be resolved at the detailed design stage of the park consistent with the Structuring Plan design principles. Officers do not believe that subject to an appropriate design, that the single road crossing Central Park is unacceptable.
- 8.13.38 The submitted Design and Access Statement contains a considerable amount of detailed information relating to the potential character, multi-functional nature and variety of amenities that could be incorporated within Welborne Park. These details are not for consideration at this stage and would be considered in future applications. They will however be very important not only in making the best use of this substantial green space but also in developing the community spirit within the new settlement.
- 8.13.39 The Structuring Plan and accompanying High Level Development Principles contains a number of design commitments relating to the character of Central Park in terms of it reflecting the Downland character in which it is set and it will have a significant open, semi-natural character. The Structuring Plan is before Members for approval with this application, therefore the design commitments such as the design of the Park as one continuous space rather than a series of connected spaces, can be secured at this stage

and would inform all future applications relating to Central Park.

8.13.40 Officers consider that the proposals for Central Park accord with the requirements of policy WEL32.

8.13.41 Play areas

Policy WEL29 states that equipped play areas shall be distributed with the intention that all dwellings are within 100m of 'doorstep' play areas, 300m of 'local' play areas and 600m of youth play areas.

8.13.42 The Open Space and Green Infrastructure Strategy submitted with the application confirms that a variety of different play areas would be provided and distributed throughout the green infrastructure network to ensure all residents are in reasonably close proximity to play facilities. The exact location and form of play areas is not for consideration at this stage and would be considered in future reserved matters applications. Details regarding the precise location and design of the play areas will be secured through planning conditions.

8.13.43 Officers are satisfied that the approach to delivering play areas at Welborne will accord with Policy WEL29.

8.13.44 Sport and Recreation (including allotments)

The application proposes provision for indoor and outdoor sport and recreation. In terms of outdoor provision for sport and recreation a total of 18.4 hectares (45.5 acres) of sports pitches would be provided of which 7.15 hectares (17.7 acres) would be provided within the grounds of Welborne school sites. This would be in accordance with WEL29 which states that 18 hectares (44.5 acres) of sports pitches are required, of which 7 hectares (17.3 acres) could be combined with sports pitches within the Welborne school sites.

8.13.45 The submitted Structuring Plan contains four locations for the provision of outdoor sports facilities: a sports hub (named Roche Court Sports Park by the applicant) in the south east of the site (to the north of the M27); a cricket pitch adjacent to the settlement buffer with Funtley, sports pitches combined with some of the school playing fields and sports provision in close proximity to Dashwood at the northern edge of the site.

8.13.46 The proposed provision of a large number of sports pitches in the form of a sports hub, which has been designed to enable efficient management, is supported by the Head of Streetscene.

8.13.47 Environmental Health have also been consulted and have confirmed that they have no objection to the proximity of the sports pitches to the M27, in terms of noise or air pollution. The provision of tree planting along the southern edge of the sports hub will help to provide a visual and noise buffer with the M27.

8.13.48 Pedestrian access to the sports hub across the A32 will be available by a variety of routes. It is anticipated that the majority of pedestrian access to

the sports hub across the A32 will be via a signalised pedestrian crossing.

- 8.13.49 Pedestrian access to the sports hub from Fareham would be available via the new footbridge over the M27 that leads from Broadcut or under the motorway alongside the A32.
- 8.13.50 The location of the proposed cricket pitch as part of the Funtley buffer is considered to be appropriate because it increases the separation between Funtley and built form within Welborne. The applicant's public consultation with residents of Funtley also indicated that there was a desire to have a cricket pitch nearby, therefore the location of a cricket pitch in this location is also in accordance with local aspirations.
- 8.13.51 In terms of the type of sports facilities provided, WEL29 requires: one all-weather pitch; at least 4 full sized tennis courts; and at least one bowling green.
- 8.13.52 The Design and Access Statement submitted with the application indicates that the sports hub could contain: one full sized, 3G artificial turf sports pitch; 6 all-weather tennis courts; a sports pavilion and ten, five-a-side football pitches. The layout is useful as an indication of how the sports facilities may be laid out at these locations, however the exact location of specific sports facilities is not for consideration at this stage and would be the subject of a future reserved matters application.
- 8.13.53 In terms of indoor sports provision policy WEL13 requires the community building to contain an indoor sports hall large enough and with sufficient height to accommodate three badminton courts. The infrastructure delivery plan submitted with the application confirms that the District Centre Community Building would be designed to accommodate community facilities including table tennis and badminton. Furthermore during the negotiations on the Section 106 legal agreement, it has been agreed that the community facility at the District Centre will also provide for short mat indoor bowls.
- 8.13.54 The quantum and type of sports facilities proposed is in accordance with the requirements of WEL29. Sport England have confirmed that they accept the proposed location of indoor sports facilities within the community facility buildings and they endorse the funding of a community worker on the site.
- 8.13.55 Sport England also welcome the applicant and the Council's commitment to use the emerging playing pitch strategy to inform and determine future, more detailed applications for sports provision as the facilities are delivered.
- 8.13.56 While Sport England's response raises no objection to the application, they have advised that they are disappointed that contributions are not being sought towards swimming provision within the borough. The application does not propose any contributions towards swimming provision and there is no policy requirement for this within The Welborne Plan.
- 8.13.57 It is also of relevance to note that according to Sport England's sports facility calculator, the population at Welborne would not be large enough to support a pool, rather it would only require the provision of a proportion of a pool.

The Council currently has no swimming pool projects against which a contribution could be secured and has fairly recently opened the Holly Hill Leisure Centre. Furthermore, the Council is unlikely to have any new pool projects within the Welborne Plan period and as such it is considered that there is no justification to seek a contribution towards a swimming pool.

- 8.13.58 The quantity and delivery of the sports facilities, ensuring also that the facilities will be available for use by residents outside Welborne as well, will be secured through a legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.
- 8.13.59 Policy WEL29 further states that sports provision should be aimed at encouraging active participation in sport by all of Welborne's residents, specifically by making provision for junior sport for all genders and providing sports and recreational facilities aimed at encouraging an active and healthy older population. In accordance with this requirement, the application makes provision for outdoor recreational activities in addition to team sports, including semi-natural green space for walking and running; horse riding and the provision of allotments.
- 8.13.60 The pedestrian and cycle supporting plan confirms that provision will be made for horse riders in the form of several interlinked bridleways. For example, the existing path through Dashwood and along the western boundary of the site is proposed to be upgraded to a bridleway to enable connections north to Mayles Lane and south to a new bridleway that is proposed through Fareham Common.
- 8.13.61 The bridleway along the west of the site would also be connected to a new bridleway that is proposed along the main east-west link through the centre of the site, along the south east part of the Welborne perimeter trail and south to the existing M27 pedestrian bridge. The incorporation of such details at this stage shows how future provision could be secured in line with the submitted Structuring Plan.
- 8.13.62 The application proposes an area of allotments and community gardens to the north of Albany Business Centre. The 2.1 hectares (5.2 acres) proposed slightly exceeds the requirement of Policy WEL29 for 1.95 hectares (4.8 acres) to be provided. The proposed allotments would provide opportunities for Welborne residents to grow their own food and help build social connections in line with Garden Village principles and the Welborne Vision which seek to create a sense of community
- 8.13.63 Third party representation have queried the location of the allotments and suggested they should occupy a more central location. In terms of connectivity to the wider green infrastructure network, the allotments would be linked to the northern, east-west green link and adjacent to a small park (which also links to an area of semi-natural green space and the 10km Welborne Perimeter Trail.) The proposed position of the allotments would therefore be well connected to a multi-use, green infrastructure network as required by policy WEL29. The position of the allotments in the east of the site will also provide a sensitive transition between built form in Welborne and the open countryside to the east.

8.13.64 The quantity and delivery of the allotments, will be secured through a legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990. Officers are satisfied that allotments can be delivered at Welborne in accordance with Policy WEL29.

8.14 Maintaining settlement separation

8.14.1 Policies WEL2 and WEL5 require development to respect and maintain the physical and visual separation of Welborne from the adjoining settlements of Fareham, Funtley, Knowle and Wickham to protect their individual character and identity.

8.14.2 Policy WEL5 identifies the land known as Fareham Common, between the M27 and the rear of existing properties on Kiln Road and Potters Avenue, as a settlement buffer.

8.14.3 The policy states that the width of the settlement buffers adjacent to Funtley, Knowle and Wickham must be at least 50m wide, increasing to at least 75m in the following circumstances:

- when development proposed immediately adjacent to the settlement buffer is greater than 2 storeys or 8.5m in height;
- where noise-generating uses are proposed immediately adjacent to the boundary; or
- where the distance between development in the existing settlements and Welborne would be less than 75m.

8.14.4 Policy WEL5 also states that development within buffers will be resisted to ensure they are consistent with and contribute to the green infrastructure role of the area. This is further strengthened by the Welborne Design Guide SPD which advises that the buffers should be of a semi-natural character without formal structures (such as play equipment) to ensure that they create a transitional green space (para 2.112).

8.14.5 The submitted Structuring Plan, Land Use Parameter Plan and Green Infrastructure Parameter Plan show the locations and widths of the proposed buffers. These are described in more detail below.

8.14.6 Fareham Buffer

Fareham Common would comprise an area of publicly accessible open space, free from development other than the works necessary for the Junction 10 upgrade to an 'all moves' junction, a network of paths and a small car park area off the western side of the Common accessed from Funtley Hill. In terms of location, size and design the proposed buffer at Fareham Common is in accordance with Policy WEL5.

8.14.7 Funtley Buffer

The proposed settlement buffer shown on the submitted Structuring Plan and Parameter Plans, adjacent to Funtley, is consistent with the Welborne Plan Strategic Framework Diagram in terms of position.

- 8.14.8 The building height parameter plan indicates that the nearest residential buildings (north of Funtley) would be 2-2.5 storeys and up to a maximum of 11m in height with the commercial buildings (to the east of Funtley) up to a maximum of 3 storeys and 14m in height.
- 8.14.9 The buffer to the employment land is in excess of the 50m minimum buffer width required by Policy WEL5. The buffer is shown at 65m wide on the Parameter Plans and as such some greater height of building could be permissible in this location. In addition, the detailed design solution for the employment area could be undertaken so as to ensure that the buildings in this location are set beyond a 75m separation distance from Funtley Hill properties.
- 8.14.10 The residential development parameters to the north of the Funtley buffer exceed those permitted by the policy WEL5 for a 50m buffer. The location of the buffer alongside the Funtley recreation ground is such that Funtley buffer would essentially sit alongside an existing open area and could complement the openness between the site and Funtley whereby a separation far in excess of the policy requirement of 75m would actually be achieved.
- 8.14.11 A cricket oval is also proposed within the northern settlement buffer with Funtley on the submitted Parameter Plans. The incorporation of the proposed cricket pitch within the buffer complies with the requirements of Policy WEL5 and the Welborne Design Guidance SPD as the buffer would retain an open and undeveloped character. Furthermore, the cricket oval and buffer sit due north of the existing Funtley recreation ground such that the cricket oval and buffer would further increase the sense of separation when viewed adjacent to the existing recreation ground.
- 8.14.12 Planning conditions are recommended to control the scale of employment and residential buildings in close proximity to Funtley. It is considered that, subject to these conditions and based on the submitted Structuring Plan and Parameter Plans, that the proposed buffer provision is acceptable and the proposal would comply with policies WEL2 and WEL5 of the Welborne Plan.
- 8.14.13 Knowle Buffer
- To the north of Funtley is the village of Knowle. The proposed settlement buffer adjacent to Knowle is consistent with the Strategic Framework Diagram in terms of position and through its incorporation into the Welborne Mile SANG, it is significantly wider than the minimum 50m policy requirement.
- 8.14.14 The building height parameter plan indicates that buildings in the parcel adjacent to the buffer with Knowle would not exceed 11m in height up to the ridge line for the 2.5 storey buildings and a maximum limit of 14m for the three storey buildings. Given that in this location the buffer exceeds the depth of 75m set out in Policy WEL5 the proposed buffer is considered to be acceptable.
- 8.14.15 Wickham Buffer
- The proposed settlement buffer adjacent to Wickham is consistent with the

Strategic Framework Diagram in terms of position and width and includes Blakes Copse.

- 8.14.16 A play space is proposed within the settlement buffer with Wickham along the northern edge of the development site. The incorporation of the proposed play space within the buffer is considered to be acceptable as a consequence of the application describing this as an “informal play space”. The detailed design of the play space would be agreed at the detailed design stage. The dual use of this buffer to include play space is similar in consideration, therefore, as to the cricket pitch in the Funtley buffer.
- 8.14.17 The Wickham buffer is considered by Officers to accord with Policy WEL5.

8.15 Healthcare

8.15.1 Background:

As part of the consultation process for the Welborne Plan the Council consulted with a range of healthcare providers including the Fareham and Gosport Primary Care Trust (PCT) before the creation of the Fareham and Gosport Clinical Commissioning Group (CCG). There were no representations made by the PCT or the CCG at any stage of the plan preparation process nor were any objections to the Welborne Plan received by the Health bodies. As such the CCG (as it had then become known) made no contribution to the Examination into the Welborne Plan.

- 8.15.2 The policies of The Welborne Plan do not require any provision or contributions towards healthcare facilities off-site. Policy WEL14 which is set out below does require the on-site provision of healthcare facilities.

8.15.3 Onsite healthcare

Policy WEL14 states:

Welborne shall include one or two primary care centres of sufficient size to accommodate at least eight GP surgeries in total, in addition to any necessary ancillary primary care uses. At least one primary care centre will be located within the District Centre, with the potential for a second in the Local Centre. The timing of delivery for the primary care centre(s) will be agreed with the Council, and this may involve a phased approach as Welborne is built out.

Space within the District Centre shall also be provided for dental and pharmacy services. These types of services may additionally be located within the Local Centre. The preference is for these services to be accommodated within or alongside the primary care centre(s).

- 8.15.4 The application confirms that the permanent health centre would be scaled to accommodate a range of services including provision for 8 general practitioners, a dentist and supporting pharmacy needs.
- 8.15.5 In terms of location, Policy WEL14 requires at least one of the primary care centres to be located in the District Centre with the potential for a second

one to be located in the Local Centre. Policy WEL14 also states that space within the District Centre will be provided for dental and pharmacy services. The applicant is proposing to provide healthcare services in accordance with the policy requirements.

- 8.15.6 Policy WEL14 states that the timing for delivery for the primary care centre will be agreed with the Council and may involve a phased approach as Welborne is built out. Due to the sequencing of the development the application proposes that there will be a need for healthcare facilities on site before the District Centre is provided therefore a temporary health outreach facility, temporarily housed within a future retail unit in the Village Centre, is proposed in Sequence 1 (2019/20-2023/24) with the larger, permanent facility provided in the District Centre in Sequence 3 (2029/30- 2033/34). There is, however a mis-match between this sequencing from the applicant and the projected timings for healthcare delivery from the CCG relative to the temporary health facility. This matter is considered further below.
- 8.15.7 The CCG initially objected to the Welborne planning application as first submitted on the grounds that the provision of healthcare facilities at Welborne would de-stabilise existing practices.
- 8.15.8 Following the CCG's initial objection to the application the Council met with the CCG to discuss healthcare provision at Welborne. Following this dialogue a joint press statement between the Council and the CCG was released on the 4th September 2017 confirming that residents of the new Welborne Garden Village would have a Health and Wellbeing Hub on their doorstep within Welborne.
- 8.15.9 Given the predicted timescales for the delivery of Welborne over a number of years, the CCG's further response (received in September 2019) was based on the provision of healthcare in the short, medium and long term and is broadly aligned with the agreed joint press statement and the provisions in the Welborne Plan.
- 8.15.10 In terms of the healthcare provision initially provided at Welborne, the CCG's position is that the initial population, approximately the first 5,000 residents at Welborne, could be accommodated either through an extension to Wickham Surgery or by a network of practices. The CCG has confirmed that the Wickham practice has agreed in principle that they can accommodate this additional patient list and that they can source appropriate healthcare professionals to serve this population. The practice would, however, need to expand its premises to serve this increase in patient numbers. As the Welborne population increases above 5,000 it is anticipated that the healthcare needs of Welborne be reviewed as there could be a need for some form of healthcare facility to be provided within Welborne with the provision of a temporary facility at the Local Centre which would operate on site until the main Health and Wellbeing Hub is open at the District Centre.
- 8.15.11 In terms of the provision of these healthcare facilities in the first 10 years, the CCG has previously advised that a new GP practice solely serving the Welborne population would not be sustainable in the short or mid-term. However, it is recognised that space at the District Centre, possibly within a community facility, to deliver other primary care services such as health and

wellbeing services for the Welborne community would be of great benefit. The construction of a flexible space that could accommodate clinical activity would enable the space to be used to facilitate specific clinics, dependent upon the demands of the population. It could also serve as the hub for the delivery of networked Primary and Community Services.

- 8.15.12 Providing flexible clinical space could enable a holistic approach to health service provision for the new community which could include locally commissioned services with nationally commissioned primary care services (ie. Dental; Pharmaceutical and Optometry) to be provided alongside Local Authority; social care; and or public health services.
- 8.15.13 As set out above, the application documents propose that a temporary health outreach facility is proposed to be located in the village centre. The IDP in support of the application indicates delivery of this facility by 690 occupations. Engagement between Officers and the CCG has resulted in the Health Service provider advising the Council that this would be too early and that there would not be a critical mass of population to support such a facility. It is the CCG's position that this temporary facility is not required until after the first 5,000 residents are on site which is nearer to 2,000 occupations. There is, however, broad agreement between the applicants sequencing plans, the IDP and the CCG position on the delivery timings for the Health and Wellbeing Hub within the District Centre at around 3,600 occupations.
- 8.15.14 Since the resolution by the Planning Committee in January 2021 to grant permission the CCG has continued its engagement with Officers over the drafting of the health planning obligations in the Section 106 legal agreement.
- 8.15.15 The CCG has indicated that a three step approach to health at Welborne could be acceptable. These steps would be:
- The first 5,000 residents would be served by Wickham Surgery;
 - The next 3,500 residents would be served by the temporary facility at the Local Centre on the assumption that the developer builds the facility and leases it to the Provider;
 - The remaining new residents (9,400 patients) would register at the Health and Wellbeing Hub in the District Centre along with those from the temporary facility which would close upon opening of the Hub.
- 8.15.16 It has been made clear through discussions with the CCG that whilst the initial population at Welborne may well be serviced by the surgery at Wickham, the Welborne development will not provide any financial contributions to support this.
- 8.15.17 The CCG's preference would be for the onsite Health and Wellbeing Hub to be transferred into the NHS Healthcare estate so that it can run the necessary health services.
- 8.15.18 The applicant, however, takes a different view. BDL is of the view they would retain the freehold on the building(s) and the CCG would need to agree

terms for that building through any lease. If the CCG don't agree the lease terms with BDL, then BDL could seek to secure an alternative healthcare provider to operate the building.

- 8.15.19 The CCG position is that this approach from the applicant fails to recognise the financial pressure on the NHS as BDL seeks to recoup the costs of any NHS estate provision via commercial leasehold terms charged to the NHS providers. BDL however, has expressed the view that GP practices can and do operate in many buildings around the country that are not NHS owned. In these circumstances buildings are rented on commercial terms from a landlord.
- 8.15.20 This is a currently a clear difference between the National Health Service provider for the area and the applicant as to how the health offer at Welborne could be provided and it is expected that negotiations will continue up to and beyond this committee given the projected time of delivery of the Health and Wellbeing Hub at Welborne (at around 3,600 occupations).
- 8.15.21 In assessing the healthcare element of this proposal the Local Planning Authority, in considering the application details, has sought advice from the NHS as the commissioning body for publicly operated health services. The NHS, through the CCG, has provided advice as to whether the applicants arrangements would provide a suitable approach to the development and ensure that appropriate health infrastructure is delivered for NHS providers.
- 8.15.22 The CCG has indicated that, as currently proposed, and in the absence of a financial contribution towards on site healthcare as an alternative, the proposals are unacceptable to them. Then the Health Service would instead revert to working with existing providers, for example Wickham Surgery, to explore the option of all provision of GP services to the Welborne community being located solely within the existing NHS or GP provider estate.
- 8.15.23 Should this situation arise this would clearly conflict with one of the strategic objectives of Welborne in so far as self-containment is concerned. Furthermore, this situation would conflict with the requirements of the Welborne Plan; specifically policy WEL14 as set out above and is a position that the Local Planning Authority could not support.
- 8.15.24 The provision of the Health and Wellbeing hub in the District Centre is due for completion by 3,600 occupations. This is over half way through the delivery of Welborne and is some years into the future. It is unclear how healthcare will be delivered at this time and as such, the Planning Authority is seeking to provide a framework to the negotiations by requiring the s106 agreement to:
- Form a Health Steering Group with the CCG invited to attend by the Council. This steering group would be a non-decision making group, however it would seek to:
 - agree the type of healthcare services to be provided;
 - the scheme(s) of works for the delivery of health infrastructure;
 - timings for delivery; and
 - details of any transfer or lease.

- Require the details of any transfer or lease to be on such terms so as to reasonably enable the CCG and/or its nominated Operator to provide NHS primary and community services for the population of the Development.
- 8.15.25 The detail of the lease as per the paragraph above means that the detailed discussions can continue between the Council, the Owner and the CCG beyond the grant of this planning permission.
- 8.15.26 By having the s106 mandate that any transfer or lease is on such terms so as to reasonably enable the CCG and/or its nominated Operator to provide NHS Primary and Community Services would ensure that the healthcare on site is provided by the National Health Service. This will provide a free at the point of delivery health option for the residents at Welborne.
- 8.15.27 This approach not only meets with the requirements of WEL14 to provide an on site health facility, but it reflects the agreed position between the Council and the CCG from back in September 2017. However, more importantly it would ensure that there is no requirement for the CCG to explore the option of all provision of GP services to the Welborne community being located off site at existing surgeries whilst at the same time not committing the applicant to any specific lease terms.
- 8.15.28 Furthermore, it is also unknown how health services will be delivered in the future. Changes in the delivery of Primary Care Services and advances in technology mean that the CCG are unable to predict the exact space requirements for a new building in Welborne. The CCG do not know at this time how advanced the changes will be and to what extent the impact of digital and technological working will change patient flows.
- 8.15.29 To that end, the provision within the S106 for the future agreement of the scheme of works for the health facility/ies at Welborne will ensure that at the time of their delivery they are the right type, size and scale of facility to match the requirements of the new community.
- 8.15.30 The CCG has previously advised that the current care model indicates that it is possible that the population in Welborne could be large enough to sustain a Primary Care Service in the later phases (from 2040.) However, at this point it is likely that any provision of primary care services would need to be provided by a network of practices and possibly from the on-site health and well-being facility in the District Centre. If the Community health and wellbeing building was constructed to facilitate a mixed use flexible design then it could be possible to expand services within this facility and enable growth in Primary and community services from this location in the later phases of Welborne.
- 8.15.31 The offer by the applicant and as set out in the Infrastructure Delivery Plan is free, serviced land and works to the value of £4,000,000 to cover the cost of the temporary healthcare facility in the Village Centre and the Health and Wellbeing Hub in the District Centre. Policy WEL14 specifically directs the provision of healthcare to onsite locations such that this offer would accord

with the policy.

- 8.15.32 As set out above, the most recent representation from the CCG (received just before this agenda went to print), seeks the transfer of the assets to the NHS estate or for a lease on terms that enable the NHS to provide its services. The applicant's response to the CCG representation and any further progression on the health delivery at Welborne will be provided to Members by means of the written update paper at the meeting.
- 8.15.33 Overall it is considered that the location and quantum of the healthcare facilities proposed at Welborne are in accordance with policy WEL14 and will be secured through a legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.
- 8.15.34 Hospitals
In addition to the onsite healthcare provision comments received have expressed concern at the impact a new community of this size will have on the acute, or secondary health services, such as the emergency department at the Queen Alexandra Hospital in Portsmouth. Reference is specifically made to ambulances queuing to access the Emergency Department.
- 8.15.35 The CCG has advised that the Queen Alexandra Hospital Accident and Emergency department is currently undergoing extensions and alterations to increase its size and capacity. It is understood that the increase in capacity has been provided through NHS capital funding and not through 'developer contributions'.
- 8.15.36 Similar to the engagement with the PCT/CCG at the plan preparation stage, the Council sought to engage with Portsmouth Hospitals NHS Trust during the preparation of and examination into the Welborne Plan
- 8.15.37 In April 2014 a representation was received in respect of the emerging Welborne Plan from Portsmouth Hospitals NHS Trust. The Trust accepted that it didn't see the provision of Welborne as a problem and was looking forward to being able to respond positively to the future health care needs that would arise. In their response the Trust did note however that adequate primary care, including GP provision, should be provided.
- 8.15.38 In finding the Welborne Plan sound, the Inspector stated that *"The Council has undertaken significant consultation with a range of healthcare providers, including the Portsmouth Hospitals NHS Trust who did not submit an objection. No substantive evidence was submitted to demonstrate that the healthcare needs of Welborne residents would not be met"* (para 45). In light of this, there is no development plan requirement for any hospital provision at Welborne or for Welborne to provide any mitigation towards hospital services through a planning policy
- 8.15.39 On receipt of the application in March 2017, a consultation request was sent to Queen Alexandra Hospital however no response was received.
- 8.15.40 In late 2018 two letters of representation were received; one on behalf of

Portsmouth NHS Hospitals Trust (PHT) and one for University Hospital Southampton (UHS). These two letters seek financial contributions of nearly £6,000,000 in total for the delivery of clinical services at both Hospitals. The Trusts state that their need to seek contributions is primarily a consequence of the way in which Government funding is currently provided to the Trusts.

8.15.41 The representations emphasise two justifications for development at Welborne to make a contribution to acute healthcare:

- funding for the hospitals is agreed annually based on the previous year's activity; and
- the annual funding allows for predicted population growth but 'does not include ad-hoc housing developments'.

8.15.42 Paragraph 54 of the NPPF states that LPAs should consider whether otherwise unacceptable development could be made acceptable through the use of planning obligations such as that requested.

8.15.43 As set out above, the tests for obligations are set out in paragraph 56 of the NPPF and reflect those in Regulation 122 of the CIL Regulations. The tests for an obligation are:

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

8.15.44 Whilst the letters from the Trusts have been received late in the process and appear to be at odds with the position set out by the Portsmouth Hospitals NHS Trust at the Welborne Plan preparation stage and examination in public, the impact of planning decisions on healthcare is nevertheless considered to be a material planning consideration. It is necessary therefore, to consider the issues raised and determine whether the development proposal would be unacceptable in the absence of the contributions sought by the Trusts.

8.15.45 There is no specific policy within The Welborne Plan that relates to hospital infrastructure or contributions towards Hospital Services. The representations from both Trusts refer, however, to Core Strategy policy CS20 which seeks to ensure that developments will contribute towards or provide infrastructure or mitigate an impact of a development upon infrastructure. The representations are clear that they do not seek a contribution towards health infrastructure rather it is the impact upon the hospitals through the delivery of the health care service. Whilst the thrust of policy CS20 seeks to secure contributions towards infrastructure, it could be argued that the broad nature of policy CS20 could be material in assessing the Trusts' requests.

8.15.46 Furthermore, the NPPF, in Chapter 8 seeks to promote healthy and safe communities. The NPPF identifies that decisions should "...enable and support healthy lifestyles, especially where this would address identified local health and well-being needs" and "...take into account and support the delivery of local strategies to improve health...of the community" (paragraph

91-92).

- 8.15.47 The first point to note in relation to the Trust representations is that the UK provides its citizens with healthcare on a national basis regardless of district or county boundaries. The funding is collected via central government taxation and distributed locally to provide healthcare. Whilst delivered locally the service is a National Health Service and as such the government has a system to ensure that each area of the country has enough funds to provide the service on the basis of the population it serves. Regardless of where someone lives, they are entitled to receive healthcare on a national basis.
- 8.15.48 Furthermore, the NHS have set out within their consultation that their document titled “Technical Guide to Allocation Formulae and Pace of Change” that the formula used to allocate funding takes account of population growth and is based on an Office for National Statistics methodology.
- 8.15.49 In both representations the majority of the content explains the way in which the hospitals are currently funded. The letters indicate that a quantum of the projected population at Welborne is likely to use the hospitals and increase pressure on the hospital services as a result. A formula is provided with an estimated number of the proposed population at Welborne predicated as being likely to need to use the hospital services. From this estimated number of hospital visits, a cost is attributed and multiplied to provide the suggested contribution.
- 8.15.50 In considering the requests it is noted that the construction of houses does not itself lead to population growth. Officers consider that the need for housing is a consequence of population growth. Furthermore, there is no account in the representations, it seems, for the potential for the population at Welborne to be moving locally around the Borough or adjoining boroughs such that their residence locally is already accounted for by the current services and funding commissioned by the two hospitals. In addition, the cost attributed to the proposed patient trips to the hospital is not considered to be clearly calculated or justified within the representations received.
- 8.15.51 The representations from both Trusts state that “...*although the Trust has plans to cater for known population growth it cannot plan for unanticipated additional growth in the short to medium term*”.
- 8.15.52 The length of time between sites being identified, planning permission being granted, and the houses actually being constructed and subsequently occupied is many years. The amount of residential development coming forward in the Borough, including Welborne, which has not been reasonably foreseeable for a period of years is, therefore, very limited. In fact, as set out above the Portsmouth Hospitals NHS Trust were aware of Welborne at the plan preparation stage and made representations accordingly.
- 8.15.53 Welborne has been planned for more than 10 years and the Council has sought to engage with local Healthcare providers throughout the process; it is noted that there was no record of a dialogue with University Hospital Southampton during the Welborne Plan process due to the fact that the closest hospital for residents of Welborne would likely be the Queen

Alexandra and not University Hospital Southampton. Notwithstanding this, Welborne has been planned since 2009. It is difficult, therefore, to accept that the Hospital Trusts are unable to plan for the growth of the new community given that Welborne is not unplanned, small scale, or ad-hoc growth, rather it is a sub-regional strategic development site to be delivered over many years. The population growth can be forecast using the application details and the planned healthcare interventions can therefore be predicted.

- 8.15.54 Furthermore, since receipt of the representations, in January 2019, the NHS launched its new 10-year plan. This plan sets out how the NHS thinks it can overcome the challenges that the NHS faces, such as staff shortages and growing demand for services. This is to be achieved essentially by doing things differently and at no point does it refer to the need for new developments to provide for healthcare services by means of financial contribution such as that requested by the two hospital Trusts.
- 8.15.55 The representations also suggest that the contribution is needed to mitigate the impact of the development for the next 25 years, yet the two contributions are requested in full prior to development commencing rather than phased during the life of the development to provide for the unanticipated population growth in the years to come.
- 8.15.56 For the reasons set out above, Officers do not consider that the contribution sought by each Trust is necessary to make the development acceptable in planning terms and thus the tests for planning obligations as set out above are not considered to have been met. Furthermore given the adopted policy framework it is considered that in the absence of the contribution, the application does not fail as a consequence as this issue alone would not justify a reason for refusal, which it must do in order to make the contribution necessary to make the development acceptable in planning terms and meet the tests for a planning obligation.
- 8.15.57 Notwithstanding the issues identified within the Trusts' requests and the findings against the request for a contribution, had Officers found differently and agreed with the Trusts' case that a contribution could be justified and be necessary then this is worthy of further consideration and, like the onsite healthcare offer, weighed against other matters in the Planning Balance section of this report.

8.16 Education

- 8.16.1 Welborne is expected to provide for a population of approximately 15,000 residents many of whom will be in families. The creation of the new community will require sufficient new educational facilities to cater for this new population. Policy WEL15 specifically addresses the requirement for primary and pre-school provision at Welborne and policy WEL16 addresses the requirements for secondary education provision.
- 8.16.2 The Welborne Plan sets out that three primary schools are to be provided at Welborne together with one secondary school. The broad locations are identified on the Strategic Framework Diagram with the Secondary School location identified on the policies map within the Welborne Plan.

8.16.3 The Structuring Plan submitted with the planning application sets out the locations for all three primary schools and the secondary school.

8.16.4 Nursery and Early Years Education

Policy WEL15 indicates that the sites identified for the primary schools at Welborne should include space for the provision of nursery services. The policy requires that each of the primary schools should provide dedicated nursery space sufficient for a minimum of fifty pre-school children. The policy also requires that, in addition to the nursery provision at each primary school further nursery provision should be provided within or near to the district centre, local centre and community hub. The supporting text to policy WEL15 indicates that Welborne would generate a need for approximately 350 sessional nursery places.

8.16.5 The Local Education Authority (LEA) has indicated that the projected early years provision at Welborne could in fact generate a need for 525 sessional spaces which would be distributed across a number of sites including 100 place nurseries and 50 place pre-schools. The LEA has also indicated that since the adoption of the Welborne Plan that nurseries and pre-schools are no longer co-located on school sites and as such HCC, as LEA, has advised that the nursery and pre-school provision should be close to but, not within the school sites.

8.16.6 The application as originally submitted in March 2017 intended that the nursery and pre-school provision would be co-located on the school sites as per the Welborne Plan requirement. However, nursery or early years education is generally provided in Hampshire by the private or voluntary sectors such that co-locating nurseries on school sites is not the preferred solution by the LEA as described above. The LEA's position is acknowledged and the applicant has accepted that the nursery and pre-school provision will be as close to the school sites as possible and also located near to other facilities and amenities such as in or close to the three centres at Welborne.

8.16.7 Given that the application originally submitted co-located early years education within the primary school sites, the description of development has been amended to specifically include the provision of nurseries in addition to primary school sites as they are no longer co-located. The detailed location of the nurseries will be determined through the reserved matter submissions in the future. The mechanism to market sites which will in turn secure nursery operators at Welborne will be detailed through the education obligations within the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990. The applicant's Infrastructure Delivery Plan sets out that the proposal will provide for 350 day care or nursery places and these will be provided at the Local Centre, the District Centre, the Community Hub and at the Roche Court sports hub. It is expected that the first nursery would be opened early on in the delivery of Welborne.

8.16.8 Pre-school provision is slightly different from a nursery in that it offers child care in a setting for pre-school aged children and are run by charities, voluntary organisations or businesses. These facilities are often closely

related to schools or within a community building. The LEA has identified that Welborne will need to provide 175 pre-school places (which with 350 nursery places equates to the required HCC 525 places), which is reflected in the Infrastructure Delivery Plan. The mechanism to market sites which will in turn secure the operators of the pre-school provision at Welborne will be secured within the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990

8.16.9 Subject to these aspects being appropriately secured in the legal agreement described above, Officers are satisfied that nursery and early years provision at Welborne will accord with Policy WEL15.

8.16.10 Primary school provision

Three primary schools are to be provided at Welborne. The first will be in the north of the site, on the north side of Knowle Road. The first primary school will now be a two-form entry school (previously it was expected to be a three form of entry) and, according to the advice from the LEA, will need to open at approximately the 500th occupation which differs from the 820 homes set out in the applicant's IDP. At the 500-home level of occupation, the LEA advises that the site is expected to yield adequate numbers to sustain a year R class from the development. To achieve this target opening, the first school site is to be transferred to HCC by the occupation of 210 dwellings which gives enough time for the school to be constructed. The first school would initially open with a year R class only and grow year by year in line with the rates of occupation. The LEA has had detailed discussions with the applicant as part of the negotiations in drafting the Section 106 legal agreement to understand in more detail the actual housing mix and trajectory for delivery so that it can, in turn, predict the yield of school age children and ensure that the schools at Welborne are delivered at the most appropriate time. The LEA can only offer preliminary estimates of the phasing for opening the schools, based on the build-out rates provided by the developers. The legal agreement will secure the programme, the land for the schools along with a contribution paid to the LEA to deliver the schools. The timing of the requirement for the new schools will need to be kept under review and such a mechanism will be secured within the legal agreement to ensure that the education provision is provided at the appropriate periods throughout the development.

8.16.11 The Welborne Plan sets out that the school provision at Welborne shall provide a minimum of seven forms of entry across the site. This would equate to the remaining two primary schools providing a two form of entry school in the west of the development and the District Centre school becoming a three form entry school. The LEA has advised that since the adoption of the Welborne Plan, the development is now likely to require nine forms of entry. Appropriate land can be secured for the possible increase in school forms of entry in the legal agreement should the additional forms of entry be required.

8.16.12 The location of the second and third primary school is to be determined through the delivery programme. The programme and the LEA will determine which is the second and which is the third primary school to be delivered. One of these schools will be located just to the north of the District

Centre. The District Centre school site is to be a combined site with the proposed secondary school. It may be that the two schools will be built and operated separately but by providing a combined site the opportunity is provided for an all-through-school at Welborne.

- 8.16.13 The third primary school is to be located in the west of the development in the vicinity of the Community Hub.
- 8.16.14 The Section 106 legal agreement negotiations have concluded that the site for the second primary school (whichever site that ends up being) will need to be transferred to HCC by 1,510 occupations and the third site will need to be transferred by 3,060 occupations.
- 8.16.15 A three form entry primary school site requires 2.8 hectares (6.92 acres) of land to be provided. The land use budget confirms that the area of land allocated for each of the primary schools accords with the requirements of Policy WEL15.
- 8.16.16 Policy WEL15 also requires each primary school site to be well and safely connected to the green infrastructure at Welborne especially the pedestrian and cycle network. The school sites also need to be located on a bus route. It is considered that the school sites are all located in positions whereby these objectives will be achieved. The submitted Structuring Plan, Green Infrastructure Parameter Plan and Access and Movement Parameter Plan would ensure that there is a strong integrated green infrastructure network and high-quality public transport links.
- 8.16.17 The application aspires to prioritise walking and cycling through the neighbourhoods to encourage self-containment by locating schools close to homes and other local facilities and amenities. This ambition is reflected in the submitted Parameter Plans and the detailed design of the school sites at the reserved matter stage will be the appropriate time to ensure that the final relationship of the schools with the surrounding road and green infrastructure network are detailed.
- 8.16.18 Officers consider that based on submitted school locations on the Structuring Plan and supporting Parameter Plans, that the proposed primary school provision would be acceptable and in accordance with the requirements of policy WEL15.
- 8.16.19 Secondary school provision
- Policy WEL16 provides for the delivery of the secondary school at Welborne. The policy requires a minimum of seven forms of entry (to reflect the primary school provision) for the secondary school and the Policy Map (Appendix B3 of the Welborne Plan) provides the approximate location of the school to be adjacent to the District Centre.
- 8.16.20 As per the primary school provision above the LEA has sought to secure a site suitable in size to accommodate a nine form entry secondary school.
- 8.16.21 It is the applicant's case that due to the proposed housing offer with a suitable mix of one bedroom units and the potential provision of the extra

care units within the 6,000 homes proposed, that the population would not generate the requirements for nine forms of entry to the school. However, notwithstanding this the legal agreement will make provision for the applicant to make the necessary land available to the LEA to enable the delivery of a 9FE school should it be required.

8.16.22 The secondary school site is proposed to the immediate north of the District Centre and is on a combined site with the one of the primary schools which, as set out above, creates the opportunity to provide an all through school. As with policy WEL15, WEL16 requires the secondary school site to be well and safely connected to the green infrastructure at Welborne especially the pedestrian and cycle network and need to be located on a bus route. The Secondary school also needs to be designed and laid out to ensure it is appropriately related to the District Centre.

8.16.23 Policy WEL16 suggests that the delivery would actually be later than that requested by the LEA – towards the end of Sequence three. The LEA has indicated that it is likely to be seven years after the opening of the first primary school. The applicant's IDP puts the secondary school as opening in year eleven of the build programme but also acknowledges that the details will be finalised through the legal agreements and as a result of discussions with the local education authority. The location of the school is considered to be acceptable. The Section 106 legal agreement will ensure that the land for the secondary school is not transferred to HCC before the primary school site at the District Centre is transferred. The land use budget confirms that the area of land allocated for the secondary school accords with the requirements of Policy WEL16.

8.16.24 It is acknowledged within the Welborne Plan that there will be a critical mass of population on site that triggers the requirement for the delivery of the secondary school. The secondary school age children that reside at Welborne before this tipping point is reached will be served by the existing schools within Fareham. The Welborne Plan identifies that these existing schools may need some temporary additional capacity delivered to serve the needs of Welborne residents however the LEA has not sought to secure such provision in their consultation response.

8.16.25 Shared use agreement of school facilities

The Welborne Plan has a requirement for the first primary school, given its opening fairly early in the build programme, to include some capacity for an initial high level of community use in the period before other community facilities have been provided.

8.16.26 The LEA has indicated that the County Council cannot give support to community use agreements for Primary School Facilities at this stage. The agreement to the use of school facilities is at the discretion of the school operator and head teacher. Given that there is no school operator appointed at this stage the LEA cannot commit to the school facilities definitely being available for public use outside of their use for educational purposes. Notwithstanding this point, the LEA has indicated that more often than not the community use of School facilities is supported by the school operator and head teacher because of the income these uses generate for

the school. As such, it is agreed that through the legal agreement the County will obligate to use their best endeavours to secure community use agreements for all the schools when appointing education providers.

- 8.16.27 Whilst the applicant's IDP indicates that by 210 occupations the "Village Centre Community Building" is identified as being completed to support the initial residents at Welborne further work by the applicant in the past year has indicated that this is more likely to be nearer 690 occupations to allow for the more comprehensive delivery of the village centre of which the community building will be a part. As such, whilst a little later than initially envisaged, there may well be appropriate community infrastructure in place still early on in the development at a similar time to the opening of the first school. On the basis that the village centre community building is delivered in the first sequence which will be secured by way of legal agreement, then Officers consider that the community use within the primary school would not be as critical as originally envisaged.
- 8.16.28 Shared use of the secondary school facilities is also required by the Welborne Plan within policy WEL29. The Local Education Authority is more positive regarding the principle of a shared use agreement although only in relation to the all-weather pitch at the school site and not necessarily regarding the grass playing pitches or other school facilities such as the sports hall. The all weather pitch is a facility to be provided over and above the educational requirements of the school. As such the shared use of this facility outside of the school use is acceptable.
- 8.16.29 The County Council has stressed that any community use agreement for facilities provided primarily for educational purposes will need to first be agreed with the school in question (the operating Academy body) and cannot be signed by the Council at this stage on that Academy's behalf. HCC has advised that the 106 agreement cannot stipulate that any future Academy must honour the Community Use Agreement. However, the obligation will require the LEA to use best endeavours to secure the community use agreement.
- 8.16.30 It is accepted that first and foremost the sport and recreation facilities are for the school and educational use. HCC raise concerns regarding the impact that the use of the grass sports field by non-educational users, could have on their condition and quality. It is important to note that grass playing pitches typically provided on new school sites are designed to be of a standard to be suitable for 7 hours of playing time per week. Should there be a need to make grass playing pitches available outside of school hours, it is expected by the LEA that additional funding will be made available by either the developer or the local authority approving the planning application for the new housing to provide a pitch that is capable of more intensive use.
- 8.16.31 HCC also query whether there would be issues associated with pupil and school security with the need for such pitches to be enclosed as part of the school site. These concerns need to be balanced with the fact that the community use agreement would ensure that the sport and recreation facility could be available for public use outside of the school day and extra-curricular periods. As such through appropriate management, it is considered that the community use of the sports facilities could operate (as

they do elsewhere in Fareham and around the County) without risk to pupil safeguarding. Careful management of the sports fields could ensure that they are able to be used outside of educational periods. Furthermore, the community use of the sports facilities at the secondary school could provide an income for the school.

- 8.16.32 It is considered that the use of an obligation similar to those used in the legal agreements elsewhere in the County by the LEA would ensure the best opportunity arises to ensure that adequate sports and recreation facilities are provided for the residents of Welborne whilst at the same time ensuring that this is not to the detriment of the education offer. The timing of the school delivery, the forms of entry, the school site sizes and contributions towards their delivery and the requirement to use best endeavours to secure a community use agreement for each school will be secured through the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990. As such the proposal is acceptable and the scheme is considered to comply with policies WEL15 and WEL16.

8.17 Transport

- 8.17.1 Policy WEL6 requires all proposals for development at Welborne to demonstrate how the design and layout will help to create safe well-connected neighbourhoods and have particular regard for ensuring that proposals maximise opportunities to prioritise pedestrian and cyclist movement across the A32.
- 8.17.2 Policy WEL23 sets out the transport principles for Welborne which seek the delivery of a high quality sustainable transport system including the provision of the BRT service, travel planning to reduce the reliance on the private car, be south facing towards the motorway, ensure that delivery is linked to funding and infrastructure provision as well and mitigating the impacts of traffic off site in surrounding areas.
- 8.17.3 Improvements to the M27 Junction 10 are required by policy WEL24 and the local road impact and site access is addressed by policy WEL25. Policy WEL26 seeks to secure appropriate public transport provision and policy WEL28 provides for walking and cycling. Encouraging sustainable travel is addressed by policy WEL27.
- 8.17.4 In order to fully understand the traffic impacts of the proposal, the applicant has undertaken a twostep modelling process to identify the forecast impact of the proposed development at the fully built out stage. This two stage modelling process has utilised the Sub Regional Transport Model (SRTM) to identify the wider geographic impacts. The SRTM is then used as a foundation for a more local and detailed highway model assessing the junctions and traffic flows in close proximity of the application site. This micro-simulation is referred to in the Transport Assessment as the VISSIM model.
- 8.17.5 M27 Junction 10

In December 2017, the Secretary of State for Transport advised that Hampshire County Council were best placed to be Scheme Promoter for

Junction 10, working with Buckland Development Ltd (BDL) and Highways England to bring the Scheme forward. The provision of Junction 10 to support the development is a critical part of the infrastructure needed to access the Welborne site. In January 2018, the Scheme promoter role was passed from BDL to the County Council.

8.17.6 Hampshire County Council has since been working with Highways England and BDL to progress the design for junction 10 alongside the Smart Motorway Programme which is currently under construction along the M27

8.17.7 Several amendments have been required to the layout as initially submitted by BDL in 2017. The amendments were made to the planning application in December 2018 with further refinements formally submitted in July 2019.

8.17.8 The detail of Junction 10

As part of the development the new M27 junction 10 will include:

- New eastbound off-slip – leaving the existing motorway east of the Funtley road overbridge and heading into the development site north of the M27;
- Retained eastbound on-slip – existing slip-road retained with minor alignment improvements;
- Revised westbound off-slip – existing slip-road point of leaving the motorway is to be retained but the existing loop will be replaced with a straight slip-road into the development site south of the M27;
- New westbound on-slip – The slip-road will commence in the development site south of the M27 at the same location as the westbound off-slip and merge with the M27 east of the Funtley Road overbridge; and
- New linking roads within Welborne – connecting the eastbound off-slip, westbound off-slip and westbound on-slip to the A32 and eastbound on-slip.

8.17.9 As indicated above, the design of junction 10 has been refined during the consideration of the application. When the County Council undertook the role of project sponsor for the junction it adjusted the design as a result. To take account of and overcome the concerns expressed by Southern Gas Networks regarding the position of a proposed roundabout relative to the high-pressure gas main changes were made. Finally, the design has been altered as a result of the outputs from the micro-simulation traffic modelling that has been undertaken as part of the revised transport assessment.

8.17.10 Given that the works to junction 10 are part of the detailed access arrangements for the application, their extent is elaborated further with more detail below:

8.17.11 A new underpass to the M27 is to be created approximately 150m to the

east of Kneller Court Lane. This underpass will connect with the new eastbound off slip and the new west bound on and off slip roads to the M27. The underpass will provide for two lanes of traffic in both directions with the north to south road through the underpass. A pedestrian and cycle way are to be provided on the eastern side of this north-south road alongside the southbound traffic. A roundabout is on the south side of the underpass and will be signal controlled together with the eastbound off slip.

8.17.12 The design for the Junction 10 extends beyond the new slip roads and underpass and includes the necessary connection of these new slip roads to the A32. The new north-south road described above is the first part of this connection which connects to a roundabout at its northern end. This roundabout has four arms providing access into Welborne and the east-west road linking to the A32. The road linking towards the A32 would be a dual carriageway road running parallel to the M27 and will link to a new three arm roundabout on the A32.

8.17.13 A third roundabout is proposed in the middle of this dual carriageway east – west road linking from Junction 10 through to the A32. This four-arm roundabout will provide access to the south into the employment area and north into the District Centre. Two crossing points for pedestrians and cycles are proposed along the dual-carriageway road as Toucan crossings with shared use paths on both the north and south sides.

8.17.14 Policy WEL24 requires a series of improvements to create an all moves junction 10 as part of the Welborne development. The motorway and trunk road network is managed by Highways England.

8.17.15 Highways England has now confirmed that the design of the junction is acceptable in principle and that the proposed arrangement of roundabouts, link roads, underpass and slip roads is acceptable and safe. As such this part of the proposal is considered to be acceptable and compliant with policy WEL24. A planning condition is proposed in the recommendation to limit occupation on site to 1,160 dwellings and an associated level of commercial floor space until the junction 10 works are delivered.

8.17.16 Previously the wording of this condition related to the floor areas permitted but the drafting incorporated the word ‘or’ which could be construed as meaning that the floor areas stated in the planning condition were exclusive, when in fact they are not. The condition is amended in this report and clarifies that all of the floor areas stated in the condition were tested in combination through the ES and Transport Statement.

8.17.17 A32 Alterations

The access to the Welborne development will be via three new roundabout junctions constructed along A32 Wickham Road and alterations to the existing roundabout at Knowle Road.

8.17.18 The northern most of the three roundabouts is proposed at the junction of the A32 and Forest Lane. This roundabout is located approximately 330m north of the existing Knowle Road roundabout and will have a 56m diameter. The roundabout is offset to the west of the existing (north – south) A32 with part of the existing road being retained to form a service road to

the existing dwellings on the east side of the A32 between Forest Lane and the Former Sawmills site entrance

- 8.17.19 The eastern arm of this new roundabout will connect to Forest Lane. The western arm will link to one of the main north-south link roads within the Welborne development. This north-south road links through to the Local Centre and onwards to the District Centre and the M27 at Junction 10. Pedestrians are provided for at road level with uncontrolled crossings across the western, northern and eastern entry and exit arms of the roundabout. Footway and cycleway links will be provided to the south from this junction.
- 8.17.20 The existing four arm roundabout at the junction of Knowle Road will have the eastern arm modified to provide access to the development land on the east side of the A32. The new access road to the east will be provided as a single carriageway with flared two-lane entry to the roundabout. All other approaches to the roundabout will not be altered from their existing arrangement. Chalk Lane will meet the new eastern access road at a simple T junction with the new access road having the priority. Pedestrians are provided for with road level uncontrolled crossings across all entry and exit arms, while a signalised crossing will also be provided due south of the roundabout (the Pegasus crossing) which is described in the pedestrian and cycling part of this report
- 8.17.21 Approximately 550m south of the existing Knowle Road roundabout, a new four arm (67m diameter) roundabout junction will be provided on the A32. The western arm will provide access to a road within the Welborne development which serves the secondary school and the northern part of the District Centre. The eastern arm serves development east of the A32. Pedestrians are provided for at road level with uncontrolled crossings over the western, northern and eastern entry and exit arms of the roundabout. A signal-controlled Toucan crossing (as described in the pedestrian and cycling section of this report) will also be provided on the southern arm and midway between this roundabout and the roundabout proposed to the south (called the Broadway roundabout by the applicant).
- 8.17.22 The final roundabout is the southernmost access to Welborne and is the linking roundabout between the A32 and the new all moves Junction 10 of the M27. The western arm will provide access to the east – west link road with onward connections to the all moves M27 Junction 10 together with access to the District Centre, employment areas and the western areas of the development.
- 8.17.23 A “by-pass” lane is proposed on the east side of this roundabout for traffic travelling south and accessing the M27 junction 10 eastbound. This allows for peak period eastbound motorway traffic to pass the roundabout without delay, supports the proposal in being a south facing development and allows the junction to operate within capacity.
- 8.17.24 Pedestrians and cyclists will be catered for by the provision of shared use facilities adjacent to the west side of the A32 and a toucan crossing over the A32.

- 8.17.25 South of Broadway roundabout the A32 is proposed to be dualled which would prevent the provision of a pedestrian crossing in this location.
- 8.17.26 The introduction of this roundabout will require the closure to vehicles of the existing junction of Pook Lane with the A32, on safety grounds. The proposed new roundabout will allow vehicles from the south wishing to reach the eastbound M27 on-slip to undertake movements in a safer arrangement than currently exists.
- 8.17.27 In the interim period between the construction of this roundabout and the one immediately to the north, it will be necessary to maintain access to Roche Court / Boundary Oak School, which is currently served via Pook Lane. It is proposed that this will be provided via a temporary left in / left out junction to be provided in the general area of this roundabout, which will connect to a new access serving Roche Court and Boundary Oak School. Once this roundabout is completed the eastern arm of this roundabout will serve the east of the development and the temporary access can be removed.
- 8.17.28 Policy WEL25 requires improvements to the A32 to accommodate the increase in traffic and to achieve a satisfactory access to Welborne as well as creating an appropriate gateway to the development. Consideration is given to the success of the access proposals in being a suitable gateway to the development below when they are considered in the context of the internal road network and the experience of users travelling around Welborne.
- 8.17.29 Regarding the test in the policy that the new A32 access points must be able to accommodate the increase in traffic and to achieve a satisfactory access to Welborne, the Highway Authority has confirmed that the A32 access arrangements are acceptable.
- 8.17.30 Internal road network
- Welborne will incorporate a hierarchy of street types to ensure that there is a suitable network of routes through the site to facilitate vehicle movement as well as the safety and legibility of routes for pedestrians and cyclists. The hierarchy of streets will comprise Primary, Secondary and Tertiary roads and reflects the requirements of the Welborne Design Guidance SPD.
- 8.17.31 The primary routes will be the main arterial routes through the development. The primary road network will consist of the main roads such as the north-south link described earlier.
- 8.17.32 Secondary streets will consist of local distributor roads such as the loop road to the western side of the development and the roads north of Knowle Road and east of the A32.
- 8.17.33 The detailed design of the internal street network (across the whole hierarchy) is not for determination at this stage, however it is to accommodate all modes of transport where necessary - walking, cycling, cars and buses - and ensure that homes, jobs, shops and community

facilities can be easily reached by its residents. Streets will be well designed, generously proportioned and provide an attractive setting for new homes as well as providing a range of convenient walking and cycling routes connecting homes to local facilities, centres, schools and open spaces.

- 8.17.34 Regarding the internal road network at Welborne, policy WEL25 of the Welborne Plan seeks to secure:
- Access from the A32 which will be a gateway to Welborne as well as being suitably designed to accommodate the increased traffic flows; and
 - A main north to south route through the site.
- 8.17.35 Accesses into the site from the A32 are all by means of roundabouts. These access points are part of the detailed plans for consideration. The roundabouts all provide for safe access to Welborne and will be located at key positions such as the District Centre and the northern roundabout at the junction of the A32 and Forest Lane. Alterations are also proposed to the existing Knowle Road roundabout on the eastern side.
- 8.17.36 The location of the roundabouts will provide access to Welborne in a way that they will each act as gateway locations into the garden village. The southernmost two roundabouts provide views into and access into the District Centre which will provide the opportunity, through the detailed design, for areas of higher density, and built form which could include gateway entry buildings. Similarly, the southernmost roundabout will service the employment area which could provide for gateway feature buildings.
- 8.17.37 The main north to south route through Welborne is required by policy WEL25. It extends from the District Centre northwards between the Central Park and the A32 connecting to the existing Knowle Road at the location of the Local Centre.
- 8.17.38 The applicant has proposed that this main north-south road is designed as a 30mph road, to be part of the BRT bus route with side roads accessing housing parcels off it. The applicant has indicated that it will carry a similar volume of traffic to the A32. The distribution of the traffic along this road in this manner is such that the applicant proposes that there is no requirement to dual the A32.
- 8.17.39 The Highway Authority has required confirmation from the applicant, through detailed micro-simulation modelling of the traffic flows, that the main north-south route through Welborne can operate as an alternative route to the A32. This modelling work was necessary to understand the likely flows and movements along the A32 and whether the proposed access arrangements and treatment of the A32 are suitable to accommodate the development proposed.
- 8.17.40 Following the submission of further information, the Highway Authority has accepted the flows along the main north to south route are likely to be similar to the A32 and as such the distribution of traffic is considered appropriate.

8.17.41 The detailed design of the main north-south link through Welborne is identified by the highway Authority as crucial to ensure the access and A32 operate as modelled. Whilst the finer detailed design of the north-south link will follow in future applications, it is recommended that the design parameters for the north-south route are established early and secured by a suitably worded condition as part of the recommendation. This will ensure that the road is designed with sufficient capacity to operate as intended through the traffic model.

8.17.42 Off-site highway mitigation works

The Welborne Plan, Policy WEL25, requires delivery of, or funding towards seven identified junctions on the local road network and any other junctions or local roads that may be affected by the detailed transport modelling. The seven specific junctions identified in the Welborne Plan are:

- A32/A334 Fareham Road, Wickham
- North Hill/Kiln Road/Old Turnpike/Park Lane
- A32 Wickham Road/North Hill/ Furze Court
- A32 Wickham Road/Wallington Way/Southampton Road
- Delme Roundabout A32/A27
- A27/A32 Quay Street Roundabout; and
- A27 Railway Station Roundabout.

8.17.43 Within the application Transport Assessment and Road Safety Report, the other identified junctions and highway aspects identified for mitigation are:

- B2177 Southwick Road / Boarhunt Road / Shoothill Crossroads
- A32 School Road / B2177 Southwick Road Crossroads
- Hoads Hill
- Parking along the A32 Wickham Road
- A32 Wickham Road/Broadcut Roundabout
- A32 Gosport Road to the south of Quay Street Roundabout
- Funtley Hill Improvements
- Highlands Road

8.17.44 The above locations of off-site mitigation and highways safety works are set out below in a broadly geographic arrangement moving from locations north of Welborne southwards:

8.17.45 *A32 School Road / B2177 Southwick Road Crossroads*

This junction is on the east side of Wickham within Winchester City Council's district. There have been a number of collisions at this junction relating to the turning movements out of the B2177 Southwick Road, particularly the turn onto the A32 northbound. This has been raised by the Highway Authority and addressed in the road safety report.

8.17.46 The proposed works to the junction includes refurbishment of all road markings and provision of high friction surfacing. Improvements to signage and dragons teeth road markings are also proposed.

8.17.47 *B2177 Southwick Road / Boarhunt Road / Shoothill*

The application Road Safety Report submits that on site observations of the junction suggest that the drainage system at the crossroads is not functioning adequately. Existing road markings have also been worn out and existing raised white surface on the carriageway was seen to be overrun by turning vehicles. The application proposes to improve the existing drainage, renewal of road markings, installation of traffic islands and both minor approach arms and widening the existing kerb alignments at entries and exits.

8.17.48 *A32/A334 Fareham Road, Wickham*

The junction is within Winchester City Council's district, at the foot of Hoads Hill on the south side of Wickham.

8.17.49 Winchester City Council has recently granted a planning permission for development off the eastern side of this roundabout and work has now commenced on site. The proposals for the roundabout have taken account of Welborne in the improvement design solution.

8.17.50 As Welborne is intended to be 'south facing' regarding traffic flows, the proposals reduce the flared approach to the roundabout. The proposal also provides a continuation of the A32 Hoads Hill cycle route by transferring the cycle lane to a shared use path west of the junction, therefore bypassing the roundabout itself. Furthermore, to provide for pedestrians an uncontrolled crossing has been added north-west of the A334 southbound bus stop.

8.17.51 *Hoads Hill*

There are accident records related to vehicles turning into residential properties on the western side of the A32, partly as a result of confusion caused by the southbound climbing lane. The proposal seeks to remove the climbing lane, decrease the speed limit and to provide a new cycle lane on the west side of the A32.

8.17.52 *A32 Wickham Road/North Hill/ Furze Court*

The removal of the existing roundabout is proposed and this is to be replaced with a traffic signalised junction. If no improvements are undertaken at this junction, it is forecast to operate over capacity in 2036

8.17.53 The introduction of signals will allow for safer pedestrian crossing movements at the junction, promote the A32 Wickham Road as the primary route through phasing and allow for the provision of bus priority in the light cycle for southbound services. As the road space required for the signalised junction is less than the roundabout, a bypass lane for North Hill can also be created.

8.17.54 The A32 north and south approaches to this junction are signalised with dedicated straight ahead lanes and right turn lanes. A no right turn movement from North Hill into either Furze Court or A32 southbound will be introduced at the signals. Traffic can continue northbound and come

back round the southernmost roundabout serving Welborne and travel southbound on A32 Wickham Road; The Highway Authority is satisfied with these junction improvements.

8.17.55 North Hill/Kiln Road/Old Turnpike/Park Lane

For this junction it is proposed that green light time is optimised to those arms of the junction with the greatest flows, namely Kiln Road and North Hill. This adjustment of the light timings also served to discourage additional vehicle flows on Old Turnpike and Serpentine Road. The Transport Assessment modelling shows that even without Welborne that by 2036 this junction will operate over capacity. With the junction enhancements proposed as a result of Welborne the junction remains over capacity, but the impact is no more severe than without Welborne, in fact the junction operates more efficiently with the Welborne related improvements than without.

8.17.56 Welborne will have a significant impact on this junction, which is acknowledged in the transport assessment and by the Highway Authority. In addition to the junction improvements, the Highway Authority is also seeking a financial contribution for further future wider network improvements that will better manage the traffic through this junction.

8.17.57 Changes to parking along A32 Wickham Road

Capacity improvements have been proposed by the applicant along this section of the A32 Wickham Road which involves removing or reducing the impact of on street parking supply through the installation of parking restrictions along both sides of the road. This will result in unencumbered travel for both directions along the road. The reduction in parking is to occur outside the commercial premises. The application submits that there is adequate space on these commercial properties for vehicles to park. The Highway Authority concurs with this approach.

8.17.58 In order to reduce the impact of parking spaces to passing traffic in front of the residential buildings between Old Turnpike and The Potteries, it is proposed to reduce the available footway width to a minimum standard and provide indented parking bays on the western side. The kerb line on the eastern side can be relocated to allow for minor carriageway widening if a wider footway on the western side was desired. This would result in a 5.5m carriageway width and allow vehicles to travel in both directions without restriction from parked vehicles.

8.17.59 The Highway Authority has identified that level differences in this location may be restrictive, but the principle of the work is accepted.

8.17.60 A32 Wickham Road/Wallington Way/Southampton Road

At this junction it is proposed to formalise the approach lanes and produce additional lane flares at the junction. Improvements have been proposed for the Wickham Road northbound approach with formalisation of the approach lanes to have one lane for each direction of travel.

8.17.61 *A32 Wickham Road/Broadcut Roundabout*

The Highway Authority has raised safety concerns over lane discipline and higher southbound approach speeds at the roundabout. The submitted Road Safety Report suggests that the large geometric design of the roundabout and lack of adequate road markings along the circulatory carriageway may encourage such behaviour. The application therefore proposes to add road markings to guide vehicles around the roundabout and from the inside/outside circulatory lanes to their exit lanes

8.17.62 In addition to the above the application also seeks to discourage traffic from using Old Turnpike. The submission seeks to remove the dedicated left filter lane between the A32 Wickham Road and Old Turnpike just after exiting from the above roundabout junction.

8.17.63 *Delme Roundabout A32/A27*

The submitted Transport Assessment identifies that Delme roundabout will operate over capacity with the development in place and following construction of Junction 10 of the M27. This same roundabout is forecast to operate over capacity in future years without Welborne.

8.17.64 The Highway Authority is of the view that the impact of Welborne on this junction is likely to be significant. The applicant has proposed an improvement scheme for the roundabout which would address the impacts resulting from the development at Welborne. The Highway Authority is however seeking a financial contribution towards the implementation of a wider scheme of mitigation and remodelling works.

8.17.65 This contribution can be secured within the legal agreement pursuant to Section 106 of the Town and Country Planning Act 1990.

8.17.66 *A27/A32 Quay Street Roundabout*

The transport assessment forecasts that this junction will, like Delme, operate over capacity in 2036 with Welborne. The Highway Authority is seeking a financial contribution for works to this junction.

8.17.67 *A32 Gosport Road to the south of Quay Street Roundabout*

The Highway Authority has raised road safety concerns with regards to rear shunt collisions between vehicles and cyclists at the petrol station access along this A32 stretch. The following improvements along this section are suggested: renewal of existing road markings; provision of an advanced lane sign on the existing footbridge parapet to provide clear information to drivers and therefore improve lane discipline. The Highway Authority is satisfied with this position.

8.17.68 *A27 Railway Station Roundabout*

Modelling indicates that this roundabout will operate within capacity following the development at Welborne and therefore no mitigation is required. The Highway Authority is satisfied with this conclusion.

8.17.69 *Funtley Hill Improvements*

The Walking and Cycling Strategy has identified the need to provide a shared-use path along Funtley Hill to link the southern end of the Welborne Mile to Fareham Common via the existing M27 underpass in order to link Public Rights of Way and SANG provision either side of the M27.

- 8.17.70 Carriageway narrowing will be required to accommodate the shared-use path in the area of the Funtley overbridge. This will reduce Funtley Hill to one lane of travel for both directions. In order to manage vehicle conflict over the one travel lane, it is proposed to introduce one-way travel with northbound traffic required to give way to vehicles from the opposite direction.

8.17.71 *Highlands Road*

Enhanced cycle lane measures are proposed along Highlands Road. This would provide for a continuous cycle route between the site and Henry Cort Community College, taking account of existing provision and available carriageway space

- 8.17.72 The Highway Authority has spent many months negotiating the offsite mitigation works with the applicant. All the works are considered justified and necessary to mitigate the impacts of the traffic generated by the development. As such the Highway Authority raises no objection and in turn the proposal is considered to accord with policy WEL25.

8.17.73 Public Transport Strategy

Policy WEL26 of the Welborne Plan addresses the provision of public transport services at Welborne. The Welborne Plan is clear that the site wide public transport strategy will be through an extension to the Bus Rapid Transit (BRT) service linking the site to Fareham rail station and either complementing or extending the current BRT Eclipse service.

- 8.17.74 BRT is a high-quality bus-based transit system that delivers fast, comfortable, and cost-effective services at regular frequencies and connects with other transport hubs. BRT is able to avoid the causes of delay that typically slow regular bus services, like being stuck in traffic and queuing to pay on board.

- 8.17.75 The submitted Public Transport Strategy sets out that throughout Welborne there will be a series of both BRT and general service bus stops provided. The application indicates that the BRT will enter the site towards the south east, off the A32 via a proposed bus lane/bus gate to the south of southernmost roundabout serving Welborne. The route would continue north through the employment area and pass through the District Centre. From the District Centre the route would head west and loop north crossing Knowle Road before turning east on the south side of Dashwood to the Local Centre. From the Local Centre the BRT service will continue south back to the District Centre before leaving Welborne at the southernmost roundabout serving Welborne and heading south on the A32.

- 8.17.76 The internal design of the site will allow for the provision of bus stops at regular intervals along this route and will place the majority of, people in Welborne within approximately 400m of a bus stop. It is noted that the BRT route broadly on the Access and Movement Parameter Plan and the submitted Structuring Plan follows that identified on the Strategic Framework Diagram within the Welborne Plan.
- 8.17.77 Whilst the land to the east side of the A32 is not proposed as part of the BRT route, the road infrastructure is to be designed to accommodate bus traffic should other services be extended into this part of the development.
- 8.17.78 On leaving Welborne the identified route for the BRT is down the A32, up North Hill, along Park Lane and into the town centre via Osborn Road South and along West Street.
- 8.17.79 At peak periods the Public Transport Strategy sets out that in order to maintain a high frequency of service the BRT could call at Fareham Railway Station only as the alternative transport hub. In off-peak periods it could be that the service will also call at the Bus station; in peak periods a stop along West Street would ensure connectivity for users with the bus station by way of a short connecting walk for onward bus travel.
- 8.17.80 The submission also sets out that whilst Fareham Bus Station does provide onward connections to key local destinations, the majority of these are also accessible by rail via Fareham Railway Station with shorter journey times. Consequently, for passengers of the proposed BRT service wishing to make onwards connections as part of a longer journey, the railway station may be a more desirable destination.
- 8.17.81 The return route from West Street back to Welborne would be to head north up Trinity Street to Park Lane, North Hill and the A32 into Welborne.
- 8.17.82 As specified within the Public Transport Strategy document that accompanied the planning application, the proposal for the Welborne BRT service is to operate seven days a week, from approximately 6am to 11pm at a frequency of one bus every ten minutes.
- 8.17.83 The submitted Public Transport Strategy sets out that during the early years of the development, it is forecast that three buses will be required to maintain the desired frequency of service. Post completion of Sequence 1 (the first five years), it is proposed that a total of four vehicles can sustain the BRT service onwards. A one-way journey time of approximately 15 – 20 minutes is forecast, which includes a three-minute recovery time per vehicle at the end of each journey.
- 8.17.84 The provision of the new BRT service will inevitably have an impact on existing bus services that operate along the A32 between Wickham and Fareham. Criterion ii) of policy WEL26 seeks to ensure that Welborne has appropriate links to existing services such that the impact upon these services requires further consideration.
- 8.17.85 The 69 Service operates between Fareham and Winchester with its route

along the A32. Based on the submission, the forecast demand for Service 69 to be generated by the implementation of Welborne can be accommodated within the capacity on the existing Service 69 and in fact the additional patronage generated by Welborne would be a positive impact upon this service.

- 8.17.86 Service 20 currently operates one bus an hour in each direction between Fareham and Wickham via Knowle on weekdays and Saturdays. The applicant's public transport strategy identifies that the service 20 route currently operates with over 65% available capacity in both directions on both weekdays and on Saturdays.
- 8.17.87 It should be noted that whilst this route has available capacity for occupants of Welborne, it is not considered that it will generally be a preferred option for passengers travelling to and from Fareham Town Centre. Service 20 is seen to be a less desirable route due to its indirect nature in comparison to the proposed BRT route, given that only future residents of the north-western corner of the site will be located in proximity to this service. However, it will offer the opportunity for some future residents to travel by this mode at certain times of the day.
- 8.17.88 Hampshire County Council as the Highway Authority raises no objection to the proposed Public Transport Strategy. The Public Transport Strategy sets out that a subsidy is required in the early stages of the development to support the BRT service until the critical mass of a population is achieved to make the service self-sustaining. The provision of this subsidy and a commitment to ensure that the BRT service provision is delivered is to be secured through the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.
- 8.17.89 On the basis that the BRT service is provided in accordance with the proposals set out in the Public Transport Strategy and is suitably secured through the legal agreement, the proposal would be acceptable and in accordance with policy WEL26 of the Welborne Plan.
- 8.17.90 Rail Halt
- Notwithstanding the Public Transport Strategy for Welborne being BRT focused, Policy WEL26 also requires the planning application to provide the space to accommodate a future rail halt at Welborne.
- 8.17.91 The western side of Welborne is adjacent to the existing Fareham to Eastleigh line and the policy requires that land should be provided for a new rail halt unless it is demonstrated that it is not technically viable or feasible to deliver such a facility in the plan period.
- 8.17.92 Policy WEL42 specifically seeks to safeguard land for specific developments. Where, due to viability or other reasons, any development or facility required by the Welborne Plan that cannot be commenced within the main phase of development will have adequate land within the Welborne site safeguarded for the intended use. Any safeguarding will apply until the commencement of main phase five after which safeguarded sites may be released for alternative uses after the submission of clear

justification that the intended development for that land is not viable or likely to be viable within the remaining Plan period or that it is no longer required for the development. WEL42 is the mechanism under which the land for the potential future rail halt can be secured.

- 8.17.93 In 2017 Network Rail undertook a study on behalf of the Council, to investigate the feasibility of providing a new station on the Eastleigh to Fareham line to allow the Welborne development to be connected to the rail network. This study identified four possible locations along the existing line where a station could feasibly be located. Of the options each one was assessed for a station to be provided on the single-track arrangement as it currently exists and also with a dual track arrangement.
- 8.17.94 The preferred option in the feasibility study locates a potential station site to the south western corner of Welborne due north of Funtley. This option is the most favourable given that it is located adjacent to the Welborne development site and will allow the station to be integrated with Welborne and interrelated to the future transport strategy for Welborne. The cost for this station is estimated to be between £68m and £78m for a twin tracked, two platform station. The first phase of the station, a single platform using the single track is estimated to cost between £17m and £19m. The land identified as a rail halt in the application parameter plans reflects the location and the identified site size for this preferred option.
- 8.17.95 Third party comments have expressed concern at the potential for a rail station to lead to parking in existing roads in Knowle and Funtley, especially given that the preferred option in the feasibility study doesn't provide for as much parking as some of the other options considered.
- 8.17.96 At this stage the study is providing only some early indication of the feasibility for a station at Welborne. The detailed design stage is where parking requirements would be worked through should a station proposal be delivered at Welborne. At that stage the quantum and arrangement of parking could be properly considered in accordance with the relevant parking standards.
- 8.17.97 The preferred location adjacent to the western edge of Welborne, due north of Funtley, does provide a good opportunity to ensure that any rail travel offer is well related to and ties into the existing Welborne public transport strategy as well as reflecting the possible location for a rail service as per policy WEL26.
- 8.17.98 The applicant's Public Transport Strategy and the Welborne Plan are clearly directed towards the BRT service and there is no requirement within the Welborne Plan for the applicant to provide a railway station at Welborne. However, whilst there is no requirement for a train station to be provided at Welborne, the safeguarding of the land under policy WEL42 will be secured and will ensure that should the delivery of the station for Welborne become viable and feasible during the development then the land is suitably safeguarded for that purpose. The land safeguarded for the rail halt is identified on the Land Use Parameter Plan. As such the proposal is considered to accord with policies WEL26 (in so far as rail travel is concerned) and WEL42.

8.17.99 Pedestrian and Cycle Strategy (including Public Rights of Way (PROW) & bridleways)

Walking and cycling through Welborne and off site from Welborne is addressed through policy WEL28. This policy seeks to provide for a network of routes for the new community supplemented by a series of good quality local pedestrian and cycle links. Specifically, the policy seeks to ensure:

- i) good pedestrian and cycle links to Fareham town centre and the railway station;
- ii) links to surrounding communities and countryside,
- iii) attractive links across the A32 to encourage east-west movements; and
- iv) attractive links to off-site schools which will serve the development.

8.17.100 There are a number of routes through the site proposed by the applicant and existing paths that are identified to be upgraded.

8.17.101 Public Footpath No.86 currently runs north to south from Funtley through the location of the Welborne Mile and on through Dashwood. The application proposes to upgrade this footpath north of Knowle Road and through Dashwood from a public right of way to a Bridleway. This will allow for further onward links to the north of Knowle and to the Meon Valley footpath networks.

8.17.102 Public Footpath 88 currently runs east to west through the Dean Farm Estate. This footpath is proposed to be diverted slightly north into the new east – west link which will be a segregated route from the highway and will be a new multi-user right of way. This route will also cross the A32 north of the district centre school site by means of a Pegasus crossing and continuing to the eastern edge of the site and connecting to Footpath 103. Footpath 103 is to be diverted around the east of Albany Farm. To the south of Footpath 103 running north to south along the eastern site edge of the site is Footpath 101. This footpath is to be upgraded to a bridleway down to the M27 footbridge over to Wallington and into Broadcut.

8.17.103 East of Funtley and north of the motorway is the current Footpath 89. This footpath links Funtley with Kneller Court Lane which itself is a public footpath (number 90).

8.17.104 Footpath 89 is proposed to be diverted to the south side of the M27 and into the Fareham Common SANG. This is primarily as a result of the junction 10 works and the necessary closure of Kneller Court Lane (Footpath 90) at its northern end. With the closure of the northern part of Kneller Court Lane, the southern section is proposed to be retained as a right of way and continue to link with the diverted Footpath 89 and to Kiln Road from within Fareham Common SANG.

8.17.105 Representations have been received suggesting that footpath 90 should be closed at the Kiln Road end given the poor visibility onto Kiln Road and to better improve the access for the dwelling at 83 Kiln Road. Given the reduction of vehicles using footpath 90 (Kneller Court Lane) and its

incorporation into the path network of the Fareham Common SANG, the proposed retention of the path at the southern end where it adjoins Kiln Road is considered acceptable. Hampshire County Council as the Highway Authority has not sought to close this path as a result of the proposal.

- 8.17.106 In the very west of the site the existing right of way number 85 may need to be diverted in the future should the Welborne rail halt be delivered. The footpath currently runs though the land safeguarded for this provision. In the event that the rail halt is not delivered HCC has secured the re-surfacing of this path.
- 8.17.107 The east – west footpath on the north side of the M27 that runs through Hellyers Farm is to be retained and unaltered and no changes are proposed to the north – south path that sits within the Welborne Mile from the edge of Funtley up to Knowle Road.
- 8.17.108 It is considered that the on-site footpaths retained, enhanced and created are acceptable in creating the good quality network of routes through the site. In addition to these routes it is noted that the applicant also proposes a circular route around the site perimeter that would come forward as part of the Green Infrastructure proposals. It is anticipated that this route would extend to some 10km (6.21 miles) in length when fully completed. This would further add to the permeability through Welborne and the choice of high quality walking and cycling routes to the benefit of the new community and wider borough population.
- 8.17.109 Heading south through Welborne and into Fareham town there are three proposed main routes. In the west there will be a route through Fareham Common to Kiln Road. The route to Fareham Common will be either via the new junction 10 underpass or via Funtley Hill. A Toucan crossing is proposed at Kiln Road opposite Maylings Farm Road.
- 8.17.110 It is proposed to provide an on-road cycle route from Kiln Road to West Street and the train station using Miller Drive, Arundel Drive, Leigh Road, Gordon Road and Grove Road. This route has been agreed with HCC and is considered an appropriate route from Welborne to the town centre and train station.
- 8.17.111 An alternative route to the town centre is to be provided by a new cycle path from Miller Drive through the Fareham Leisure Centre car park to Park Lane. The applicant and Council have agreed that a cycleway can be provided, at the applicant's cost, around the northern and eastern edge of the leisure centre car park linking to Park Lane at the current uncontrolled crossing point with William Prince Gardens which in turn links to Harrison Road, Osborn Road and the Town Centre.
- 8.17.112 The third and eastern route to the town centre will utilise footpath 101 (upgraded to a bridleway) and the new motorway footbridge provided as a result of the Smart Motorway proposals, linking to Standard Way and Broadcut. Through Broadcut on road cycle symbols are proposed to provide access to the retail park and onwards to the town centre via Southampton Road, Harrison Road and Westbury Road.

- 8.17.113 The Highway Authority has, during the consideration of the application, explored providing additional cycle facilities on the A32, North Hill and Park Lane.
- 8.17.114 North Hill is a single carriageway, two-way road with no current cycle provision and very little margin for road expansion within the highway-controlled land. Added to the fact that North Hill is proposed to accommodate the BRT route from Welborne to the town centre, plus carrying additional traffic in future years, the addition of cycle facilities in this very constrained corridor has proven challenging. A proposal has however been agreed between the applicant and the highway authority whereby cycle lanes are to be provided on Park Lane and North Hill northbound only. Cyclists having to negotiate the level change uphill when travelling south would likely use the other described routes using quieter roads.
- 8.17.115 It is considered that the provision of these three (east, centre and west) links is acceptable and will provide sufficient and attractive routes into the town centre whilst passing other accessible amenities (such as the employment and retail offer in Broadcut, schools in north west Fareham and the leisure centre) en-route to the main town centre. There is no highway objection to the pedestrian and cycling mitigation proposal and as such the proposal is considered to meet the requirements of Policy WEL28 criterion i).
- 8.17.116 Criterion ii) of policy WEL28 requires development to link to adjoining communities and the wider countryside. As described above the upgrade of the path through Dashwood to a bridleway will provide some linkage to off-site communities around Knowle and towards Wickham. It is noted that third party comments have indicated that it would be to the benefit of Welborne to connect through to the north west beyond Dashwood, however this is across land outside of the applicant's control and is therefore unachievable. The applicant has proposed changes to this route as far as they can within the land that they control.
- 8.17.117 In addition to the route through Dashwood the application proposes to improve pedestrian and cycle provision north to Wickham along Hoads Hill by providing a dedicated cycle lane on the western side of the carriageway, increase the width of the footpath south of the property known as "Silvertops" the removal of the southbound crawler lane and a reduction in the speed limit. Provision is proposed at Wickham to enable a transfer to the Meon Valley trail.
- 8.17.118 There are a number of other routes (as previously described) that connect into Welborne and then link to other communities, especially to the west, north of Funtley and on towards Whiteley, and into Fareham to the south. The retention of these connections and the improvement of the routes through the site itself are such that the proposal is considered to satisfy criterion ii) of the policy.
- 8.17.119 Criterion (iii) of policy WEL28 seeks attractive links across the A32 to encourage east to west movements. Criterion (iii) of policy WEL6 equally takes effect here. The Welborne Plan sets out that it is a key principle in

the planning of Welborne and the treatment of the A32 that land uses on the eastern side of the A32 are properly integrated into the main community to the west of the A32. In particular this is to be achieved through prioritised crossing points for pedestrians and cyclists.

- 8.17.120 The applicant's Pedestrian and Cycle Strategy sets out that there will be four crossing locations over the A32. These will all be at ground level and two will be controlled and two uncontrolled. The northern most crossing will be to the north of the new northern roundabout. This is an uncontrolled crossing and will link the northern parcels of development and the local centre with the Former Sawmills site on the east side of the A32 and to Forest Lane. Due north of the existing Knowle Roundabout the second crossing is proposed. This is also shown as an uncontrolled crossing location.
- 8.17.121 The new east-west link through Welborne will in part accommodate the diverted Footpath 88. This route will cross the A32 adjacent to the northern boundary of the District Centre School site and is proposed as a Pegasus crossing to facilitate a controlled crossing arrangement for pedestrians, cyclists and horse riders. At this location the A32 is shown as being single carriageway in each direction such that the crossing will be short, safe and given its location in proximity to the District Centre school site, suitably located as a route to school and the nearby District Centre amenities.
- 8.17.122 The fourth and final A32 crossing point is between the Broadway and Central roundabouts to the east of the District Centre. This is detailed on the drawings as a Toucan crossing. The A32 in this location has a single lane northbound and is dualled southbound such that the crossing has a pedestrian refuge island half way across the A32. The crossing will be safe and given its location in proximity to the District Centre is considered to be suitably located as a route to the nearby District Centre amenities for the population on the east side of the A32.
- 8.17.123 In the south eastern corner of the planning application site, south of Pook Lane (as it currently exists), is the proposed Roche Court Sports Hub. This facility would be accessed from either of the two controlled crossing points alongside the District Centre and through the road network on the east side of the A32.
- 8.17.124 There is no crossing point proposed south of the southernmost roundabout given that the A32 is dualled in both directions in this location and there is a flyby lane on the southbound carriageway linking to the M27 eastbound onslip. A crossing of the A32 in this location is not, therefore, possible.
- 8.17.125 Whilst the extent of crossing of the A32 is fairly limited, the fact that further crossings can't be accommodated is acknowledged. As such the proposal is considered to accord with part (iii) of policy WEL28.
- 8.17.126 WEL28 criterion (iv) requires provision to be made to ensure that there is adequate provision for access to Fareham schools in the early stages of development to serve the initial population at Welborne until the schools are built.

- 8.17.127 The improvements along Maylings Farm Road from Kiln Road will as well as providing links to the town centre and leisure centre provide enhanced access to Uplands Primary School. Further highway safety improvements are proposed. These works will, as a result, provide increased walking and cycling accessibility from Welborne to Henry Cort Community College. This provision will include measures along Highlands Road from Kiln Road to Fareham Park Road, up Fareham Park Road and along Wynton Way to Henry Cort College. The measures along Highlands Road may also increase the accessibility to Orchard Lea Infant and Junior schools. The proposed route will be a combination of on and off-road routes.
- 8.17.128 On site, the early residents of Welborne will be located to the north of Knowle Road. It is important, therefore, that until the on-site schools are provided that these new residents have an appropriate means of getting to the schools in Fareham. The applicant has proposed a temporary pedestrian cycle route that follows the route of the Welborne Mile (and the footpath therein) from Knowle Road down to Funtley Hill at which point the existing footway could be utilised to connect through to the schools on the south side of Kiln Road.
- 8.17.129 The Highway Authority is satisfied with the proposed links to the surrounding schools and as such this accords with the requirements of policy WEL28 criterion iv).
- 8.17.130 Overall it is noted that the County Council as the Highway Authority has raised no objections to the Pedestrian and Cycle Strategy submitted by the applicant.
- 8.17.131 The Countryside Service at HCC raised no specific objections to the diverted footpaths or the upgrade of footpaths to Bridleways as indicated within the submission and has been engaged in negotiations on the Section 106 legal agreement over the last year.
- 8.17.132 The Local Ramblers have objected to the proposed diversion of footpath 90 however this diversion is unavoidable as the footpath will need diversion to facilitate the construction of Junction 10.
- 8.17.133 The British Horse Society (BHS) has endorsed the improvements in so far as there is an increase in Bridleway provision and the inclusion of a Pegasus crossing over the A32. The BHS has also sought for the applicant to make further off-site improvements to the west of the site. However, given the on-site improvements to the rights of way network and the connections to the existing framework of routes, there is no clearly identifiable impact from the development for the applicant to also make off-site improvements as requested by the BHS. As such this request is not being pursued as part of the recommendation.
- 8.17.134 It is considered that the proposal is compliant with the requirements of policy WEL28.
- 8.17.135 Welborne Street Manual

The applicant is keen to ensure that the roads within Welborne will be

safely designed whilst including appropriate verges, landscaping, lighting, surfacing and parking provision. This approach will, it is hoped, avoid a highway dominated development over the creation of a sense of place within the development.

- 8.17.136 BDL is seeking to provide for this type of highway design at Welborne and has, through a series of joint workshops with the Council and Hampshire County Council as Highway Authority, been working on a new approach towards street design and ultimately adoption through the creation of the Welborne Street Manual.
- 8.17.137 Work is on-going still between the relevant stakeholders, including establishing an understanding of how HCC will adopt the standards in the Manual, such that the manual is not part of the application and in turn is not for consideration by the Planning Committee today. Rather the Welborne Streets Manual is expected to be appended to the strategic design code when that is submitted in the future. The principles for highway design and adoption are encompassed within the design code requirements and can be secured by condition.
- 8.17.138 The Welborne Streets Manual will ensure that the road network is designed without the dominance of the car, provides for suitable landscaping and tree planting space and will, above all, ensure that the development can achieve its aspirations to be a twenty-first century garden village. This in turn will deliver a development that accords with the general design principle identified within policy WEL6.

8.18 Employment provision

- 8.18.1 Policy WEL2 requires a range of highly accessible employment opportunities, including dedicated employment floorspace, to reduce the need for commuting and to contribute towards a degree of self- containment.
- 8.18.2 Policy WEL9 requires the employment land at Welborne to be principally focused on the land immediately to the north of the M27, to the east and west of junction 10 of the M27 and the A32. The Strategic Framework Diagram in the Welborne Plan identifies approximately 20 hectares (49.4 acres) of land for employment development focused on land to the immediate north of the M27, with the majority to the west of the A32, but also some to the east of the A32.
- 8.18.3 In terms of specific uses Policy WEL9 states that the employment areas could accommodate a range of employment uses including 'B' use classes and appropriate employment generating non-B use classes in order to provide a range of jobs to meet the employment needs of the new community. Policy WEL42 requires at least 3 hectares (7.4 acres) of land to be safeguarded for office development.
- 8.18.4 The Structuring Plan submitted with the application confirms that provision will be made for 21.35 hectares (52.6 acres) of strategic employment land and the Land Use Parameter Plan confirms that the employment area would be concentrated along the land to the north of the M27 and west of the A32.

- 8.18.5 By focusing the employment land to the northern side of the M27 the employment area would be accessible by the strategic road network and would be designed to avoid adverse impacts upon the amenity of nearby residential communities (both existing and proposed.) The location of employment land in this location would also provide the opportunity for footfall into the District Centre with the centre providing services for employees.
- 8.18.6 Unlike the Strategic Framework Diagram in the Welborne Plan, the application does not propose any employment land to the east of the A32, south of Pook Lane. The applicant's justification for not allocating land to the east of the A32 for employment purposes is that the land to the east side of the A32 is better used as part of the sports and recreation provision at Welborne
- 8.18.7 Given that the quantum of land allocated for employment uses is in accordance with the Welborne Plan and its location would be easily accessible from the strategic road network the absence of any employment land to the east of the A32 is not considered to have any undesirable consequences or result in conflict with other policy requirements. The absence of employment land to the east of the A32 is therefore considered to be appropriate and acceptable especially when considering all the required land uses in the round and the overall capacity of the Welborne site.
- 8.18.8 In terms of the type of employment generating uses proposed, the application proposes a wide range of employment generating uses including within B use Classes. The application proposes the following areas of land for B use classes based on the Use Classes Order 1987 (as Amended) which was in effect when the application was made and first considered by the Planning Committee:
- 30,000 sqm of B1 Office;
 - 35,000 sqm of B1c/B2 Industrial; and
 - 40,000 sqm of B8 Storage and Distribution
- 8.18.9 The proposed mix of employment land across the use classes is broadly in accordance with the mix identified in the Welborne Plan. From September 2020 the Town and Country Planning (Use Classes) (Amendment)(England) Regulations 2020 were introduced. Within these Regulations Use Classes B2 and B8 remain as they were with no change. Use Class B1 however is reclassified into Use Class E. Planning conditions will be imposed to ensure that a suitable mix of use classes are retained at Welborne.
- 8.18.10 In terms of phasing the Welborne Plan requires the phasing of land allocated for employment purposes to be split across all 5 phases of development. The application however proposes that the land allocated for employment purposes would be developed within the first three phases, that is at a faster rate than set out in the Welborne Plan. The key to considering the proposed phasing is understanding how it relates to growth at Welborne and to the findings of the Economic and Employment Land Study which is informing the Local Plan Review in the interest of Welborne providing a complementary offer to that elsewhere in the Borough.

- 8.18.11 Officers sought Consultants' advice from the same Firm (BE Group) that has helped prepare the evidence on employment land for the Local Plan Review to ensure that the proposed accelerated rate of delivery would not undermine the provision of employment land within the remainder of the Borough or in adjacent areas.
- 8.18.12 The Economic and Employment Land Study identified a shortfall in employment development in the short term. The proposed provision of employment land at Welborne could therefore actually be beneficial to the local market. Given that there are also employment floorspace shortages being experienced in the wider Solent area, the Consultant's advice confirmed that the accelerated rate of delivery of employment land at Welborne may also have broader economic benefits. The accelerated rate of delivery of employment land also addresses Portsmouth City Council's request for confirmation that the proposed delivery of employment land does not undermine the aim of the PfSH (Partnership for South Hampshire) position to prioritise growth in the two cities of Portsmouth and Southampton to the east and west of Fareham.
- 8.18.13 Policy WEL9 has a requirement for a Business Incubation Centre which will be a development which supports the growth of small businesses and entrepreneurship. The detailed layout of the employment area or the District Centre at Reserved Matter stage will provide for this type of facility however the land for the Business Incubation Centre will be secured through a legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.
- 8.18.14 The provision of employment land at Welborne is aligned for delivery alongside the housing and District Centre therefore the proposal should provide a range of job opportunities so that residents of Welborne have the opportunity to work locally. This will support the principle of self- containment advocated through the Welborne Plan by minimising the need for all residents to travel large distances between home, work, amenities and facilities.
- 8.18.15 Overall the proposed employment offer is considered to be acceptable and compliant with the aims of policy WEL9. The phasing and quantum of employment floor spaces will be secured through planning condition.

8.19 Retail Impact Assessment

- 8.19.1 Policy WEL10 and policy WEL11 indicate that the scale and type of retail and leisure development at the District Centre (WEL10) and Local Centre (WEL11) shall be appropriate to the centre's function and position within Fareham's hierarchy of centres. All retail and leisure development proposals will require an impact assessment to demonstrate that they can comply with policies within the Local Plan and that they do not adversely impact Fareham Town Centre or Wickham.
- 8.19.2 A Retail Impact Assessment (RIA) was prepared on the applicant's behalf to support the planning Application and this Assessment was updated as part of the 2018 Application refresh. The RIA considers the potential impact that centres at Welborne might have on the existing retail provision in Fareham

and at locations outside of the Borough, such as Wickham.

- 8.19.3 Officers sought specialist advice regarding the applicant's RIA from Lichfields. Lichfields' critique of the applicant's RIA broadly agrees with the applicant's submission in terms of methodology and conclusions reached.
- 8.19.4 The RIA predicts the greatest impact from Welborne will occur in 2038 when the District and Local Centres are implemented and trading at their full potential.
- 8.19.5 The impact upon Fareham town centre at 2038 is estimated to be a trade diversion of 3.5%. The advice to the Council is that trade diversion and impact on the town centre will be more than offset by expenditure growth between 2016 and 2038. This impact is not, therefore, considered to be significant and will not harm the vitality and viability of Fareham town centre.
- 8.19.6 The impact on Wickham's centre is 4.2% at 2038. Growth will offset this impact and there will be no material harm to the vitality and viability of the centre.
- 8.19.7 Furthermore, the projected turnover on Portchester and Locks Heath district centres is 3.6% and 2.2% trade diversion respectively at 2038, which will also be more than offset by expenditure growth between 2016 and 2038. Again, the Planning Authority is advised that this level of impact is not considered to be significant.
- 8.19.8 Policy WEL10 and WEL11 do not require the proposed District and Local centres to comply with a sequential test. However, Policy WEL10 requires the scale and type of retail and leisure development within the District Centre to be appropriate to the centre's function and position within Fareham's hierarchy of centres.
- 8.19.9 The scale of new District Centre is considered to be consistent with Policy WEL10. The scale of development proposed is consistent with existing district and local centres within the Fareham retail/centre hierarchy in terms of floorspace, mix of retail and non-retail services and expected retail turnover.
- 8.19.10 It will be necessary to control the mix and scale of floorspace through planning conditions, to ensure the new development functions as district and local centres, in line with the description of development and to ensure that there is no future impact on the identified centres. Subject to such a condition the retail impact of Welborne is considered to be acceptable.

8.20 Welborne's Centres

- 8.20.1 Policy WEL2 states that up to three local centres will be provided to act as neighbourhood hubs for the provision of social infrastructure and local employment opportunities. The following three centres each have a dedicated Welborne Plan policy and are identified in the Welborne Plan's Strategic Framework Diagram. They are also replicated in the submitted Land Use Parameter Plan:
- the District Centre (WEL10);

- the Local (Village) Centre (WEL11); and
- the Community Hub (WEL12).

8.20.2 District Centre

Policy WEL2 requires the development to provide supporting social and physical infrastructure including a range of convenience and comparison shopping options based around a new District Centre. The District Centre is the largest of the three centres and will form the 'heart' of Welborne. The District Centre would be positioned in between the A32 and the southern end of Central Park, in accordance with the requirements of Policy WEL10 and the Strategic Framework Diagram and the approximate location shown on the Policy Map. This location is designed to be highly accessible by all transport modes and in particular to capitalise on its location between Junction 10 and the A32.

- 8.20.3 Policy WEL10 states that the District Centre shall be well connected to the employment areas, to the Central Park and to Welborne's residential areas through attractive and direct walking and cycle routes which make use of the green corridor network where possible. The submitted Access and Movement Parameter Plan demonstrates that the main pedestrian and cycle routes will be well distributed and connected throughout Welborne.
- 8.20.4 The majority of vehicular movements will go through the site along a new north-south road which connects the District Centre in the south and the Local Centre in the north, helping to sustain the vitality of both centres.
- 8.20.5 Buildings in the District Centre could be of a higher density (up to 70 dph), mixed use and up to 5 storeys in height. The height and density in this area would signify the importance of this space as the heart of Welborne and its location adjacent to key routes through Welborne. A Design Code will be submitted to this Council for approval prior to any planning applications being decided within the District Centre.
- 8.20.6 The District Centre would, according to the submitted IDP, be commenced in Sequence 3 and completed (together with the main Community Building) in Sequence 4. Following detailed drafting on the Section 106 legal agreement, the Community Building is likely to be provided by 3,600 occupations which is, according to the IDP, towards the end of Sequence 3. Policy WEL10 requires the District Centre to be commenced early in the development period with the majority (including the main food store and the community building) completed within Phase 2.
- 8.20.7 Population forecasting has indicated that the early phases of Welborne would not generate the critical number of residents required to support services within the District Centre. Officers accept that the provision of the District Centre in the early phases as required by policy WEL10 would not be viable.
- 8.20.8 Policy WEL10 sets out the range and mix of uses that would be supported within the District Centre, including: a range of convenience shops and services, with a main food store of between 1,900 and 2,500m²; a range of comparison goods shops and services, amounting to approximately 3,600

square metres of (net) floorspace; the main community building, health care facilities, offices including provision suitable for small and start-up businesses which may include a Business Incubation Centre and residential dwellings

- 8.20.9 The application proposes up to 2,800m² food store retail (A1) which would include the main food store of between 1,900 and 2,500m² as required by WEL10. Up to 2,419m² of non-food retail (A1) and up to 2,571 m² of comparison retail use (A1-A5) is also proposed, in line with the requirement of WEL10 to provide approximately 3,600m² of comparison floorspace.
- 8.20.10 The application is accompanied by a retail impact assessment that confirms that the proposed retail and leisure proposals would be consistent with the role of the District Centre and its place within Fareham's hierarchy of centres and would not give rise to a significant adverse impact on Fareham Town Centre or Wickham's centre. Significantly, the proposed land uses within Welborne's centres could in fact result in positive effects through the wider spend generated by new residents which would off-set any trade diversions from Fareham Centre
- 8.20.11 The District Centre will also contain Welborne's main community building. Policy WEL13 requires the main community building to incorporate sufficient flexible space for community meeting, arts and cultural activities; an indoor sports hall large enough to accommodate 3 badminton courts, library space and sufficient space for a police service hub. Hampshire County Council has requested a contribution of £21,330 towards improvements to Fareham Library. There is no policy requirement to provide for off-site contributions. The contribution is also not considered to be necessary in order to make the proposed development acceptable in planning terms. The legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990 will ensure that the community building provides all of the services required by WEL13.
- 8.20.12 WEL13 also requires places of worship to be provided within or in close proximity to each of Welborne's centres. The Welborne Plan states that provision of places of worship could be provided within the community buildings.
- 8.20.13 The size, specification and timing of the community building's delivery will be secured within the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990. The supporting planning statement states that the specific characteristic, functions and design of these community buildings will be determined in future reserved matters submissions.
- 8.20.14 The District Centre will also contain provision for healthcare services. The healthcare provision within the District Centre is expected to take the form of a flexibly designed health and wellbeing hub. The provision of healthcare services is considered in detail in section of this report that considers health.
- 8.20.15 Local Centre
- Policy WEL11 requires a Local Centre focused on meeting the day-to-day needs of those living and working in the north of Welborne to be developed

north of the Knowle Road and close to the A32 in the approximate location set out on the Welborne Policies Map. The proposed location of the Local Centre as set out in the submitted Structuring Plan and Land Use Parameter Plan is in accordance with the approximate location shown on the Policy Map within the Welborne Plan.

- 8.20.16 WEL11 requires the Local Centre to be accessible by sustainable means of transport with convenient and safe access to both regular bus services and to the BRT and to be well integrated with pedestrian and cycle routes, including at-grade crossings over Knowle Road. The Structuring Plan Diagram confirms that the BRT route would include a stop in the Local Centre. The Structuring Plan Diagram also confirms that one of the main pedestrian and cycle routes would pass through the Local Centre.
- 8.20.17 WEL11 also requires the Local Centre to be well integrated with the green corridor network. The Local Centre would be adjacent to the east-west link along Knowle Road.
- 8.20.18 Buildings in the Local Centre would be mixed use, could be up to 50 dph and up to 4 storeys in height. A landmark feature such as a clock/bell tower or spire is proposed as part of the main community building in the Local Centre and would be up to 25m in height. The location of the landmark building is proposed within the Local Centre (rather than the District Centre as proposed by the Welborne Plan) because its elevated position would increase its prominence within Welborne.
- 8.20.19 As with the District Centre, the Design and Access Statement contains an illustrative layout relating to the design of the Local Centre, however this is illustrative only as the detailed design, including matters such as well-designed parking and well-designed public realm areas (as required by WEL11) would be approved in future applications.
- 8.20.20 Policy WEL11 also states that proposals for the Local Centre shall provide a range of retail and employment uses appropriate to the role of a 'local centre' within the Fareham hierarchy of centres.
- 8.20.21 The Local Centre will comprise up to 400m² food store retail uses (A1), up to 1,081m² of non-food retail uses (A1), a public house up to 390m² (A4 use) and up to 339m² of comparison retail use (A1-A5).
- 8.20.22 As addressed earlier in this report the application is accompanied by a retail impact assessment that confirms that the proposed retail and leisure proposals would be consistent with the role of the Local Centre and its place within Fareham's hierarchy of centres and would not give rise to a significant adverse impact on Fareham Town Centre or Wickham's centre.
- 8.20.23 Policy WEL11 also states that proposals for the Local Centre shall provide for community uses. WEL13 states that the community facilities provided in the Local Centre could potentially take the form of a shared space within the North Primary School however the application confirms that the Local Centre would contain an independent community building delivered early in the development. The community building would be designed to enable a range of uses to be provided including sporting facilities and a place of worship.

The size, specification and timing of the community building's delivery will be secured within the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.

8.20.24 The proposed Local Centre would be commenced in Phase 1 and completed in Phase 2. The Local Centre community building would be provided in Phase 1. The proposed phasing is in accordance with Policy WEL11 which requires the Local Centre and community building to be provided early on so that it supports the delivery of the residential areas and the primary school in the north of Welborne. The Local Centre is also considered to be acceptable to serve Welborne until the delivery of the District Centre.

8.20.25 Community Hub

Policy WEL12 requires a small-scale community hub to be developed west of the Central Park close to the western primary school in the approximate location set out on the Welborne Policies Map. The provision of the community hub in this location is designed to ensure that it supports the needs of residents in the west of Welborne.

8.20.26 The community hub is proposed opposite the Western Primary School. The positioning of the community hub in this location ensures that it would be close to the main east-west green link and directly adjacent to a BRT stop. The community hub would therefore be accessible by sustainable transport and well connected to the green corridor network and pedestrian and cycle routes as required by WEL12. A pedestrian crossing is also proposed adjacent to the community hub in accordance with WEL12 to facilitate crossing over the highway between the community hub and the Western Primary School.

8.20.27 The community hub will comprise a small scale, multi-purpose community building with the potential to accommodate community and flexible art/culture space and library space. Indoor sports will also be provided however, this may be provided at the Western Primary School in the form of a shared community use agreement rather than in the community hub itself. The size, specification and timing of the community building's delivery will be secured through a legal agreement.

8.20.28 Policy WEL12 also states that proposals for the Community Hub shall provide for a limited range of small-scale convenience retail with appropriate levels of well-designed parking. The detailed layout and provision of retail facilities and parking to serve the community hub would be considered at the reserved matter stage.

8.20.29 In terms of phasing, policy WEL12 requires the community hub to be linked to the delivery of the Western Primary School and the residential areas in the west of Welborne. The community hub is proposed to be provided in Sequence 4 according to the applicant's IDP together with the third primary school and by 5,160 houses. The delivery of these two amenities together would be in accordance with policy WEL12. As described above in the Education part of this report, the location and timing of the delivery of the second and third primary school will be agreed with the Local Education

Authority as the scheme develops. The Community Hub will, as a result of the Section 106 legal agreement negotiations, be delivered by the 5,000th occupation which is broadly consistent with the IDP from the applicant and will be secured in the legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.

8.21 Heritage

- 8.21.1 Section 66 of the Planning (Listed Buildings and Conservation Areas) Act 1990 states that in considering whether to grant planning permission for development which affects a listed building or its setting, the local planning authority shall have special regard to the desirability of preserving the building or its setting or any features of special architectural or historic interest which it possesses. The effect of section 66 is to give special statutory status to heritage assets. If proposed development conflicts with the objective of preserving a listed building or its setting there is a strong presumption against granting planning permission.
- 8.21.2 The NPPF states that Local Planning Authorities should identify and assess the particular significance of any heritage asset that may be affected by a proposal including by development affecting the setting of a heritage asset. The NPPF also states that when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset's conservation and the more important the asset, the greater the weight should be.
- 8.21.3 Policy WEL8 also requires development proposals at Welborne to: conserve the site's heritage assets in a manner appropriate to their significance; take into account the positive contribution new development can make to local character and distinctiveness; and provide suitable buffers to protect the setting of the heritage assets.
- 8.21.4 As this is an outline application, the impacts on heritage assets need to be considered by reference to the scope permitted by those parameters and the likely impacts from the proposed development, with the detail being considered at reserved matters stage. The statutory duty under s66 Planning (Listed Buildings and Conservation Areas) Act 1990, and the heritage policies of the NPPF and the Welborne Plan, will apply to the determination of reserved matters.
- 8.21.5 In order to consider whether the proposed development complies with legislative and policy requirements it is necessary to consider the significance of each asset and how the setting of each asset has evolved.
- 8.21.6 There are three listed buildings within the area allocated for Welborne: Dean Farmhouse, Roche Court and the lodge adjacent to Roche Court. Roche Court and the lodge are not included within the planning application site boundary but are within the Welborne Plan boundary and will be in close proximity to the proposed development. There are also a number of listed buildings in close proximity to the Welborne development.
- 8.21.7 Dean Farmhouse

Dean Farmhouse is a Grade II* listed building dating from the 16th century. In terms of significance, Historic England identifies the significance of Grade II* buildings as being within the top 5.5% of listed buildings in the country and as being particularly important and of more than special interest.

- 8.21.8 The farmhouse is set back from the existing road that provides access to Dean Farm, with a large front garden. The rear garden is enclosed by a brick and flint wall dating from at least 1841. There are fields directly north of the farmhouse and a large, steel, commercial building to the north east. To the east of the farmhouse there is a re-constructed threshing barn (originally from Twyford). To the south of the building there is a paddock and a riding manege with a line of trees running along the southern edge. To the west of the farmhouse there is a series of commercial buildings, of which the majority are modern.
- 8.21.9 Originally the farmhouse would have incorporated a rectilinear farmyard to the north, however none of these buildings have survived and the land to the north of the farmhouse now comprises a front garden.
- 8.21.10 A model farmyard to the west of the farmhouse existed by 1879. Two of the model farm buildings remain in situ, however the remainder of the original quadrangle has been replaced with modern buildings. A further farmyard to the immediate west of the farmhouse existed by 1910.
- 8.21.11 The deconstruction of the original farm yard to the north of the farmhouse and the creation of the model farmyard to the west isolated the farmhouse from association with the working farm. The two remaining model farmyard buildings are of heritage value however they are visually separated from the farmhouse by modern buildings and therefore have little association with the farmhouse. The heritage value of the two buildings in terms of their contribution to the setting of the farmhouse is therefore limited.
- 8.21.12 The Strategic Framework Diagram within The Welborne Plan identifies the land to the north and west of Dean Farmhouse for residential use, with a primary road running parallel to the farmhouse's southern boundary and employment land to the south of the primary road. The application proposes the same land uses adjacent to Dean Farmhouse as those illustrated within the Strategic Framework Diagram, although there is a slight difference in the alignment of the primary road proposed to the south of Dean Farmhouse and the parcel of employment land proposed to the east of the farmhouse is of a slightly different configuration.
- 8.21.13 The farmhouse would be separated from the proposed road by approximately 60m, from the area allocated for employment by approximately 14m and the area allocated for housing by approximately 17m to the north and 57m to the west. The proposed development would therefore have no impact on the character of the listed building itself, however the proximity of the proposed development would have an impact on the setting of the farmhouse.
- 8.21.14 The evolution of the environment around the farmhouse has eroded the majority of the original setting for the listed building, with only the original rear wall and the relationship with the access road remaining. Although the

farmhouse's front garden provides an attractive setting for the listed building, the house was originally set at the rear of a working farmyard, so the current context is different in character from the original context.

8.21.15 The addition of several, large commercial buildings: one to the north east and several to the west of the building are visually unsympathetic and inappropriate for the setting for the farmhouse and together with the traffic management installations on the access road to the east have changed the setting of the farmhouse to one in which the character is that of a small industrial estate which in turn affects the significance of the building. The addition of the reconstructed Twyford barn to the east of the farmhouse also has an adverse impact on the setting of the farmhouse as it has no historic relevance to the setting.

8.21.16 It is considered that while the proposed development would alter the setting of the farmhouse, the original setting of the farmhouse has already been significantly eroded over time to such an extent that the existing buildings adjacent to the farmhouse have a negative impact on the setting of the farmhouse. The proposed re-development therefore actually provides an opportunity to enhance the setting of the farmhouse. The exact design and layout of buildings adjacent to the farmhouse would be considered at the reserved matter stage and it is anticipated that the Design Codes for the areas of the site containing heritage assets would be more detailed than for other areas of the site.

8.21.17 The highways landscaping layout plan proposes a line of trees along the northern edge of the road. The proposed line of trees would provide an initial screen between the road and Dean Farmhouse which can be strengthened by the addition of further soft landscaping to the north. The detailed planting would be agreed at the reserved matter stage.

8.21.18 The submitted Building Heights Parameter Plans confirm that dwellings to the north and west of the farmhouse could be predominantly 2.5 storeys (with a maximum ridge line of 11m) with no more than 35% being 3 storeys (with a maximum ridge line of 14m.) The proposed employment buildings to the south and east of the farmhouse could be a maximum of 3 storeys and no more than 14m in height.

8.21.19 Officers are of the opinion that the proposed land uses adjacent to the farmhouse, together with the height and density of buildings are appropriate parameters to guide future detailed applications with the aim of preserving and enhancing the setting of the farmhouse.

8.21.20 Roche Court

Roche Court is a Grade II listed manor house dating from the early 13th century. The lodge was built much later in the 19th century but is also included within the listing as part of a 'group'. In terms of significance, Historic England identifies the significance of Grade II buildings as being within the majority (92%) of listed buildings in the country and as therefore being of regional importance and special interest.

8.21.21 Roche Court is located to the east of the A32 towards the south east corner

of the planning application site with a single point of access via Pook Lane. The historic house is the location for Boundary Oak School and forms part of the campus.

- 8.21.22 To the north of the historic house there are sports pitches with a line of trees along the northern boundary. To the north east and east of the historic house there are several modern buildings together with tennis courts within what was originally the walled garden. To the south east of the historic house there are another couple of modern buildings and to the south there is an area of car parking. To the west of the historic house there is a low wall and a ha-ha that marks the edge of the gardens. Beyond the school campus the land is open and comprises fields with a few remaining mature, parkland trees. To the west of the school, beyond the fields, there is a dense strip of woodland that runs along the eastern edge of the A32. The Lodge is located to the south east of the manor together with a modern school building.
- 8.21.23 In terms of topography, the house is positioned on a slope with the land falling gently down to the west and south west and more steeply down to the south and south-east.
- 8.21.24 The setting for Roche Court has evolved over the years. The house has always sat within its own parkland but was originally accessed via a drive to the west. Historic mapping indicates that the access drive had moved to a position similar to the current alignment by 1810. The extent of parkland surrounding the house has also changed over the years. There are however remnants of parkland remaining to the west and south west of the house, which together with the absence of buildings in this location results in the house still retaining some of its original character as a building within a parkland setting. The parkland character together with the absence of buildings and the open views that exist between the lodge and the manor are important features that contribute to the setting, and significance, of the house. The house itself, however, has been subject to re-configuration and loss of historic integrity over the years.
- 8.21.25 The submitted Structuring Plan and Land Use Parameter Plan confirms that the open fields to the west of the drive serving Roche Court will be retained as woodland and open fields. The application also proposes residential development to the north and north east of the school campus. In this regard, the proposed development is in accordance with the Strategic Framework Diagram.
- 8.21.26 To the east of the drive to the school, the application proposes parkland with lower density housing beyond. The application also proposes a road to connect Pook Lane with new internal estate roads. This road would be located to the east of the school.
- 8.21.27 The provision of parkland and lower density housing to the east of the drive accords with the land uses contained in the Strategic Framework Diagram, albeit that the proposed parkland is of a different shape and in a different location.
- 8.21.28 The change in the configuration of the parkland to the east of the drive has been designed in response to discussions with Historic England and the

Conservation Officer regarding the need to preserve and enhance the setting of Roche Court on approach to the building. Officers are of the opinion that the proposed configuration of the park is an appropriate design response that complies with the policy requirement to preserve the building and its setting.

8.21.29 The positioning of several school buildings to the east of Roche Court has changed the setting of Roche Court from being within a parkland to being within a school campus. The area to the west and south west of Roche Court remains open with a couple of mature parkland trees. Although there is an area of parking and two buildings to the south of the school, the remaining area between the lodge and Roche Court is largely open and undeveloped. It was therefore considered more appropriate to preserve and enhance the setting to the south east of the building as this area retains some of the original open parkland character. The provision of the larger section of parkland at the base of the drive would also ensure continued inter-visibility between the lodge and Roche Court as originally designed.

8.21.30 The Building Heights Parameter Plan proposes dwellings of predominantly 2.5 storeys with no more than 35% of up to 3 storeys in the areas to the north and south east of the school. The area to the east of the school would contain dwellings of 2 to 2.5 storeys in height. The Density Parameter Plan proposes an area of medium density housing to the north of the school with all of the housing to the north east, east, south east and south of the school being of a lower average density.

8.21.31 It is considered that the allocation of housing in this location would have some impact upon the setting of Roche Court. The proposed provision of a park to the east would however ensure there remains a sense of openness between the lodge and Roche Court that minimises the impact on the setting. The Parameter Plans will also restrict the density and height of residential development in this area such that the impact on the setting will be limited.

8.21.32 The identification of this part of the site as the parkland character area will inform the subsequent design codes and the detailed design and layout of the parkland and adjacent housing.

8.21.33 Impact on Heritage Assets

Regarding the statutory test in the Planning (Listed Buildings and Conservation Areas) Act 1990 (Section 66) it is considered, as above that the development can enhance the setting of Dean Farm and preserve the setting of Roche Court through compliance with the Structuring Plan, planning conditions and the future reserved matters and design coding process.

8.21.34 The NPPF advises that a judgment is to be made by the decision maker as to the impact upon a heritage asset as being one of either “less than substantial harm” to its significance, “substantial harm” or “total loss” as a result of a proposed development.

8.21.35 In the case of Dean Farm the proposals will have no impact on the listed building itself and will preserve the setting. Officers therefore conclude that

the proposal would not harm the significance of Dean Farm.

8.21.36 The proposals will also have no impact on Roche Court or the Lodge, however they will have an impact on the setting of the buildings. The impact on the setting is not considered to be significant such that the impact on the significance of Roche Court and the Lodge would be 'less than substantial.' Paragraph 196 of the NPPF therefore requires that *"Where a development proposal will lead to less than substantial harm to the significance of a heritage asset, this harm should be weighed against the public benefits of the proposal"*.

8.21.37 The harm to the setting of Roche Court and the Lodge it is concluded, can be managed through the detailed Design Codes and future reserved matter applications complying with the Parameter Plans, Structuring Plan and planning conditions recommended. As such, when balanced with the public benefits that Welborne will bring (a comprehensive, strategic, sub- regional development, infrastructure provision, green infrastructure, employment opportunities, affordable housing and protection for other green field sites for example) the impact on the significance of the buildings is less than substantial and this less than substantial harm is considered to be comfortably outweighed by the benefits the scheme will bring.

8.21.38 Listed buildings close to the site

In addition to the on-site listed buildings, there are several listed buildings close to the site:

- the Grade II Listed Crockerhill Mill House adjacent to the Former Sawmills Industrial Estate in the north east of the site;
- the Grade II Listed North Fareham Farmhouse to the south east of the site; and
- the Grade II Listed church of St Francis adjacent to the western edge of the site at Funtley

8.21.39 Crockerhill Mill House

Crockerhill Mill House is a Grade II listed building dating from the early eighteenth century. The building is of medium heritage value and is thought to have originally been associated with the Crockerhill brickworks. The brickworks were superseded by a Sawmill and the site's current use is as an industrial estate. The building is positioned on west side of Forest Lane which is immediately adjacent to the Former Sawmills Industrial Estate. To the north of the Mill House is a single storey, detached building containing the Industrial Estate's office. To the west of the Mill House there are a number of large industrial buildings. The Mill House's garden lies to the south. To the east of the Mill House there are open fields.

8.21.40 The Mill House's historic association with the brickworks has been lost and the current industrial buildings are of no merit in terms of their contribution to the setting of the Mill House. The submitted Structuring Plan proposes housing to the north and west of the Mill House which would be of medium average density and predominantly up to 2.5 storeys with no more than 35% of the houses being 3 storeys. The proposed housing would have no direct impact on the house itself but would have an impact on the setting of the

house.

8.21.41 The current industrial setting of the Mill House is long established but has no historic association and provides an unattractive setting. It is considered that the proposed housing would provide the opportunity to create a more open visual setting for the heritage asset which in turn could also provide greater visibility of the asset and allow for a better appreciation of it. It is considered that the application would provide appropriate parameters that would guide future reserved matter applications which would preserve and most likely enhance the setting of the Mill House.

8.21.42 North Fareham Farmhouse

North Fareham Farmhouse is a Grade II listed building dating from the 18th century. The farmhouse is located on Pook Lane to the south east of the site. The farmhouse is set back from the front of its plot by approximately 30m and has generous front and rear gardens. The land to the north, west and south west of the farmhouse comprises open fields. To the east of the farmhouse there are a number of farm buildings. To the south of the farmhouse lies a pair of farm cottages which are not listed.

8.21.43 The submitted Structuring Plan proposes a green pedestrian/cycle link around the perimeter of the site with housing beyond opposite the farmhouse. The housing in this location would be 2 to 2.5 storeys in height and of a lower average density. The proposed housing would be visible from the farmhouse and would alter the setting of the farmhouse from that of a farm set within the countryside to a farm located adjacent to a settlement.

8.21.44 Officers consider that the green perimeter trail is of sufficient width that it would provide a buffer between the farmhouse and the proposed housing, such that whilst some harm would occur to its setting through the loss of open countryside, overall the significance of the setting of the farmhouse would be 'less than substantial.'

8.21.45 As stated earlier Paragraph 196 of the NPPF requires that "*Where a development proposal will lead to less than substantial harm to the significance of a heritage asset, this harm should be weighed against the public benefits of the proposal*". This harm, it is concluded, can be managed through the detailed Design Codes and future reserved matter applications complying with the Parameter Plans, Structuring Plan and planning conditions recommended. As such, when balanced with the public benefits that Welborne will bring (a comprehensive, strategic, sub-regional development, infrastructure provision, green infrastructure, employment opportunities, affordable housing and protection for other green field sites for example) the impact on the significance of the buildings is less than substantial and this less than substantial harm is considered to be comfortably outweighed by the benefits the scheme will bring.

8.21.46 Church of St Francis

The Church of St Francis lies immediately adjacent to the western edge of Welborne. The building was originally built in 1836 as a school and used as a mission church on Sundays. The Church stood in relative isolation to the

south east of Funtley when first built, however the setting became more developed as residential development spread southwards towards the Church. The incremental development has gradually altered the setting of the Church with the addition of embankments serving the M27 having a further, dramatic impact on the setting.

8.21.47 The Church is Grade II listed and therefore of national importance and special interest. The church derives little enhanced significance from the character or quality of its setting. The application proposes an area of green space opposite the church which would preserve the setting of the Church. Accordingly there would be no harm to the setting of the Church.

8.21.48 Other listed buildings close to the site

Furzehall Farm and the Barn at Furzehall Farm located to the south east of Junction 10 are both Grade II listed buildings. The proximity of the existing Junction 10 to the buildings has already compromised the association of the buildings with the open fields. The position of the buildings beyond the A32 would therefore provide a degree of separation with Welborne that would prevent any further erosion of their setting.

8.21.49 There are additional listed buildings that are located within the vicinity of the application site, but further away than the buildings referred to individually for example Furzehall Farmhouse and cowsheds, 61 and 67 Park Lane and The Mission Room (Forest Lane.) These buildings are sufficiently separated from the site such that they would not be impacted by the proposed development.

8.21.50 Scheduled Ancient Monuments

There are no Scheduled Ancient Monuments within the site or within 1km of the site. There are however three Scheduled Ancient Monuments over 1km from the site: the post-medieval Funtley Ironworks, the Victorian Fort Nelson site and the World War II Anti-Aircraft Gun placement site at Monument Farm, between Fort Nelson and the Welborne site.

8.21.51 The post-medieval Funtley Ironworks and the anti-aircraft battery at Monument Farm do not share inter-visibility with the site due to distance, topography and screening. The proposed development would therefore have no impact on these monuments and would preserve their setting.

8.21.52 The Fort Nelson Scheduled Monument provides views towards the site across the Wallington River valley, however, existing screening protects views of the fort from the proposed development. The separation distance of 2km between the site and the Fort would prevent the development from having any impact on the Monuments. Accordingly, there would be no harm or loss of significance to the Monuments.

8.21.53 Non-Designated Heritage Assets

Park View Cottages to the south east of the site, due north of North Fareham Farmhouse, are locally listed and are therefore categorised as non-designated heritage assets. The cottages are currently set within open

farmland. The land use parameter plan identifies the land to the west of the cottages for residential development therefore they would lose their existing open outlook to the west. The cottages are locally listed and therefore have heritage value, however their value is not significant enough to warrant designated heritage status. The proposed development would not have any impact on the fabric of the buildings themselves, but it would have an impact on their setting.

- 8.21.54 Paragraph 197 of the NPPF states that the effect of an application on the significance of a non-designated heritage asset should be taken into account in determining the application. In weighing applications that directly or indirectly affect non-designated heritage assets, a balanced judgement will be required having regard to the scale of any harm or loss and the significance of the heritage asset. The impact of the proposed development on the setting of the locally listed cottages would be an indirect affect and is therefore considered to be acceptable given the limited significance of the buildings.
- 8.21.55 Known archaeological assets within the site include a Neolithic Long Barrow (a burial chamber dating from around 4,000-6,000 years ago) within the south of the site. There are no long barrow remains above ground level. The Long Barrow also falls within the category of non-designated heritage asset.
- 8.21.56 Policy WEL8 states that any significant archaeological finds which give clues to the past occupation of the site should be positively incorporated into Welborne's green infrastructure. The Welborne Design Guidance SPD states that proposals must retain the Long Barrow and recommends creative solutions to locate, frame or enhance the Long Barrow.
- 8.21.57 The Strategic Framework Diagram incorporates the Long Barrow within an area of open space (Central Park) in accordance with Policy WEL8. Detailed landscaping around the long barrow would be agreed at the reserved matters stage. The Barrow is currently vulnerable as it lies within a farmed arable field and could potentially be disturbed. The incorporation of the Long Barrow into an area of green space together with signage confirming its location would offer a degree of protection not currently available. Officers are of the opinion that the proposed development would not directly or indirectly harm the Long Barrow and the significance of the heritage asset would be unchanged.

8.22 Ecology

8.22.1 Impact on Internationally Protected Sites

The site lies within close proximity to four statutory designated sites of European nature conservation importance:

- the Solent and Southampton Water Special Protection Area (SSW SPA);
- the Portsmouth Harbour Special Protection Area (PW SPA); and
- the Solent Maritime Special Area of Conservation (SM SAC).
- the Solent and Dorset Coast SPA (SD SPA).

8.22.2 The SPAs and SAC, formerly known as Natura 2000 sites, have now been replaced by the 'national site network' under the Conservation of Habitats and Species (Amendment) (EU Exit) Regulations 2019 and receive statutory protection under these Regulations.

8.22.3 The site also lies within close proximity to:

- the Solent and Southampton Water Ramsar and
- the Portsmouth Harbour Ramsar sites.

Ramsar sites are designated as wetlands of international importance and are afforded similar legislative and policy protection to SPAs and SACs.

8.22.4 The Habitats Regulations require Fareham Borough Council as the competent authority to carry out an Appropriate Assessment to determine whether the proposed development would have an adverse effect on the integrity of the SPAs and SACs either alone or in combination with other sites and projects.

8.22.5 To aid the Council in carrying out the Appropriate Assessment, the applicant has provided a Report to Inform the Appropriate Assessment and a Shadow Appropriate Assessment. The Shadow Appropriate Assessment was updated and submitted with the documents in December 2020. These reports conclude the proposed development taken together with the mitigation measures would not have an adverse impact on the integrity of the identified sites and that this is demonstrated beyond reasonable scientific doubt.

8.22.6 The Council's Ecologist and Natural England have reviewed both reports and have confirmed that they concur with the conclusions reached and that the Council can adopt the applicant's Shadow Appropriate Assessment. A copy of the Shadow Appropriate Assessment November 2020 (Holbury Consultancy Service Ltd) is appended to this report at Appendix A.

8.22.7 *Mitigation Measures*

Policies WEL2 and WEL30 identify a bespoke mitigation package to protect these European sites which includes the provision of Suitable Alternative Natural Greenspace (SANG) and contributions towards the Solent Recreation Mitigation Partnership's long-term mitigation strategy. The purpose of the SANG is to provide attractive natural green spaces within the site that provide an alternative to people who may otherwise visit the coastline for recreational purposes.

8.22.8 The financial contributions are required to contribute towards implementing the Solent Recreation Mitigation Partnership's (SRMP) long-term strategy to mitigate against any potential impacts on the coastline that cannot be achieved solely by the provision of the SANG.

8.22.9 In addition to the proposed SANG and financial contribution towards the SRMP's long term mitigation strategy, the development also needs to be nutrient neutral to ensure no adverse impact on the integrity of the European sites.

8.22.10 The Shadow Appropriate Assessment shows that a potential pathway has been identified for Nitrogen entering the Solent. Detailed modelling based on policy compliant water usage of 105 litres per person per day shows that the development would result in a reduced level of Nitrogen entering the European sites. Natural England have however advised that the calculations should be based on water usage of 110 litres per person per day. Using water usage of 110 litres in the modelling also confirms that up to 6,000 dwellings could be built and occupied without any increase in the levels of Nitrogen entering the Solent.

8.22.11 To ensure that Welborne does not result in increased levels of Nitrogen entering the Solent European sites a condition is required to ensure that the development is designed to reach the water consumption standard set out above.

8.22.12 Sites of Alternative Natural Greenspace (SANG)

The Welborne Plan identifies the importance of SANG standards in mitigating recreational impacts on the coastal SPAs. Policy WEL30 states that it expects around 84 hectares (207.6 acres) of SANG to be provided although it recognises that land assembly and constraints such as noise from the M27 may mean that it is not possible to provide a full 84 hectares (207.6 acres) that are suitable for SANG. Policy WEL30 therefore allows for a degree of flexibility (to be agreed with Natural England) such that a slightly reduced area of SANG could be provided together with a financial contribution in order to mitigate the impact on the internationally protected sites on the Solent.

8.22.13 To ensure that SANG are an attractive alternative to the internationally protected sites, they should provide a varied but semi-natural landscape and experience and should incorporate the following as a minimum:

- Car parking for visitors from outside the area;
- Interpretation and information boards;
- Walks including dog walking facilities;
- Runs of between 2.5km (1.55 miles) and 5km (3.11 miles) that do not cross trafficked roads and are circular where possible;
- Informally surfaced footpaths; and
- Way markers.

8.22.14 The Welborne Plan identifies three main areas as having the potential to provide SANG: the Knowle Triangle (land between the western edge of Welborne and Knowle and within Winchester's administrative boundary), Fareham Common (land to the south of the M27) and Dashwood to the north west of the site (within Winchester's administrative boundary.) The application proposes SANG in two of the three areas identified by the Welborne Plan: Dashwood and Fareham Common together with an additional area called the Welborne Mile. The Welborne Mile would link Dashwood SANG in the north to Fareham Common SANG in the south and would run along the eastern edge of the Knowle Triangle.

8.22.15 *Dashwood SANG*

- Dashwood together with an area of grassland to the south east would provide 38.1 hectares (94.1 acres) of SANG. There are areas within Dashwood that are classified as Ancient Woodland such that the use of Dashwood as SANG, whilst accepted in principle through the Welborne Plan, still needs careful consideration on its delivery to ensure that the sensitive forest floor is protected. There are however, existing uses within Dashwood such as the use of the wood for playing airsoft (a team combat game that involves shooting opponents with pellets) which means that there are areas that lack the ground flora and structural diversity that is found in the remainder of the wood.
- 8.22.16 The proposed management of the existing woodland within Dashwood would involve the gradual removal of non-native species with the aim of ultimately removing all non-native species to allow natural regeneration to occur. Further habitat creation and enhancement is proposed by the creation of shallow depressions known as dog splashes in the south east of the SANG. Dog splashes are designed to provide two functions: to provide habitat for aquatic flora and fauna and areas for dogs to explore. Dog splashes would be allowed to fill naturally with water and would be 30cm at their deepest point.
- 8.22.17 The area of grassland to the south east of Dashwood would be 1.5 hectares (3.7 acres) in size and would be managed using an annual cut to encourage species diversity. The existing barn and area of hard surfacing within the area of grassland would be removed prior to the SANG becoming available for use. Infill planting is proposed to supplement the existing hedgerow along the southern edge of the grassland area and to discourage informal access into Dashwood. Some standard trees are also proposed within the grassland area. Proposed planting will have two functions: providing habitat and creating a natural landscape that contrasts with other more formal areas of greenspace within the site.
- 8.22.18 Access to Dashwood would be via four defined entrances with thorny buffer planting such as hawthorn and blackthorn along the eastern edge to discourage informal access. Within Dashwood, and land within the administrative boundary of Winchester City Council, an informal 2.89km (1.8 miles) circular path would be provided with the route of the path avoiding areas of ecological sensitivity. Existing public rights of way through Dashwood would also be maintained. Dashwood would be well connected to pedestrian and cycle paths. A car park is also proposed to the south west of Dashwood to add to the overall attractiveness of the site as a destination, in line with the ultimate aim of SANG which is to discourage visits to the sensitive coastal SPAs.
- 8.22.19 Dashwood is within the administrative boundary of Winchester City Council (WCC), therefore whilst this report explains the way in which Dashwood would be laid out and operate the Council is not the Planning Authority for this part of the SANG package and cannot enforce against any breach of planning control in Dashwood. However, the legal agreement will bind the land at Dashwood to ensure the ongoing management of the site (under section 33 of the Local Government (Miscellaneous Provisions) Act 1982 and will require the owner to submit a section 106 unilateral undertaking to WCC to ensure its use remains as SANG. Planning permission for the

- proposed footpath route and enhanced public access within Dashwood has been granted by Winchester City Council (WCC reference – 20/00882/FUL). The WCC permission is simply for the provision of a footpath route through the woodland with enhanced access. It does not propose the use of Dashwood as a SANG. However the Welborne Plan and the WCC Development Plan both identify Dashwood as SANG for Welborne.
- 8.22.20 This cross boundary situation results in a need to ensure that FBC can secure both the delivery of Dashwood as a SANG but also to ensure its long term, ongoing management for that purpose without being the enforcing Planning Authority.
- 8.22.21 Whilst the planning permission for the works within Dashwood is granted by WCC, the recommendations of this report specifically limit any occupation at Welborne until Dashwood is delivered, including the delivery of any necessary car parking provision. As such there is a need to deliver and implement the Dashwood permission from WCC before any occupations can occur at Welborne. BDL is the applicant for both applications and has agreed to the conditions imposed by WCC and recommended in this report to ensure the timely delivery of Dashwood.
- 8.22.22 The Governance section of this report sets out how all the green infrastructure (which includes the SANGS) will be managed and maintained in perpetuity. Given the role that FBC will have on the board of the Welborne Garden Village Trust (WGVT), this provides additional comfort to the Council that, despite not being the enforcing planning authority for Dashwood, the WCC permission can both be implemented and then managed and maintained as a SANG through the WGVT.
- 8.22.23 *The Welborne Mile SANG*
- The Welborne Mile is a green corridor of an average width of 90m that would follow the alignment of an existing public right of way running north to south on the western side of the development. The Welborne Mile would be 17.1ha (42.3 acres) in area and would link Dashwood in the north and Fareham Common in the south. The area is currently under arable production. The southern part of the area is generally of an open character with a hedgerow adjacent to the existing footpath. The northern part of the area contains more vegetation.
- 8.22.24 There would be several footpaths and cycle ways providing access to the Welborne Mile, however visitors from further afield could arrive by car and make use of the free car park (secured by condition) provided for users of Dashwood or the Welborne Mile to be located just off Knowle Road. The Welborne Mile would comprise wildflower meadows and a patchwork of tree and scrub planting. The southern part of the mile would be more extensively planted to help screen views of the M27. The scrub and woodland areas would be managed to provide habitat for dormice, whilst the edge habitat would provide habitat for foraging bats and common reptiles.
- 8.22.25 A 3.4km (2.11 mile) circular walk would be established within the Welborne Mile. The path would be informal in nature and any furniture would be of a rustic character. The Welborne Mile would be fenced to enable dogs to run

off the lead. Seven dog splashes would also be provided within the Welborne Mile.

8.22.26 *Fareham Common*

Fareham Common comprises all of the site that lies to the south of the M27. The Common is 15.2 ha (37.6 acres) and comprises a mixture of horse paddocks and arable land. The edge of the area is demarcated by hedgerows with mature stretches of scrub. The scrub along the M27 embankment has recently been cleared as part of the Junction 10 enabling works permitted under planning application reference P/18/1192/FP. Part of Fareham Common is classed as a Site of Importance for Nature Conservation (SINC.)

8.22.27 Fareham Common will comprise hay meadow planting with patches of woodland and scrub planting to break up some of the more open areas. Extensive planting will be provided along the southern part of the site to help screen views of the M27. A pond is proposed in the eastern part of the common to provide visual interest and to provide suitable habitat for great crested newt. Three dog splashes are proposed within Fareham Common. The scrub and woodland areas will be managed to provide habitat for dormice, whilst the edge habitat will provide habitat for foraging bats and common reptiles.

8.22.28 A 2.7km (1.68 mile) circular walk would be provided within the Fareham Common SANG. Dog-proof fencing would be installed along the northern boundary to prevent dogs accessing the bank of the M27.

8.22.29 The main access points to Fareham Common would be from Funtley Hill and Kiln Road with secondary access points from Kneller Court Lane. A free to use 22 space car park could be created in the north west corner of the common, accessible from Funtley Hill. The free car park is secured by planning condition with the final location to be determined through the detailed design process. The car park would enable visitors to access Fareham Common or the southern part of the Welborne Mile.

8.22.30 Furniture and bins within the SANG would be of a rustic nature in keeping with the natural character of the green space. All of the SANG would contain information and interpretation boards to explain the purpose of SANG and add to the overall experience of visiting a SANG.

8.22.31 Mitigation Measures – Conclusion

The proposed mitigation (SANG, financial contribution towards the Solent Recreation Mitigation Partnership and measures to ensure the site achieves nitrogen neutrality) will be secured at the necessary stages of the development, in accordance with well-established methods, to prevent there being any adverse effect on the integrity of the above sites.

8.22.32 *Management of the SANG*

Initially the SANG will be managed under a licence or management agreement with Buckland Development Ltd. Once the establishment works

have been undertaken for each SANG the land would be leased to a management organisation such as The Land Trust who would be responsible for the ongoing and long-term management. The management of the SANG would be included within the remit of two full time rangers responsible for ensuring that the infrastructure is maintained in a usable condition and for ensuring that visitor usage of the site does not result in damage to its ecological interest. A steering group would also be set up to enable proactive community engagement and involvement. Natural England support the creation of a steering group and have indicated that they would be keen to be involved. The proposed mechanisms for the management of SANG provides Officers with the certainty that is required to conclude that the proposed development would not have an adverse effect on the integrity of the European sites.

8.22.33 Funding of the SANG is based on a model that relies on an income stream from both an endowment and from Services Charges payable by all residents at Welborne. The SANG component of the service charge would be based on a costed breakdown of annual management operations. The long-term management of the SANG including 'step in' rights and service charge arrangements is explained in more detail in the Governance section of this report.

8.22.34 As explained in the Governance section earlier in this report, the Welborne Garden Village Trust will be authorised and regulated by the Financial Compliance Authority (FCA) and cannot be sold on. Its decisions will be transparent, with annual accounts available for public scrutiny. This form of management model is an established means of securing the SANG and will be secured together with the detailed SANG management plans, funding arrangements and step-in-rights through a legal agreement pursuant to Section 106 of The Town and Country Planning Act 1990.

8.22.35 *SANG Phasing*

The planning application proposes that Dashwood would be provided as SANG prior to the first occupation at Welborne, with the Welborne Mile being provided prior to the 3,601th occupation and Fareham Common being provided prior to the 5,101th occupation. The phased provision of SANG has been calculated through the Shadow Appropriate Assessment and has been agreed with Natural England as acceptable mitigation.

8.22.36 Representations received have raised concerns regarding the phased provision of SANG, in particular the timing of the Welborne Mile and Fareham Common on the grounds that the provision of the Welborne Mile and Fareham Common in later phases will result in significant pressure being placed on the ancient woodland and sensitive ground flora of Dashwood.

8.22.37 Natural England accepted the proposed phasing of the various SANG originally proposed, but strongly recommended that further consideration was given to the phased delivery of Welborne Mile and Fareham Common to allow sections of these SANG to be available in advance of the suggested triggers.

- 8.22.38 The applicant has submitted a Temporary SANG strategy in response to Natural England's comments. The Temporary SANG strategy relates to the provision of SANG at an earlier stage to relieve the pressure on the Dashwood SANG as a result of it being the first SANG to be provided. The temporary SANG strategy is summarised in the table below.
- 8.22.39 The temporary SANG strategy (which has been produced in consultation with Natural England) would continue to deliver Dashwood prior to the first occupation at Welborne. It would then provide 1.79 ha (4.42 acres) of the northern part of the Welborne Mile before the 750th occupation, a 35m wide strip along the full length of the Welborne Mile before the 2,700th occupation and approximately 9.5ha (23.5 acres) at Fareham Common after the completion of the Junction 10 upgrade.
- 8.22.40 The areas classed as temporary SANGs would not benefit from the full planting that will be provided at a later stage but would nonetheless have the benefit of being useable open green space provided at an earlier stage to relieve pressure on Dashwood SANG. Natural England have reviewed the Temporary SANG strategy and confirmed that they support its provision and recommend that it is secured by condition.

8.22.41 Temporary SANG provision and relation to permanent SANG

	Area (ha)	Area (ac)	Nature of provision	Trigger for delivery by	Description
Dashwood	38.1	94.1	Permanent	1 st occupation	
Planting connecting Dashwood & Blakes Copse	1.85	4.58	Permanent feature delivered early for temporary use as SANG	750 th occupation	Role as SANG will fall away in time, but green space & planting will be retained
Area of Welborne Mile north of Knowle Road	1.79	4.42	Temporary	750 th occupation	Will be made permanent for 3,601 st occupation as part of Welborne Mile
35m strip along full length of Welborne Mile linking existing PROW	3.98	9.83	Temporary	2,700 th occupation	Will be incorporated into permanent SANG for 3,601 st occupation
Welborne Mile	17.1	42.26	Permanent	3,601 st occupation	
Fareham Common-permitted access to western most fields prior to installation of formal infrastructure	Approx 9.5	Approx 23.5	Temporary	Post M27 J10 upgrade	Will be incorporated into permanent SANG for 5,101 st occupation
Fareham Common	15.2	37.57	Permanent	5,101 st occupation	

8.22.42 Assessment of the SANG

- Some of the SANG proposed within Fareham Common and the southern part of the Welborne Mile would be affected by noise from the adjacent M27 and would not provide a tranquil environment that meets the Natural England definition of a SANG. Natural England has therefore advised that the area of SANG that would be affected by noise from the M27 should be 'discounted' in numerical terms from the total package provided despite it still being physically provided and laid out for public access and use. The total area of 'effective' SANG, therefore, that satisfies Natural England's requirements amounts to 60.1 ha (148.5 acres) yet the actual physically laid out area of land would be 70.41 ha (174 acres).
- 8.22.43 Given that the total area of Natural England qualifying SANG proposed by the application would amount to 60.1 ha (148.5 acres) rather than the 84 ha (207.57) ideally sought by the Welborne Plan, the application also proposes the provision of 49.2% of the full SRMP tariff alongside each reserved matter application to be used to provide off-site mitigation measures to compensate for the decreased amount of 'effective' SANG.
- 8.22.44 The Hampshire and Isle of Wight Wildlife Trust raise concerns about the quality of the overall SANG package, given that parts of Fareham Common and the Welborne Mile are to be discounted as described above due to noise pollution and would like more than 49.2% of the Bird Aware tariff to be provided in addition to the SANG.
- 8.22.45 The provision of 49.2% of the Bird Aware tariff is calculated through the Shadow Appropriate Assessment and has been agreed with Natural England as acceptable mitigation for the reduced area of 'effective' SANG. The on site effective SANG provision of 60.1 hectares equates to 50.8% of the Thames Basin Heath SANGS standard – the standard against which the policy and the SANGS calculation for Welborne is based. To bring the SANGS mitigation package upto 100% of this standard Natural England has agreed that a proportionate contribution of 49.2% of the Bird Aware tariff is acceptable alongside the onsite SANG provision.
- 8.22.46 Officers consider the provision of SANG along with the level of financial contribution towards SRMP strategy out above is in accordance with policy WEL30.
- 8.22.47 Officers have considered the proposed package of mitigation measures (the actual laid out and delivered SANG together with the quantum of this that qualifies as 'effective' SANG) in consultation with Natural England and the Council's Ecologist and have concluded that the proposed development would accord with the requirements of policy WEL30 and not have an adverse effect on the integrity of the sites in terms of recreational disturbance.
- 8.22.48 The provision and management of the SANG will be secured by condition and within the legal agreement.

8.22.49 Impact on European Sites – Conclusion

The combined package of proposed mitigation measures: the SANG, financial contribution towards the SRMP strategy, the nutrient management plan and CEMP will ensure with the required high degree of scientific certainty that the proposed development does not have an adverse impact on the integrity of the European sites.

8.22.50 Nationally Protected Sites

There are three Sites of Special Scientific Interest (SSSI) within 5km (3.11 miles) of the site: Portsmouth Harbour SSSI; Lee-on-the-Solent to Itchen Estuary SSSI and Botley Wood and Everett's and Mushes Copses SSSI.

8.22.51 The SANGs, financial contributions towards the Solent Recreation Mitigation Strategy and nutrient management plan that are proposed principally to mitigate the impact on the International Protected sites will also offer protection to the Nationally Protected Sites, that is the SSSIs (some of which occupy similar areas to the International Designated sites) and ensure that there is no adverse effect on their integrity.

8.22.52 Locally (Non-Statutory) Protected Sites

There are 2 SINC's within the site (Blakes Copse and Fareham Common.) There are also 3 SINC's adjacent to the site (Dashwood, Knowle Hospital Row and Birchfrith Copse) and several SINC's within 5km (3.11 miles) of the site.

8.22.53 The proximity of some of the SINC's to Welborne means that they are likely to be impacted for example by the deposition of dust from the construction process. The application suggests ways in which the impact on SINC's can be limited and mitigated. The proposed mitigation measures are supported by the Council's Ecologist and can be secured by condition (for example by requiring the submission of a Mitigation and Enhancement Strategy, a Construction Environmental Management Plan and Lighting Schemes). Officers believe that the use of conditions to secure appropriate mitigation measures would protect the SINC's from potential impacts as required by policy WEL31.

8.22.54 The northern edge of Fareham Common SINC will also be affected by the proposed highway works to Junction 10. The impact of the proposed highway works on Fareham Common SINC, along with associated mitigation measures has recently been considered and approved under a separate planning application reference P/18/1192/FP.

8.22.55 Notable Habitats

The proposed development would result in the partial loss of areas of unimproved and semi-improved grassland, arable field margins, a pond and approximately 2km (1.24 miles) of species-rich hedges. In addition to

the direct impact of habitat loss, indirect impacts such as habitat degradation as a result of visitor pressure or construction activities is anticipated.

8.22.56 There are a number of mitigation and compensation features inherent to the design, including the creation of higher quality habitat areas (especially within areas of green infrastructure), supplementary planting, a pond, sustainable urban drainage systems and long-term habitat management. Buffer planting of at least 15m in width is also proposed adjacent to sensitive habitat areas with designated paths also included to avoid impacts on sensitive areas.

8.22.57 Protected Species

Policies WEL2 and WEL30 require applications to identify and assess potential impacts on protected species within and adjacent to the site. The application is supported by surveys which confirm the presence of protected species including: bats; dormice; great crested newts; badgers; reptiles and invertebrates, within the site.

8.22.58 The submitted Environmental Statement contains details of the ways in which the principles of avoidance, mitigation and compensation would be employed in relation to protected species. The Council's Ecologist has confirmed that the proposed measures are acceptable but has advised that there is likely to be a minor adverse residual effect on over-wintering birds due to the loss of arable fields. The relevant mitigation measures will be secured by planning conditions.

8.22.59 The proposed mitigation strategies required in relation to the works to Junction 10 have already been considered and approved under a separate planning application reference P/18/1192/FP.

8.22.60 The proposed development is likely to affect a number of species which are protected under UK law by the Wildlife and Countryside Act 1981 (as amended) and by the Conservation of Habitats and Species Regulations 2017 (commonly referred to as the Habitats Regulations).

8.22.61 Where development affects European protected species (EPS), permission can be granted unless the development is likely to result in a breach of the EU Directive underpinning the Habitats Regulations and is unlikely to be granted an EPS licence from Natural England to allow the development to proceed under a derogation from the law. Licences will not normally be granted in the absence of planning permission.

8.22.62 The development is likely to result in a disturbance to European protected species; therefore it is necessary to consider whether the development is likely to be granted an EPS licence from Natural England.

8.22.63 An EPS licence can only be granted if the development proposal is able to meet the following three tests:

1. *the consented operation must be for 'preserving public health or public safety or other imperative reasons of overriding public interest including those of a social or economic nature and beneficial consequences of primary importance for the environment'; (Regulation 53(2)(e))*

The proposed strategic development has been planned over a number of years and is designed to provide housing and jobs for residents of Fareham and adjacent areas over a number of years. The proposed development is of such a large scale that it would be in the overriding public interest both in terms of social and economic benefits. It is therefore considered that the proposed development would satisfy the first test.

2. *there must be 'no satisfactory alternative' (Regulation 53(9)(a)); and*

The Natural England guidance on license applications indicates that the second test must account for the "do nothing" scenario. This would leave the land in agricultural use with the affected species likely being disturbed through agricultural practices or from the need to modernise older buildings for modern agriculture practices.

Welborne provides for a defined area of development on such a large scale that there is not considered to be a satisfactory alternative elsewhere in the borough of Fareham for a development of this size and scale. It is therefore considered that the proposed development would satisfy the second test.

3. *the action authorised 'will not be detrimental to the maintenance of the population of the species concerned at a favourable conservation status in their natural range' (Regulation 53(9)(b)).*

The Council's Ecologist has advised that the proposed development would not be detrimental to the maintenance of the population of the species' concerned at a favourable conservation status such that the third test is likely to be satisfied.

8.22.64 The proposed development is likely to affect European protected species (EPS), however it is likely to be granted an EPS licence from Natural England to proceed under a derogation, therefore the impact on protected species would not constitute a reason to refuse the application.

8.22.65 Given that the development of Welborne will take place over a long period of time, WEL31 states that the ecological assessment should provide details of how it is intended to be regularly updated to ensure that any mitigation measures required are effective.

8.22.66 In October 2019 the recommendation to the Planning Committee included a condition which required the submission of a biodiversity enhancement strategy. This strategy would have demonstrated how biodiversity enhancement would be achieved through reserved matters applications through the lifetime of the development. Such details were required to be in accordance with the outline ecological mitigation, compensation and enhancement measures detailed within the submitted Environmental Statement Addendum, Ecology and Nature Conservation Chapter.

8.22.67 Since the Planning Committee resolved to grant planning permission in October 2019, the applicant has been working on the biodiversity enhancement strategy for Welborne. This document has now been formally submitted to this Council for consideration as part of the package of documents received in December 2020. This matter is considered further below.

8.22.68 Biodiversity

To protect and enhance biodiversity the NPPF states that when determining planning applications, the local planning authorities should seek to ensure that harm to biodiversity is avoided or compensated for and that opportunities to incorporate biodiversity improvements in and around development should be encouraged and supported, especially where this can secure measurable net gains in biodiversity.

8.22.69 Policies WEL2 and WEL31 also recognise the importance of conserving and enhancing biodiversity: Policy WEL2 states that green infrastructure will be required to ensure a net gain in biodiversity and policy WEL31 requires initial planning applications at Welborne to be accompanied by full ecological assessments that identify and address potential impacts on designated sites, priority habitats and protected species, within and immediately adjacent to the site boundary.

8.22.70 Policy WEL31 also requires proposals to demonstrate how the development contributes towards enhancing biodiversity through:

- i) The implementation of the broad habitat types within Welborne's semi-natural greenspace;
- ii) Incorporating design features within the built environment to enhance bio-diversity; and
- iii) Enhancing ecological connections to other areas of natural greenspace off site.

8.22.71 The application is supported by an ecological statement, a biodiversity statement with A Site Wide Bio-Diversity Enhancement Strategy, being submitted in December 2020. These documents explain the measures to be undertaken to protect and enhance the ecology and biodiversity of the site and how any negative impacts can be mitigated such that it is considered that there is no significant impact on the biodiversity and ecology of the area. The strategy for protecting and enhancing the ecology and biodiversity of the site is primarily based on the incorporation of retained habitats into a new network of appropriate and biodiverse habitats that include grassland/meadow, water bodies, woodland and hedge networks which will create strong ecological links within the site and to adjacent areas.

8.22.72 There is no objection to the proposal from the Council's Ecologist or from Natural England. As such Officers consider that the proposed development satisfies parts i and iii of policy WEL31. Part ii of policy WEL31 would be applicable to the subsequent detailed applications. The previously proposed condition requiring the submission of a site wide biodiversity enhancement strategy is no longer necessary. A replacement condition is recommended

requiring the development to come forward accordance with the submitted Site Wide Bio-Diversity Enhancement Strategy.

8.23 Utilities

8.23.1 Policy WEL2 requires development at Welborne to minimise energy usage, water consumption and carbon emissions. Policy WEL37 expands on the requirements of policy WEL2 and seeks to ensure that demand for water from Welborne should be minimised to ensure that water consumption does not exceed 105 litres per person per day and that each phase of development has provision of adequate infrastructure for a sustainable drinkable water supply. The policy also requires applications to be supported with a comprehensive waste water conveyance and treatment solution.

8.23.2 The following section of this report deals with some of the key utilities to be provided or altered at the site.

8.23.3 Drinkable Water Supply:

The drinking water supply for Welborne will come from Portsmouth Water. Portsmouth Water do not object in principle to the delivery of Welborne and have confirmed that they can service the Welborne community.

8.23.4 The distribution of land uses throughout Welborne and the works to the A32 will have an impact on the existing water main infrastructure of Portsmouth Water. There is a large (thirty-six inch diameter) water main running north to south through the District Centre site and the combined primary and secondary school site due north of the District Centre.

8.23.5 The applicants are not planning the strategic diversion of this water main. The applicant is fully aware of this water main as a constraint to the detailed design of this part of the site and within the development areas, appropriate land uses, such as open space, playing fields, schools, District Centre and highways would be designed to align with the water main. Other localised diversions of the smaller water mains adjacent to the A32 can be undertaken using statutory processes. Portsmouth Water has confirmed that this is acceptable to them.

8.23.6 There is a body of permeable rock to the east side of the A32 covering part of the Welborne site that is designated as a Source Protection Zone (SPZ), being an area used to supply public drinking water. Portsmouth Water has identified the need for planning conditions at the detailed design stage to prevent contamination of the SPZ, particularly during construction activities involving piling techniques or parts of the site that require decontamination work.

8.23.7 Conditions will also be required to ensure that adequate measures are taken to control solution features (areas of chalk that have been dissolved by acidic water runoff which have subsequently become filled with loose soil which can subside and leave depressions in the landscape) in the area.

8.23.8 The incorporation of suitable conditions will ensure that the development can

be serviced with a supply of drinking water in accordance with policy WEL37. The requirement of Policies WEL2 and WEL37 to minimise water consumption will be applicable to subsequent detailed applications.

8.23.9 Waste water disposal:

Initially the planning application proposed options for dealing with foul water utilising either or both Albion Water and Southern Water facilities. The application now proposes that the whole development will be serviced by the Peel Common Waste Water Treatment Works operated by Southern Water.

8.23.10 Southern Water has noted that there is a need for network reinforcements to be able to accommodate the development of Welborne. Southern Water also confirm that any such network reinforcement will be part funded by the charges paid by the developer to Southern Water with the remainder funded through the Southern Water Capital Works Programme. Southern Water are keen to work with Buckland Development Ltd to ensure that the delivery of homes at Welborne aligns with the delivery of the network improvements. Southern Water do not object to the development of Welborne.

8.23.11 Southern Water also indicate that there is the ability for some development at Welborne to connect to the existing system before reinforcements are required. However, they are unable at present to provide a threshold for when the reinforcements are required. There is no standard number of dwellings that would require the reinforcements, but Southern Water advise that it would be dependent on the type of connection from the development site and through discussion with the developer. As such the detail of the drainage solution for each development parcel can be addressed through a suitably drafted planning condition.

8.23.12 On this basis the proposal is considered to satisfy the requirements of policies WEL2 and WEL37 in so far as waste water disposal is concerned.

8.23.13 Overhead powerlines:

Scottish and Southern Energy Power Distribution PLC (SSEPD) have an overhead powerline crossing the site to the north of Knowle Road in a broadly east to west direction.

8.23.14 There is no policy requirement within the Welborne Plan for the removal of these overhead lines however the Welborne SPD requires the Strategic Design Codes to clearly show how necessary infrastructure and utilities can be accommodated on the site such as “...*underground servicing*” (para 1.40.) The Strategic Design Codes will be submitted after the determination of this outline planning application; the applicant has indicated within this planning application however that it is their intention to underground the SSEPD power lines.

8.23.15 SSEPD has expressed concern at the impact of the development upon their infrastructure. SSEPD believe that they, as the Distribution Network Operator, need to agree to the removal of the overhead lines. The overhead line and pylons on the site are the subject of a wayleave. A wayleave is a

form of licence over the land. Interference with a wayleave is not a material planning consideration. Officers are of the opinion, that the most appropriate response to the SSEPD representation and the ongoing discussion between the land owner and wayleave holder, is by incorporating a planning condition. SSEPD Has accepted that a suitably drafted condition can overcome their concerns.

8.23.16 The condition requires a suitable scheme for the undergrounding or re-routing of the overhead line to be approved by the local planning authority before a development trigger occurs. However, should the line be retained 'as is' then the development will need to plan for the retention of the line having regard to the High Level Development principles established through the Structuring Plan.

8.23.17 Whilst there is not a policy within The Welborne Plan explicitly requiring the overhead lines to be re-routed underground, doing so would ensure that Welborne can be more efficiently designed and laid out. To retain the lines above ground through the northern part of Welborne would likely have a significant detrimental visual impact upon the appearance of the development.

8.23.18 The ongoing discussion between the applicant and the operator (SSEPD) regarding compensation arrangements for the termination of the wayleave is a matter separate to the planning process. As set out above, a suitable means of re-routing the overhead line can be secured by planning condition and Officers consider therefore that the re-routing of the line is acceptable.

8.23.19 Gas Main

It is acknowledged within the Welborne Plan that there is a significant gas main constraint which runs from north west to south east across part of the Welborne site. Such gas mains necessitate development free areas along their length and development cannot take place within a certain zone or easement of the gas main. In addition to this building proximity distance to the main, high occupancy facilities such as schools, which might prove difficult to evacuate quickly in an emergency, cannot be developed within a specific proximity of a pipeline.

8.23.20 The location of the Central Park for Welborne sits over this gas main and provides the necessary clearance of built form from the gas main. The December 2018 amendments to the application also adjust the District Centre school site to ensure that the whole school site is now fully outside of the exclusion zone for this type of building in proximity to the gas main. There is now no objection from the Health and Safety Executive (HSE) on this issue.

8.23.21 Southern Gas Networks (SGN), as the operator of the gas main, has sought clarification from the applicant on some of the detailed road access arrangements, specifically, around Broadway Roundabout and its relationship with the gas main. At the time of the October 2019 committee SGN had verbally indicated that they have no objection.

8.24 Household Waste Recycling Centre

- 8.24.1 Policy WEL40 requires a new household waste recycling centre (HWRC) to be provided within the main employment area to the west of the A32. The land for the HWRC (0.8 ha/ 1.98 acres) is to be safeguarded through the legal agreement pursuant to Section 106 of the Town and Country Planning act 1990, for the future delivery of the facility.
- 8.24.2 Policy WEL40 states that the HWRC site is to be provided to Hampshire County Council (HCC) as the site operator on completion of 1,000 dwellings or at another threshold as specified by the Waste Authority.
- 8.24.3 The applicant is agreeable to the 0.8ha (1.98 acres) of land being safeguarded through any planning permission but sets out that the Waste Authority will need to go through the normal land acquisition steps to take control of the land.
- 8.24.4 The Waste Authority has calculated the proportionate cost of the Welborne population relative to the costs of the delivering the facility. A proportionate cost contribution has been agreed between the applicant and the waste authority along with the same relative proportion of the land acquisition costs. The actual delivery of the HWRC will be within the responsibility of the Waste Authority (in this case HCC). HCC has indicated that it will be half way through the development - 3,000 units - before the land is transferred to the County Council as Waste Authority and any contributions paid.
- 8.24.5 The submitted Structuring Plan and Land Use Parameter Plan locates the HWRC within the employment area to the east of Funtley and the west of the A32. Concerns had been raised by residents in Funtley as to its proximity with potential problems with odour and noise pollution.
- 8.24.6 As a result of these concerns, the location of the HWRC has been moved further east on the parameter plans. It remains within the western employment area but would be further from the houses at Funtley. The identified location is now proposed to be separated from the western edge of the site by a distance of at least 110m (50m wide buffer and 60m into the employment area). The final location and design of the facility will be fixed at the Reserved matter stage and could potentially be further east. The detailed layout could be designed with the waste bins sited at the east of the parcel identified which would further increase the separation distance.
- 8.24.7 The Council's Environmental Health Officers have confirmed that the separation distance of at least 110m between the broad HWRC location and the closest houses in Funtley is acceptable and should be sufficiently far away so as to avoid future complaints. The HWRC would also be set back from the strategic road network so that potential queuing traffic would not impact on traffic entering the wider site from the M27.
- 8.24.8 Representations have requested that the access to the HWRC is not from Funtley Hill. The proposed access to the HWRC is through the

employment area and the new road network at Welborne. It will not be accessed from Funtley Hill. An access from Funtley Hill to the Welborne development is not part of the access strategy for Welborne.

- 8.24.9 In addition, some representations have also questioned the need for a HWRC at Welborne given that there is an existing facility at Segensworth in the west of the Borough. At the plan making stage Hampshire County Council as the Waste Disposal Authority for Hampshire identified a need for a HWRC at Welborne given the projected increase in population and the capacity constraints at their other nearby centres within a reasonable distance from the application site. Whilst Welborne alone doesn't create a critical mass of population to require a HWRC alone, the capacity limitations at other HCC sites plus the fact that the delivery of Welborne is the largest of a number of housing developments in the County, combine to require the need for a new facility.
- 8.24.10 Lastly, representations have been received asking why the HWRC cannot be sited on the eastern side of the employment area adjacent to the A32. As detailed above the final location could vary still from that shown on the Structuring Plan/ Parameter Plans, however the location of the HWRC in the western employment area is likely to be where the general industrial (B1c and B2) uses would be located along with some distribution uses (Use Class B8) and as such the HWRC would be compatible with these employment uses. The land to the immediate west of the A32 is likely to be the location for the office employment provision (Use class B1) given the proximity of this employment area to the District Centre and the likelihood of office employees making trips to the District Centre.
- 8.24.11 Storage space for domestic waste and recyclable materials awaiting collection for domestic and non-domestic buildings will be considered in future reserved matter applications.
- 8.24.12 Subject to the required land for the HWRC being safeguarded through the legal agreement along with the required contribution towards land acquisition and site delivery being secured, Officers consider that the proposed development satisfies the requirements of policy WEL40.

8.25 Minerals

- 8.25.1 The introductory paragraphs of the Welborne Plan highlight the role that the Hampshire Minerals and Waste Plan plays in the Development Plan and that it is relevant in the determination of planning applications for development at Welborne.
- 8.25.2 The supporting commentary to policy WEL3 sets out at paragraph 3.14 that a portion of the Welborne site is identified in the Minerals and Waste Plan as a Mineral Safeguarding Area (MSA). This MSA designation is due to the potential deposits of predominantly clay but also some sharp sand and gravel within the site boundary. The plan continues to require that all development within the MSA will need to show how the scheme can comply

with the mineral and waste plan on MSA, specifically policy 15.

- 8.25.3 Mineral Safeguarding in the Mineral and Waste Plan is not intended to prevent development. It allows for the effective consideration of potential impacts and helps to ensure that non-minerals developments are appropriately located and designed.
- 8.25.4 The application is supported by a “Minerals Statement” which acknowledges that the mineral deposits identified are described in the Preliminary Site Investigation Report submitted with the planning application as ‘very clayey gravels’. Therefore, these are unlikely to be easily processed into high quality sands and gravels for concrete, asphalt, mortar and building sand end uses. In light of this, these deposits are not considered to be of commercial interest.
- 8.25.5 The development of the south western part of the Site containing the clay of brickmaking quality is not anticipated to begin before 2026. At the time of the preparation of the Minerals Statement, the nearest local brickworks is in Michelmersh (due west of Fareham, north of Romsey). The application submits that there are alternative minerals sites to the application site within the county which are highly likely to contain clay of brickmaking quality and there are a number of further potential extraction areas very close to the Michelmersh brickworks; closer than Welborne. Furthermore, the Michelmersh Brickworks does not have any spare on site capacity to store clay on its site or adjoining land near Romsey.
- 8.25.6 Incorporating surface minerals extraction into the masterplan and sequencing for Welborne would likely require a dedicated access built to standards to serve a minerals site, with all necessary mitigation for such work rather than it being an incidental operation of a house builder. The timing of the minerals requirement of 2027 coincides with the development of the land where some of the safeguarded mineral land is located such that the two operations would not necessarily be compatible.
- 8.25.7 It is noted that HCC as the Mineral and Waste Authority has indicated that the extraction of the sand and gravel resource is not commercially viable. However, HCC does, contrary to the applicant’s position, consider that small scale or incidental (to housebuilding) extraction can be undertaken regarding the clay deposits.
- 8.25.8 The position of both the Minerals Authority and the applicant are noted. However, the overriding imperative of the Welborne Plan is to deliver critical housing and jobs in Fareham within an area under considerable pressure to deliver new homes. In light of the alternative sites situated closer to the brickworks at Michelmersh which are not subject to such a regionally important policy allocation, nor identified by Government as a development with Garden Village status, a planning judgement is required as to the merits of mineral extraction in advance of or at the same time as the delivery of the new settlement. This judgement is applied in the Planning Balance part of this report.

8.26 Best and Most Versatile Agricultural Land

- 8.26.1 In addition to the mineral resource within the Welborne Plan boundary, allocation within the Welborne Plan comprises over 370 hectares (approximately 914 acres) of mainly arable agricultural land. The NPPF (para 170) requires decision makers to have regard to the contribution the best and most versatile agricultural land can play in supporting the rural environment such as the rural economy as well as the natural beauty of the countryside.
- 8.26.2 The Welborne Plan is silent on the loss of this Best and Most Versatile Agricultural Land (B&MVAL) as a result of the development such that the NPPF policy test would apply.
- 8.26.3 B&MVAL at Welborne is addressed within the Environmental Statement submitted by the applicant with this planning application. The development will result in the unmitigated loss of a substantial amount of the B&MVAL along with the associated employment that this farming activity supports. It is clear that there is a conflict, therefore, with the contribution that the retention of B&MVAL has to the preservation of the countryside and its intrinsic beauty. The planning judgement against this negative of the development is balanced with the benefits at the Planning Balance section of this report.

8.27 Flood risk and sustainable drainage systems

- 8.27.1 The application is supported by a Flood Risk Assessment and Drainage Strategy (FRADS); this sits within the Environmental Statement (ES) Appendices. This ES Appendix sets out the existing site conditions and assesses each flood risk as a consequence of the development proposal.
- 8.27.2 Within the application submission it notes that the tidal limit of the River Meon is at its mouth on The Solent at Hill Head, 6.3km (3.9 miles) to the southwest of the Application Site. The tidal limit of the Wallington River is in north east Fareham, 0.9km (0.56 miles) to the southeast of the planning application site.
- 8.27.3 The FRADS sets out that the application site is located above the influence of tidal flooding and therefore the risk of tidal flooding is negligible.
- 8.27.4 Moving to fluvial (river) flood risk, the Environment Agency's detailed flood mapping shows that the application site is wholly located within Flood Zone 1, which comprises land assessed as having less than a 0.1% annual probability of river or sea flooding. The Environment Agency (EA) has confirmed, within the appendices to the FRADS that it does not hold any records of fluvial flooding to the Application Site. The FRADS concludes therefore that the risk of flooding from fluvial sources to the application site is considered to be low. The Environment Agency has not

objected to the proposal and therefore this conclusion within the FRADS is accepted.

- 8.27.5 Flooding from Pluvial (rainfall) and Overland Flow Sources also needs consideration. During extreme storms the ground may become saturated and the drains and sewers which carry away the surface water may not be able to accommodate these flows or may even become blocked with debris. This in turn can lead to surface water flooding.
- 8.27.6 As part of the Environmental Statement the applicant has undertaken a more detailed surface water mapping exercise to determine and refine the available flood mapping from the EA. This exercise has looked at 1 in 100- year rainfall event and the predicted extent of surface water flooding. The submission concludes that the risk of flooding from pluvial or overland flow sources to the planning application site is considered to be mostly very low. There are however some small areas of low, medium and high risk, most of which are located close to or around the proposed Junction 10 works, where the site is at its lowest level.
- 8.27.7 The new road underpass beneath the M27, which will be constructed as part of the new motorway junction, is located in an area at high risk of surface water flooding and in a topographically low point of the planning application site. Therefore, as this is being constructed in advance of the main site, there is a risk that surface water will accumulate in the underpass and without mitigation pose a risk to the use of this road
- 8.27.8 The planning application sets out that the new underpass beneath the M27 will be designed and constructed to adoptable standards and will incorporate sufficient mitigation to minimise the risk of surface water flooding at this location. There are also alternative routes of access and egress to the development for events exceeding the design event for the drainage of this part of the road infrastructure.
- 8.27.9 The applicant's surface water drainage strategy is based on this knowledge of flooding as well as an understanding of the ground conditions, geological make up and the results of a hydraulic assessment of the site. It is proposed that surface water be discharged to ground given that the conditions are favourable for infiltration. The viability of discharge to ground via infiltration at individual development parcels will, however, be finally confirmed at the detailed design stage and will be informed by the results of detailed ground investigations at the planning application site, including further soakage testing, once the detailed layout is known.
- 8.27.10 In areas where infiltration to the ground is not possible, surface water will either be conveyed to locations where infiltration is possible or discharged to existing surface water drainage ditches. This is the case in the southwest corner of the site and at the northeast boundary, east of the A32

- 8.27.11 The application sets out that the proposal will achieve greenfield run off rates for the occasions when runoff water is discharged to existing ditches and water courses. This essentially translates to the scenario that the run off from the site will be no greater than the run off from the site in its current green field, undeveloped state. However, the drainage strategy does set out that the discharge of surface water to watercourses will only be used in areas where discharge to ground (infiltration) is not feasible. In order to ensure surface water discharge to ground or surface water bodies is sustainable, surface water storage will be required in the form of SuDS within the development parcels as part of the detailed design process.
- 8.27.12 Where discharge to ground is feasible, infiltration of surface water runoff will be distributed across the planning application site so as to replicate the natural drainage system as far as reasonably possible.
- 8.27.13 In areas where infiltration is perhaps not possible, surface water from these parcels will be conveyed to infiltration basins constructed in the open space before being discharged to ground.
- 8.27.14 For development parcels where discharge to ground is not possible and there is no storage and conveyance option, surface water will be stored within the parcel prior to discharge at current greenfield runoff rates to existing surface watercourses as set out above. SuDS features such as permeable paving, swales, geo-cellular storage and infiltration basins will all be used on site, the detail of which will all be finalised at the detailed design of the relevant phase of development.
- 8.27.15 The drainage along-side the M27 and the new underpass will include features such as swales and filter trenches alongside the carriageway; filter trenches (French Drains) alongside the slip roads; infiltration basins with additional filter layers; and, infiltration chambers where there are surface space constraints.
- 8.27.16 Representations have been received that refer specifically to parts of the site being susceptible to flooding and pooling of water in extreme rainfall events.
- 8.27.17 The current areas of high and medium pluvial and overland flow flood risk on the planning application site will be mitigated by the development. As set out above, the drainage networks and conveyance SuDS features will be designed to accommodate rainfall events and runoff with an allowance in the design for climate change and discharge of this to infiltration SuDS features.
- 8.27.18 The Flood Risk Assessment accepts that there are parts of the site where there are currently pluvial and surface water risk areas however, it is considered by the applicant that the use of infiltration techniques and a well-designed SuDS strategy that the development will reduce off-site surface water flows. This will be detailed fully as the scheme is designed

in detail and constructed.

- 8.27.19 It is noted that there is no objection on flood risk or drainage grounds from either the Environment Agency or the County Council as Lead Local Flood Authority. Officers consider that the proposal is acceptable regarding flood risk and the drainage solutions and is in accordance with the requirements of policies WEL2, WEL38 and WEL39.

8.28 Noise

- 8.28.1 Policy WEL6 seeks to establish the General Design Principles for Welborne and requires applications to consider the issue of noise and set out any necessary measures to mitigate the impact. The delivery of the employment area through Policy WEL9 also seeks to ensure that new employment floor space is designed to avoid adverse impacts upon the amenity of nearby residential areas. WEL24 also seeks to ensure that the proposals for the improvements to Junction 10 of the M27 "*...Minimise the environmental impacts within the site and on neighbouring communities, including any noise and visual impacts*" (criterion 1)e)).
- 8.28.2 The Welborne Plan acknowledges that the noise from the M27 provides a significant constraint to how Welborne is developed. During the preparation of The Welborne Plan the evidence to the Inspector when he was examining the Plan indicated that noise from the motorway was a key constraint and on this basis the employment land was proposed immediately north of the motorway to ensure that the proposed new residential development can achieve acceptable living standards relative to noise levels.
- 8.28.3 To the north side of the motorway and immediately north of the proposed Junction 10, within the identified employment land, are four dwellings namely 70, 72 Kiln Road and 1 & 2 Dean Farm Cottages.
- 8.28.4 The Council owns number 70 Kiln Road and both 1 and 2 Dean Farm Cottages. The Council's Head of Estates is in discussion with the applicant regarding the sale of the properties owned by this Council. At the time of determining this planning application, the three properties remain in residential use.
- 8.28.5 Number 72 Kiln Road is under private ownership and not that of either the Council or the applicant. It is understood that the occupant of number 72 is currently not looking to move from the site but has sold some of their land to the applicant to facilitate the development at Welborne specifically relevant to the Junction 10 works. The impact of the development both during and following construction has been considered upon these residential properties.
- 8.28.6 In relation to these properties the Environmental Statement had initially assumed that the applicant would control the land and that these properties would be demolished. However, accepting that the applicant

does not control this land, a further review of the impacts has been undertaken by the applicant to understand the impacts of the development upon these dwellings on the basis that they are retained.

- 8.28.7 The application concludes that the retention of these buildings does not lead to any further significant effects that were not previously identified at the time of the preparation of the Environmental Statement (ES) or the Addendum to the Environmental Statement. The ES identifies that there would be a harmful impact from noise during both construction and operation on these properties unless adequately mitigated for.
- 8.28.8 For these particular dwellings the background noise level is already high given their proximity to the motorway and the traffic noise generated by the high-volume use of this busy highway. The mitigation measures will be reflective of the high background noise levels already experienced. Despite the presence of the motorway, the construction of the all moves Junction 10 will bring the motorway traffic, specifically the new east bound off slip and the new north – south road, closer to these properties.
- 8.28.9 Construction mitigation is proposed within the ES and can be secured through the incorporation of a condition requiring a Construction Environmental Management Plan (CEMP) to be submitted for each phase of the development.
- 8.28.10 Given that the Council is open to disposal of its properties the most likely affected property to remain is number 72 Kiln Road. This property will be over 120m from the new slip road and in excess of 140m from the new north-south road. At these separation distances, whilst the construction works will be apparent the impact of the works can be mitigated, as identified above, through the CEMP and the mitigation measures identified in the Environmental Statement.
- 8.28.11 In the event that the Council does not dispose of its property then it is right that the impact upon 70 Kiln Road and 1 & 2 Dean Farm Cottages needs assessment. These three dwellings are all much closer to the road construction works than number 72. Number 70 is approximately 77m from the new north-south road and 70m from the new slip road. Dean Farm Cottages are only approximately 18m from the same road and the impacts would, as a result of this proximity, be greater. The ES notes that the construction impact would be mitigated through the use of the same mitigation measures summarised above and be secured through the CEMP conditions.
- 8.28.12 To further mitigate the impact of noise from the new north to south road linking the J10 off slip with the A32, a noise mitigation strategy for Dean Farm Cottages (given their close relationship with this new road) is required by condition. Whilst it is expected that this Council will dispose of the property to facilitate the delivery of the junction, should they be retained in residential use, the noise mitigation strategy will seek to secure acceptable noise limits for both indoor and outdoor living areas

and bedrooms. This is to be secured through a planning condition. Any noise mitigation measures will need to be installed prior to the M27 J10 coming into use.

- 8.28.13 The development of the employment area will also need careful consideration at the detailed design stage when the layout is being finalised to ensure that private external gardens are not dominated by traffic noise or operational noise. The applicant's attention will be drawn to this fact by an informative on the decision notice. It is also proposed to require a noise assessment for each development parcel to be secured by planning condition to ensure acceptable living conditions are achieved.
- 8.28.14 There are a number of representations received that have expressed concern at noise from the development and noise from traffic, especially those on the northern edge of Fareham closest to Fareham Common, and the new Junction 10 works and acceleration lane to the new westbound on-slip to the M27.
- 8.28.15 Whilst the works to Junction 10, including a new roundabout, underpass and slipway, will bring the physical motorway closer to the residents to the south of the site in areas such as Kiln Road, the noise modelling indicates that the actual noise levels will be no greater than those currently experienced.
- 8.28.16 The area of the application site most effected by noise from the motorway is the land immediately adjacent to it on Fareham Common. The noise dissipates southwards from the motorway such the proposed noise levels would be similar to the existing situation. The change in levels from the motorway up to Kiln Road is such that the noise level would be the same at Kiln Road with or without an acoustic fence. The provision of an acoustic fence on the south side of the M27 through Welborne and adjacent to Fareham Common would therefore serve no purpose and is not a policy requirement. The Environmental Health consultee response raises no concerns regarding the effects of noise on properties in Kiln Road.
- 8.28.17 Officers consider that the proposal accords with policies WEL6 and WEL24 subject to the incorporation of a condition to secure noise mitigation in respect of the acoustic barrier to the north of the motorway.
- 8.28.18 Whilst the employment land is considered to be less sensitive to noise pollution than a residential use, there is still a need for the layout and design of buildings in the employment area to provide a suitable working environment for employees. Careful consideration will be needed at the detailed design stage to ensure that service yards, car parks and buildings that are mechanically ventilated are closest to the motorway.
- 8.28.19 As well as the impact of the motorway noise on the occupants of the employment area the detailed layout of the employment space will need careful consideration as to how the proposed uses will relate to adjacent

existing communities (such as Funtley), existing residential properties onsite (such as 72 Kiln Road) and the new residential development at Welborne. The proposal provides for a mix of commercial uses within the B Use Classes. Noise generating uses such as General Industrial businesses (Use Class B2) and B8 uses (Storage and Distribution) will need to be carefully planned and laid out at the detailed design stage such that the impact of noise on adjoining (new or existing) communities and property is minimised.

- 8.28.20 The control of these types of uses through details such as hours of operation, building construction methods, noise emission limits or the use of outdoor space could all be controlled at detailed design stage if appropriate through conditions on the Reserved Matter approval(s).
- 8.28.21 On this basis, it is considered that the potential retention of 72 Kiln Road within the employment area would, through the considerate design and layout of the employment area, not result in any unacceptable adverse impact upon the amenity of the occupants of that property.
- 8.28.22 The description of development also indicates that there will be certain premises in the Centres that may give rise to noise problems. Licensed premises such as the hotel or public house could give rise to noise complaints at unsociable hours to the detriment of the amenity of residents. As with the employment area, the detailed control of these premises would be assessed and addressed at the time of considering the detailed design.
- 8.28.23 Schools and nurseries will need to be suitably located and designed to achieve suitable internal and external noise levels to ensure a satisfactory learning environment is provided for the students and children. As well as care being given to achieving an appropriate learning environment the juxtaposition of outdoor play space relative to residential uses also needs careful consideration when designing educational establishments to ensure that any noise impacts on private residential amenity is avoided.
- 8.28.24 In cases where nurseries are in close proximity to nearby noise sensitive receptors there can be a requirement to limit the times a garden area can be used or to limit the number of children that can use the outdoor space at any one time. Given that Welborne is being planned comprehensively this juxtaposition should be avoided. Controls over nurseries and educational establishments can be addressed, if required, at the detailed Reserved Matter Approval stage.
- 8.28.25 On the basis of the above the proposal is considered to be acceptable without any demonstrably harmful implications for either existing Fareham residents or the residents of Welborne itself as a result of construction or operational noise. The proposal is, therefore, considered to accord with policy WEL6, WEL9 and WEL24 in so far as noise is regarded.

8.29 Air Quality

- 8.29.1 Representations received have made reference to air quality and the need for the development not to worsen the existing air quality in the Borough. In addition the air quality around Welborne has been highlighted with specific reference being made to the location of the proposed sports pitches in the south east corner adjacent to the motorway.
- 8.29.2 Policy WEL6 seeks to establish the General Design Principles for Welborne and requires applications to consider the issue of air quality and set out any necessary measures to mitigate the impact.
- 8.29.3 Welborne is located such that the air quality of the site is influenced by emissions from road traffic; in particular the traffic using the A32 and that using the M27. Air quality is specifically addressed by the applicant at chapter 13 of the Environmental Statement.
- 8.29.4 The impacts on air quality have been modelled across the proposed site and in existing air quality management areas (AQMAS) and across a number of major roads throughout the Borough. The Environmental Statement concludes that the development will not have an unacceptable impact upon air quality in either existing AQMAS, or across roads in the Borough including those locations in the north of Fareham in close proximity to the application site.
- 8.29.5 It is predicted that the majority of the development will not be impacted by significant negative air quality impacts. Modelling identified elevated Nitrogen Dioxide levels in the southern part of the land identified for the sports pitches. The sports provision has been moved northwards as a result and a new planting strip added along the motorway edge to provide an appropriate buffer. The pitches are in an area where the level of air quality is at an acceptable level.
- 8.29.6 Mitigation measures can be secured via conditions for each phase of development to deal with air quality management and dust suppression measures during construction through Construction Management conditions. Air quality can further be mitigated through the travel plan which will seek to reduce the reliance on the private car and the use of other sustainable modes of travel. The travel plan is secured through the legal agreement.
- 8.29.7 On the basis of the above the proposal is considered to be acceptable without any demonstrably harmful implications on air quality for either existing Fareham residents or the residents of Welborne itself and in accordance with policy WEL6.

8.30 Development Viability

- 8.30.1 Through the preceding report, Officers have set out in detail the extensive

infrastructure which will be needed to comply with the policies of The Welborne Plan to make the scheme acceptable in planning terms. The infrastructure burden for Welborne, particularly during the early stages of the development, is substantial and this will have an effect on the viability of the scheme.

- 8.30.2 To fully explain the infrastructure requirements and the implications for the viability of the scheme, the applicant has submitted an Infrastructure Delivery Plan, a Site Wide Viability Report 2017, a Site Wide Viability Report Addendum (March 2019) a Supplemental Position Statement (August 2019) and a Viability Statement (December 2020). In June 2021 these were added to by a Welborne Garden Village- Viability Update (3rd June).
- 8.30.3 This Authority has instructed CBRE to review each of these submissions on its behalf, and to advise on the infrastructure delivery, costs and other implications for the delivery of the scheme. A copy of the assessments undertaken by CBRE on behalf of this Council are appended to this Planning Committee report and are: the 'Welborne Garden Village Planning Viability Review October 2019' (Appendix B); the CBRE addendum to this Report (Appendix C); the Garden Village Planning Viability January 2021' (Appendix D); and the Planning Viability Addendum Report July 2021 (Appendix E).
- 8.30.4 The following section of the report considers:
- The Infrastructure Delivery Plan;
 - M27 Junction 10 Costs and Funding
 - Community Infrastructure Levy
 - Applicant's Viability Proposal
 - Housing Investment Grant
 - Assessment of the Scheme Viability
 - Officers' Conclusions

Each of these aspects are considered in turn.

8.30.5 The Infrastructure Delivery Plan

Policy WEL41 (Phasing and Delivery) of The Welborne Plan states:

Initial planning applications for development at Welborne shall be accompanied by a detailed phasing plan and infrastructure delivery plan for the whole Welborne development. This phasing plan and infrastructure delivery plan will be guided by the Phasing Plan (set out within the Concept Masterplan Phasing Plan) and by the Infrastructure Delivery Plan that supports this plan. Once approved by the Council, the detailed phasing plan and infrastructure delivery plan will be kept under review over the life of the development, with changes being submitted to the Council for approval alongside relevant planning applications.

The phasing of development and associated infrastructure at Welborne shall be in accordance with the agreed detailed phasing plan and infrastructure delivery plan, unless it can be demonstrated that suitable appropriate infrastructure is available and the development can be adequately serviced.

- 8.30.6 Buckland Development Limited's (BDL) role is to act as Development Manager on behalf of the landowner for the delivery of Welborne. In this role BDL has submitted an Infrastructure Delivery Plan (IDP) as required by Policy WEL41. In essence this sets out what infrastructure is required to support the growth of the new community, including detailing when certain items of infrastructure are needed for delivery based on housing and employment trajectories. In summary, the IDP equates to circa £288M worth of infrastructure (excluding the Junction 10 contribution) to support the community at Welborne.
- 8.30.7 The infrastructure identified in the IDP, as set out throughout this report, will be secured by way of a Section 106 legal agreement. The Development Manager will be responsible for delivering much of the infrastructure and will create a number of serviced land parcels that will be sold on to various house builders. A broad overview of what infrastructure will be delivered when, was set out in the 'Phasing/ Sequencing' section of this report
- 8.30.8 To validate and critique Buckland Development Limited's IDP, the Council has instructed CBRE to work on its behalf and to review the submission regarding the scheme viability. The CBRE review of the scheme IDP has been undertaken alongside a review of the scheme viability.
- 8.30.9 The CBRE review of the IDP is broadly in alignment with the Buckland Development Limited IDP, with the costs attributed to the different items of infrastructure generally consistent. Accordingly, Officers consider that the proposal accords with Policy WEL41 in this regard.
- 8.30.10 M27 Junction 10 cost and funding
- 8.30.11 At the time of the October 2019 Planning Committee, the costs for the provision of M27 Junction 10 had increased since the examination of the Welborne Plan, the submission of the planning application and as the detailed designs were progressed by Hampshire County Council.
- 8.30.12 Within the applicant's submitted Site Wide Viability Report Supplemental Position Statement in 2019, the costs of delivering the Junction 10 works were estimated as being between £80 and £90 million.
- 8.30.13 Whilst the all-moves Junction 10 is required to make the development at Welborne acceptable, its provision will also deliver transport benefits for a much wider area. At the time of the October 2019 Planning Committee,

BDL had committed to meeting £20M of the cost of the Junction 10 works, with a further £29.05m of funding provided between the Department for Transport and the Solent Local Enterprise Partnership (Solent LEP). In October 2019 there still remained a funding gap of between £30 and £40m for Junction 10 based upon scheme costs at that time, which needed to be addressed.

- 8.30.14 Subsequent to the Planning Committee in October 2019, the Solent LEP re-deployed £23.5M of the £29.05M funding to other projects that were able to spend this funding in the period up to March 2021. The remaining £5.55M of funding has been provided by Solent LEP to HCC to fund the design stages of the Junction 10 works.
- 8.30.15 The funding of the Junction 10 works has been the subject of extensive discussion over a lengthy period of time between this Council, Buckland Development Ltd (BDL) HCC and various other external bodies, Government Ministers and Departments.
- 8.30.16 In late 2020, dialogue with the stakeholders referred to above, identified a further potential source of funding of £30M through the Government's Housing Infrastructure Fund (HIF), administered by Homes England. This was subject to a formal offer from Homes England and was dependent on the grant of planning permission.
- 8.30.17 The applicant had previously capped their contribution towards the costs of delivering Junction 10 at £20M in recognition of the far wider benefits its delivery will provide. In an effort to unlock the uncertainty around the Junction 10, and in the knowledge that £30M of grant funding might be made available from the Housing Infrastructure Fund, BDL offered to increase their contribution from £20M to £40M at the beginning of this year.
- 8.30.18 In January 2021, the Planning Committee were advised that the increased contribution of £40M from BDL, a £30M grant from the Housing Infrastructure Fund along with the £5.55M contribution from the Solent LEP offered a potential solution to the funding of Junction 10. The Junction 10 scheme delivery cost was estimated at the beginning of this year to be in the region of £75.5M.
- 8.30.19 In February 2021, Hampshire County Council (HCC) took a Welborne Junction 10 Project Review report to its Cabinet. Whilst HCC recognised the efforts made to put the Junction 10 funding in place, they raised concern that the funding envelope did not make provision for any contingencies beyond the estimated Junction costs. The risk costs were estimated by HCC as being between £5M and £10M.
- 8.30.20 For the County Council to agree to become the Delivery Body, they stated that they needed absolute assurance that all funding was in place, would be available to the County Council upon request and that there was an

underwriter for any potential cost increase which may arise from any of the scheme risks throughout scheme delivery.

- 8.30.21 In February 2021, HCC's Cabinet resolved that on the basis of the County Council's established policy and approach to involvement in the M27 Junction 10 Improvement Scheme, the County Council was unable to take on the role of the Delivery Body for the M27 Junction 10 Improvement Scheme. This was due to the current high level of financial risk and uncertainty for which the Scheme Delivery Body would be responsible. Should those financial risks and uncertainties be resolved to the County Council's satisfaction, HCC indicated that it would consider its position further.
- 8.30.22 In response to the funding challenges and following on particularly from the County Council's decision that it was unable to agree to become the scheme Delivery Body due to the financial risks and liabilities, MHCLG/Homes England convened a series of meetings with this Council, HCC and the applicants. These meetings sought to find a way to ensure the scheme and the Junction 10 works could be delivered and the development of Welborne Garden Village secured.
- 8.30.23 As a result of those discussions, a funding approach has been developed to ensure that there is sufficient funding for the Junction works, along with appropriate levels of contingencies in place. Before setting out the latest funding approach, it is considered appropriate to firstly set out HCC's latest position on the likely cost of the Junction 10 works.
- 8.30.24 HCC's current base cost estimate for the M27 Junction 10 scheme is £72.8 million. This figure includes the development and design work completed to date, which has cost £5.55m (funded from the Solent LEP Local Growth Fund). The £72.8 m base figure does not include any risk / contingency allowance for 'predictable and quantifiable' risks over and above the base cost estimate. The figure reported in HCC's Cabinet Report in February was £75.5M, which included a nominal risk allowance, on top of the base cost estimate figure of £72.8M. HCC estimate that including quantified risks to give a more realistic value would increase the cost estimate to around £81 million. This is considered by HCC to be a reasonable and robust working estimate at this stage of the process.
- 8.30.25 The funding arrangements now proposed would see Homes England provide a significantly increased grant towards the Junction 10 works of £41.25m, plus £750k Capacity Funding to enable HCC to continuing progressing technical work on the Junction design. This grant would be paid to Hampshire County Council through Homes England's Housing Investment Grant (HIG) programme. The grant is recoverable from the Master Developer at Welborne to this Council once the Welborne development achieves a specified profit level. The precise mechanics of how this would work is detailed later in this report.

8.30.26 In addition to the £42M grant described above, the developer will provide a contribution of £40M towards the Junction 10 works. Furthermore, the developer has undertaken to provide up to a further £10M contribution, on top of their £40M contribution, in the event that Junction 10 costs exceed £87.55M. The implications for the development if there is a need for the developer to pay a contribution in excess of £40M towards Junction 10, is set out in greater detail shortly in this report.

8.30.27 The proposed funding arrangements increase the potential funding available, including that already spent to £97.55 million, against an estimated scheme cost of £81 million (including normal risk / contingency allowances). This is shown as follows:

8.30.28

Cost	£M
Current Junction 10 Cost Estimate (including allowance for quantified risks)	81
Funding Sources	
Solent LEP contribution (paid)	5.55
Capacity Funding	0.75
Developer Contribution (Capped)	40
Potential HIG funding	41.25
Total	87.55
Developer Contribution (Capped) in the event of Junction 10 costs exceeding funding sources identified above	10
Total	97.55
Funding gap	0

8.30.29 At a meeting of HCC's Cabinet on the 13th July, it was agreed that the County Council was prepared to become the Scheme Delivery Body for the M27 Junction 10 Improvement scheme subject to confirmation of the full funding package of £97.55M (which includes £5.55M already spent) being made available to HCC, and a memorandum of understanding, along with appropriate agreements, being entered into between HCC and Highways England.

8.30.30 Both Highways England and Hampshire County Council advise that the Junction 10 improvement works need to be completed and open for use prior to the occupation of 1,160 dwellings at Welborne (or before a specified amount of employment/ retail floorspace is provided). A planning condition is proposed to prevent in excess of this quantum of development being occupied until Junction 10 is open and available for use.

8.30.31 The condition is worded to allow the developer to seek approval from this Council to alter the quantum of development which can be occupied before the Junction must be opened. Such a change may for example

propose increasing the amount of one form of development which can be occupied before the Junction is open whilst reducing the amount of another form of development. Any proposed change would require the approval from this Council and would in turn involve prior consultation with the relevant highway bodies (Hampshire County Council and Highways England). Should any changes be proposed to the quantum of development, it would need to be demonstrated that no greater impact would arise beyond that currently identified in the Environmental Statement.

- 8.30.32 This Council has sought to secure comprehensive development at Welborne (as required by the Welborne Plan) and to that end a condition was previously included in the recommendation to require the details of the sources of all the Junction 10 funding to be submitted prior to any other work taking place at Welborne other than the Junction 10 works and those directly associated with it.
- 8.30.33 Should Members resolve to grant planning permission for this development, it is highly likely that the Section 106 legal agreement will be completed and signed, and a planning permission issued before any HIG funding agreement is entered into. In light of this it remains appropriate to recommend to Members that a condition requiring details of the sources of funding for Junction 10 continues to be imposed. HIG funding of £41.25M, coupled with the developer's £40M contribution secured through the Section 106 legal agreement, the SLEP funding of £5.55M (already committed and spent) and the availability of up to a further £10M financial contribution from the developer in the event the Junction 10 costs exceed £87.55M, would enable the applicant to seek the formal discharge of the planning condition.
- 8.30.34 Officers consider that a developer contribution of £40 million, along with the potential of up to an additional £10M in the event of the Junction costs exceeding £87.55M, is fairly and reasonably related in scale and kind to the development (notably having regard to the significant wider public benefit that Junction 10 brings to the Solent region) and accords with regulation 122 of the CIL Regulations (the requirement for planning obligations).
- 8.30.35 In the reports to the Planning Committee in both October 2019 and January 2021, Officers highlighted that if the funding gap for the Junction 10 works could not be addressed by external funding sources, it may be necessary for the applicant to contribute more towards the cost of the works. It was also recognised at that time, that any increase in the level of contribution from the developer towards Junction 10 was likely to affect the levels of affordable housing. This matter is considered further below.
- 8.30.36 Community Infrastructure Levy:

The applicant's submitted viability work throughout has been based on the assumption that the development should not have to pay the

Community Infrastructure Levy (CIL).

8.30.37 The CIL liability was calculated at the time of the October 2019 Planning Committee as being approximately £74million (on the assumption of 10% affordable housing being provided). This figure would not have been payable in one go but instead would have been apportioned across each and every reserved matter approval and would have become payable during the course of construction of the development i.e. over 20+ years.

8.30.38 Officers, advised by their consultants CBRE, have previously considered the reasonableness of the assumption that CIL should not be payable and have then gone on to consider the implications of the scheme viability if the development remains CIL liable during the course of construction.

8.30.39 Since the Welborne planning application was considered by the Planning Committee in January 2021, Council has approved a Revised Community Infrastructure Levy Charging Schedule, which 'zero rates' the Welborne Local Plan area on viability grounds. As a consequence, the development at Welborne is no longer CIL liable.

8.30.40 Applicant's Viability Proposal

Paragraph 57 of the NPPF states "where up-to-date policies have set out the contributions expected from development, planning applications that comply with them should be assumed to be viable. It is up to the applicant to demonstrate whether particular circumstances justify the need for a viability assessment at the application stage. The weight to be given to a viability assessment is a matter for the decision maker, having regard to all the circumstances in the case, including whether the plan and the viability evidence underpinning it is up to date, and any change in site circumstances since the plan was brought into force. All viability assessments, including any undertaken at the plan-making stage, should reflect the recommended approach in national planning guidance, including standardised inputs, and should be made publicly available."

8.30.41 The high upfront infrastructure burden for the first 1,000 units (circa £105M borne by the applicant, representing around a third of the IDP budget for 16% of the houses) is considered exceptional circumstances. Officers are satisfied that such circumstances justify the need for a viability assessment. Therefore, Officers agree that full weight can be given to the assessment, subject to verification by the Council's advisors, CBRE.

8.30.42 The applicant has, through the consideration of the application, submitted five documents in relation to viability: a Site Wide Viability Report dated February 2017, a Site Wide Viability report Addendum dated March 2019, a Supplemental Position Statement dated August 2019, a Viability Statement dated 17th December 2020 and most recently Welborne Garden Village-Viability Update (June 2021). The latter three have principally formed the basis for assessment and negotiation.

8.30.43 In October 2019, BDL set out that the financial viability of the scheme had the following implications:

- The Scheme could not support the payment of CIL without further affecting the viability of the scheme
- The BDL contribution towards Junction 10 would be capped at £20M
- Affordable housing for the first 1,000 homes should be 10%
- The affordable mix for the first 1,000 homes is split 50/50 between affordable/ social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus for the first 1,000 homes
- A viability review mechanism is utilised going forward starting from 1,000 homes

8.30.44 In resolving to grant planning permission in October 2019, Members accepted the position set out in the bullet points above and resolved to grant planning permission on that basis. In addition to this, Buckland further confirmed that they would still be willing to proceed with the scheme even though the developer's return for the first 1,000 homes at Welborne would have been 14.4% Profit on Cost, below normal minimum developer returns. This reflected the long-term view BDL have taken in respect of the Welborne development. It is accepted in national government guidance that when considering development viability, a developer's profit margin of between 15 and 20 per cent of Gross Development Value is appropriate.

8.30.45 A Viability Review was proposed to take place at 1,000 homes and occur thereafter at a frequency of 750 units with additional affordable housing and other policy aspirations being secured once the BDL return had reached normal market levels.

8.30.46 In January 2021, the applicant amended their proposal by increasing their contribution towards Junction 10 by £20M to a total of £40M. Dialogue around that time with Homes England had identified a further source of potential funding of £30M from their Housing Infrastructure Fund (HIF). HIF funding was a loan into the scheme and not a grant and subject to scheme viability, the HIF funding would have had to have been repaid by the Master Developer. Repayment of the HIF Funding would have been to Fareham Borough Council and would have been available for reinvestment by this Council.

8.30.47 With the applicant increasing their contribution, there was inevitably some impact upon other aspects of the scheme. The applicant was acutely aware that this authority was keen to ensure that all necessary infrastructure is provided to serve for the needs of Welborne. The applicant was further aware that this Authority was keen to see as much affordable housing as possible delivered at Welborne.

8.30.48 The applicant highlighted that, with their increased contribution towards the cost of delivering Junction 10 of £40m, and with a normal developer rate of return (20% of Gross Development Value), the scheme would not have been demonstrably able to provide any affordable housing and still be judged as financially viable. Even with 14.4% profit on cost as modelled when the application was considered in October 2019 affordable housing delivery would have dropped to approximately 3%. Neither this Council nor Buckland wished to see affordable housing reduced to either of these levels.

8.30.49 The applicant requested in January 2021 that the Council formally consider the following revised viability proposal:

- The Scheme could not support the payment of CIL without further affecting the viability of the scheme
- The BDL contribution towards Junction 10 is capped at £40M
- Affordable housing should be 10% minimum
- The affordable mix is split 50/50 between affordable/ social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus
- A viability review mechanism is utilised going forward starting from 3,000 homes, then at 3,750, 4,500, 5,250 and 5,750 homes.

8.30.50 The applicant demonstrated that with their £40m contribution towards Junction 10 and the delivery of 10% affordable housing the developer's return would be only 1.5% profit on cost based on present day costs and values. As well as proposing that the first viability review takes place at 3,000 homes, the applicant also proposed the following changes to the viability review mechanism. This was in recognition of the considerable financial risk being borne by the developer in undertaking to provide 10% affordable housing on a development which would provide developer returns considerably below market norms over a long period:

In respect of the HIF Funding, this Funding would not start to be repaid until the developer's return:

- a) exceeded a minimum of 20% on cost; and
- b) 80% of any surplus above 20% on cost would be used to repay the HIF funding. The applicant had requested that the HIF Funding repaid should be reinvested in on site affordable housing by FBC.
- c) 20% of any surplus would be retained by the Development Manager.

Once the HIF funding was fully repaid:

When a minimum developer return of 20% on Gross Development Value (GDV) has been achieved;

- a) 50% of any surplus above 20% on GDV will be used to further boost the delivery of affordable housing up to a total of 30% including all other affordable.
- b) 50% of any surplus would be retained by the Development Manager.

8.30.51 In resolving to grant planning permission in January, 2021, Members accepted the positions set out at paragraphs 8.30.49 and 8.30.50, with

the exception of the scheme being unable to provide Lifetime Homes or Passivhaus. Members resolved that the provision of Lifetime Homes and Passivhaus should be considered as part of future viability reviews.

- 8.30.52 Since consideration of the planning application by the Planning Committee in January, there has been substantial progress in developing a funding approach for Junction 10. In addition to an increased level of grant being potentially available to fund the Junction 10 works through the HIG programme, the developer has undertaken to provide up to a further £10M contribution, on top of their £40M contribution, in the event that Junction 10 costs exceed £87.55M (hereinafter referred to as 'cost over-runs).
- 8.30.53 At this time, it is not known whether any or all of this cost over-run contribution may be required. There is of course a distinct possibility that none of the cost over-run contribution will be required and that scheme costs do not exceed £87.55M. It is a requirement of HCC however that such a contingency is identified in the event it is found to be necessary.
- 8.30.54 In the event that the £10M cost over-run contribution is called upon in whole or in part, it will have implications for the viability of the development. The developer has emphasised that at present their returns on the development are considerably below market norms to the extent that most developers would not proceed with the development. The Council's advisers, CBRE, concur with this view.
- 8.30.55 The applicant has put forward a proposition which means that if any of the cost over-run contribution is drawn down by HCC, the affordable housing provision is reduced in a manner which ensures that the master developer maintains the same level of return.
- 8.30.56 Financial modelling suggests that, if the full £10M of cost over-run were to be required then the impact could be to reduce affordable housing from 10% (600 units) to 7.3% (440 units), a reduction of 160 units. This results in every £62.5k of expenditure representing one affordable housing unit (being 10M divided by 160). If the cost over-run paid by the developer were to total £1M this would result in a reduction of 16 units and if it were £5M it would be 80 units. It is therefore the developer's proposition that for each £62,500 of cost over-run contribution HCC calls upon, the number of affordable housing units will be reduced by one.
- 8.30.57 The developer's viability proposal for Members' consideration at today's meeting is as follows:
- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
 - The developer contribution towards M27 Junction 10 costs is capped at £40m with a potential extra £10M for cost over-runs
 - Affordable housing should be 10% minimum unless the developer is required to contribute to cost over-runs

- The affordable mix is split 50/50 between affordable rent and intermediate tenures
- The scheme is unable to provide Passivhaus or Lifetime Homes initially and provision will be considered in each viability review
- Any cost over-run contribution will reduce affordable housing units by one unit for each £62.5k of contribution, up to an overall cost overrun contribution of £10M

The viability mechanism will now be as follows:

- The developer commits to provide a minimum 10% Affordable Homes unless any developer contribution to cost over-runs is required
- **HIG Element:**
 - A minimum developer return of 20% on Cost;
 - 80% of any surplus above 20% on Cost will be used to repay the HIG funding (with the applicant requiring that any repayment will be recycled by FBC to provide on-site affordable housing at Welborne)

Once the HIG funding is fully repaid and recycled:

- **Planning Gain Element**
 - A minimum developer return of 20% on GDV
 - 50% of any surplus above 20% on GDV will be used to further boost the delivery of affordable housing up to a total of 30% including all other affordable

Housing Investment Grant

- 8.30.58 As explained earlier in the M27 Junction 10 cost and funding section of this report, the funding arrangements now proposed would see Homes England provide a significantly increased level of grant towards the Junction 10 works of £41.25m, plus £750k Capacity Funding. This grant would be paid to Hampshire County Council through Homes England's Housing Investment Grant (HIG) programme. The grant is recoverable from the Master Developer of Welborne and would have to be paid back to this Council once the Welborne development achieves specified profit levels.
- 8.30.59 Homes England will require this Council to enter into a Memorandum of Understanding in the near future which will sets out the requirements placed on this Council in terms of HIG recovery, viability appraisals (reviews) and their frequency, and how recovered HIG may be spent. The

Principles which will be set out in the Memorandum of Understanding have been summarised by Homes England as follows:

- (1) Recovery of the HIG Funding is to be maximised at all times and will be subject to open book viability appraisals of the Garden Village by the Developer or their successor in title and is to be in accordance with the Section 106 Legal Agreement.
- (2) Any identified HIG recovery will support delivery of additional affordable housing within the Garden Village until such times as the Policy Target of 30% affordable housing is achieved. If the Policy Target is achieved at the Project (with or without the use of HIG Funding), there is to be further recovery of HIG funding up to the Maximum Sum, subject to open book Viability Appraisals (VA). Any such further recovery is to be paid to the Council and be used to unlock additional housing within the Borough.
- (3) The Developer is required to agree with the Council a Viability Appraisal (VA) for the Garden Village on an open book basis at fixed points in the development, the "Residential Unit Periods" i.e. at completion of the 2,000th, 3,000th, 4,000th, 5,000th and 5,800th dwelling (or such other Trigger Points to be agreed with Homes England).
- (4) Each VA will reflect the Developer's costs and revenues achieved to date on the project as at the Trigger Point and include an estimate of future costs and revenues to complete the Garden Village. Each VA will be submitted to the Council for approval and will follow the "Viability Appraisal Model" as previously agreed between the Developer and the Council. Each VA will assess the Profit on Cost to the Developer for the whole Garden Village.
- (5) Any Profit on Cost (PoC) identified in a VA in excess of 20% will be shared as follows:

80% of the surplus (the HIG Recovery Surplus) to fund additional affordable housing within the Garden Village

the Developer to retain 20% of the surplus.

Every VA will assess the project's viability and whether 20% Profit on Cost is exceeded and to identify the amount of the HIG Recovery Surplus that will allow the Developer to maintain its target 20% Profit on Cost. The Council will use the HIG Recovery Surplus to achieve the Policy Target of 30% affordable housing within the Garden Village. If the Policy Target of 30% is achieved any additional HIG Recovery Surplus (up to the Maximum Sum) will be used for other infrastructure projects which will unlock additional housing elsewhere

in the Borough.

- (6) HCC's claim against any or all of the £10m Cost Overrun Allowance could trigger a reduction in affordable housing at the discretion of the Developer (via the "Cost Over-Run Affordable Housing Calculation" as defined in the s106 agreement).

The reduction in the number of affordable homes will be calculated as the sum of the actual total Cost Overrun Allowance claimed by HCC divided by £62,500 (to the nearest whole number). This is the mechanism agreed by FBC and the Developer as reflecting the impact of a claim against the Cost Overrun Allowance on the Developer's cashflow at the point of planning approval.

- (7) The Council will procure through the s106 Agreement that the Developer commits to delivering not less than 10% affordable housing across the Project but with a minimum affordable housing provision as allowed under the adjustment set out in para 6 above. The revised percentage of affordable housing across the Project is to become the minimum percentage for all future VAs and will be subject to upwards only viability reviews. If there is no claim against the £10m Cost Overrun Allowance, the minimum affordable requirement is to remain at 10% and will be subject to upwards only viability reviews.
- (8) The Council will commit to using any HIG Recovery Surplus to ensure additional affordable housing in Welborne is delivered, but with the provision that by exception the Council is permitted to take HIG Recovery Surplus as a payment towards infrastructure projects that unlock additional housing elsewhere in the Borough but only with the approval of Homes England at their absolute discretion. For example, this could be at the Trigger Point of the 5,000th and/or 5,800th dwelling or where the level of affordable housing within a phase would exceed 40% of the dwellings.

8.30.60 Should Members resolve to grant planning permission, it will be necessary to ensure that all relevant matters set out within paragraphs (1)-(8) above, relating to viability appraisals, levels of affordable housing, cost over-runs relating to Junction 10, the recovery of HIG and the re-investment of HIG, are incorporated with the Section 106 Legal Agreement.

8.30.61 The applicants have stressed that their increased level of contribution towards the delivery of Junction 10 is conditional upon any HIG recovered at Welborne being re-invested in affordable housing at Welborne.

8.30.62 Members will have noted Fareham Housing's comments earlier in this report, that their preference is that flexibility is provided in how any HIG repayment/recycling can be used. Flexibility to use these funds throughout Fareham Borough (rather than being restricted to being used in Welborne) will provide the Council with the opportunity to provide additional affordable homes where they are needed most and where their

delivery can be most cost effective. Fareham Housing note however that the terms of the HIG funding may prioritise or require the recycled HIG to go to affordable provision at Welborne and this may be a stipulation from Homes England.

- 8.30.63 How any repaid HIG money is recovered and reinvested in the Borough is ultimately an Executive function rather than a decision for this Committee. It is however an explicit requirement of Homes England that recovered HIG is re-invested in affordable housing at Welborne. Therefore, should Members resolve to grant planning permission, it will be necessary for a report to be subsequently considered by this Council's Executive. The Executive will be asked to confirm that the Council is content to enter into a Memorandum of Understanding with Homes England which commits the Council to recover and reinvest the HIG on the terms set out by Homes England, among other things. Subject to this confirmation by the Executive, an obligation will be included within the Section 106 legal agreement confirming that Fareham Borough Council will recover and reinvest HIG in additional affordable housing at Welborne subject to agreed exceptions.
- 8.30.64 Lastly the applicant has requested that any affordable housing provided at Welborne 'out with' that which the scheme can viably deliver and is secured in the Section 106 legal agreement, should count towards the 30% affordable housing policy objective. Officers believe that in principle such an approach could be acceptable so long as the form and tenure of the affordable housing being delivered in this way, is of a type that this Authority is satisfied is necessary to meet the Borough's affordable housing needs.

Assessment of the Scheme Viability

- 8.30.65 The applicant's latest proposal, as was the case in January 2021, seeks to continue to provide a minimum of 10% affordable housing across the whole scheme. This position would only alter if HCC draw upon the Junction 10 cost over-run contribution. If HCC requires payment of the whole £10M the level of affordable housing could potentially reduce to 7.3%. The applicant has modelled that with their £40m contribution towards Junction 10 and the delivery of 10% affordable housing, or a £50M contribution with 7.3% affordable housing, the developer's return would be only 1.5% profit on cost based on present day costs and values.
- 8.30.66 The applicant states that their target remains to provide as close to 30% affordable housing as possible across the lifetime of the scheme. The viability implications of the increased Junction 10 contribution mean that the applicant cannot commit to the delivery of Passivhaus and Lifetime Homes at this time.
- 8.30.67 CBRE on behalf of Fareham Borough Council, have been engaging with BDL throughout the consideration of this application to fully understand the viability position and to find common ground around the assumptions

that are influencing the proposed quantum of affordable housing and the overall conclusions in the applicant's viability statement.

- 8.30.68 The applicant's viability modelling and proposals are based on present day costs and values. CBRE concurs with this approach and concludes that it is prudent to analyse the viability base case using today's costs and values.
- 8.30.69 CBRE has undertaken extensive reviews of the financial appraisals prepared by BDL including detailed reviews of the supporting cost and value information. Following these reviews, CBRE have previously advised this Council that it agrees with BDL's costs and values information.
- 8.30.70 BDL have not made changes to its costs and values assumptions at this time, except to include the provision of a further £10M of contribution in the event it is needed to address Junction 10 cost over-runs. Following a review of BDL's latest submissions, CBRE concurs with its assumptions that the scheme delivers a profit of 1.5% on costs and GDV. This is based on 10% affordable housing, split 50/50 between affordable rent and intermediate tenures and with no Passivhaus or Lifetime Homes. In CBRE's view this represents a level of profit well below which developers would generally consider bringing development schemes forward.
- 8.30.71 One of the conditions of HIG Funding is that it must be repaid once the development achieves a profit level of 20% profit on cost. The recovery of HIG funding is to be prioritised over the planning recovery element. A mechanism will need to be provided within the Section 106 legal agreement (subject to approval by the Executive) to ensure that the HIG Funding is recovered once the specified level of profit is achieved.
- 8.30.72 Once the HIG funding has been recovered in full, it will then be possible, using planning recovery linked to viability reviews to seek additional affordable housing and/ or Lifetime Homes and Passivhaus. It is considered unlikely that 30% affordable housing will have been achieved once HIG is fully recovered. BDL proposes that it must achieve a profit of 20% of Gross Development Value (GDV) before it must make additional payments towards affordable housing. The profit level proposed by BDL sits at the top end of range identified within Government guidance.
- 8.30.73 When determining the level of profit that should be applied it is necessary to consider the risks associated with the scheme, with higher risk schemes having higher returns and vice versa. The viability modelling shows that Welborne Garden Village generates a developer's profit of 1.5% on today's costs and values. In CBRE's view most developers would not bring a scheme forward where it generated such a low level of return. BDL is taking a long-term view of the project and predicting that values will increase over time enabling it to achieve a return in line with market norms. In consideration of the risk being undertaken by BDL a profit of 20% on GDV is considered reasonable by the Council's advisors,

CBRE.

- 8.30.74 In the report to the Planning Committee in October 2019, sensitivity analysis was been undertaken by CBRE on behalf of this Council, to assess the viability prospects with modest projected growth. The applicant assumes that construction costs could increase at a rate of 2% pa and values at a rate of 3% pa throughout the life of the scheme. They conclude that if these growth rates are achieved then additional affordable housing could be provided, notwithstanding the increased developer contribution towards Junction 10.
- 8.30.75 CBRE has benchmarked these cost and growth assumptions against available market data and have concluded that there is a reasonable prospect of this growth scenario being realised so that the scheme is not only capable of delivering 10% affordable housing but also a developer profit in excess of 20% GDV.
- 8.30.76 CBRE has further highlighted the likelihood of a 'Placemaking Premium' being achieved at Welborne. Research undertaken by CBRE and the RICS found that placemaking does add commercial value. Ambitious design with a commitment to innovative architecture, high grade materials and high-quality finish all help to drive the premium. CBRE consider that there is a reasonable prospect of the scheme achieving a value uplift in excess of 20%.
- 8.30.77 The testing undertaken by CBRE shows that with the projected growth scenarios and a 20% placemaking premium, that in excess of the minimum 10% (or potentially 7.3%) affordable housing should reasonably be expected to be achieved. Additional affordable housing will be funded firstly from the reinvestment of any recovered HIG Funding and following the full repayment of HIG, from further financial contributions secured from the developer through a planning recovery mechanism. This is in addition to other affordable housing provided at Welborne 'out with' that secured by Section 106 legal agreement.
- 8.30.78 The Council was previously advised by CBRE that in order to benefit from appropriate investment in place making that the first review mechanism into the quantum of affordable housing and the tenure mix should occur at 1,000 units. At this level it was hoped that there would be sufficient development and amenities provided whereby the creation of the community and the sense of place will be apparent and at this stage a review for future phases would be appropriate.
- 8.30.79 With the requirement for the developer to make a substantial increased contribution towards the Junction 10 works early in the development, it was agreed in January 2021 that the first viability review should take place later at 3,000 units.
- 8.30.80 The increased level of Junction 10 contribution from the applicant and the high infrastructure burden early in the development relative to the delivery

of homes is acknowledged. It is also acknowledged that a high level of Government grant will be made available to the scheme, to provide for the delivery of the Junction 10 works. Balancing these elements, Homes England has required that the first viability review now takes place at 2,000 units.

8.30.81 The viability position will be reviewed thereafter every 1,000 units throughout the development at 2,000, 3,000, 4,000, 5,000 and then at 5,800 units. Throughout the development the developer is committing to provide a baseline of 10% affordable homes (unless HCC have drawn down any of the cost over-run contribution).

8.30.82 In terms of the applicant's proposal that "50% of any surplus above 20% profit on GDV will be used to further boost the delivery of affordable housing up to a total of 30% including all other affordable", CBRE has advised that there is no formal planning viability guidance in relation to such 'profit share' arrangements. As such CBRE are only able to review the proposal to provide a 50/50 profit share on a commercial basis. In their view a 50/50 profit share above 20% profit on GDV is considered to be an equitable position, particularly as developers need to be incentivised to generate surplus profit. If 100% of any profit above 20% was claimed by the Council, there would be no reason for BDL, or indeed any developer, to strive to achieve any additional value. CBRE considers a 50/50 share of surplus profits to be reasonable and equitable to both the Development Manager and the Council.

8.30.83 In summary, CBRE concludes that: -:

the revised proposition put forward by BDL is reasonable on viability grounds. CBRE concur with BDL that as a result of bearing additional cost overruns to a maximum of £10m, taking the total developer contribution to £50m, in relation to the Junction 10 works: -

- Overall, the scheme produces a profit of 1.5% based on today's costs and values
- The developer contribution towards M27 Junction 10 costs is capped at £40m with a potential extra £10M for cost overruns
- Affordable housing should be 10% minimum until such a time that cost overruns have been confirmed
- A reduction in affordable housing provision by one unit for each £62,500 of additional contribution is reasonable
- Any reduction in the provision of affordable housing should not fall below a minimum of 7.3% in the event of any cost overruns
- The affordable mix is split 50/50 between affordable rent and intermediate tenures but this should be re-assessed during future viability reviews

- The scheme is unable to provide Passivhaus or Lifetime Homes at this time but this should be re-assessed during future viability reviews
- Viability reviews should be held at 2,000, 3,000, 4,000, 5,000 and 5,800 dwellings
- It is appropriate to have two recovery mechanisms – HIG repayment & planning viability review. HIG repayments will precede the planning reviews and all payments will be made in line with the proposed profit sharing arrangement agreed in January 2021.

8.30.84 Officers' Conclusions:

8.30.85 Delivering affordable housing is a corporate objective of the Council and Welborne offers an ideal opportunity to meet that objective. However, with large scale strategic sites often comes a heavy infrastructure burden; the implications of which, through the development viability, can have knock on effects for affordable housing. Even with the increase in the Junction 10 contribution made by the applicant, the proposal continues to offer a minimum of 10% affordable housing (or 7.3% where HCC call upon all of the £10M to cover cost over-runs on Junction 10).

8.30.86 A balance needs to be struck when considering the level of affordable housing and the wider delivery of a major new garden community with a substantial 'front loaded' infrastructure burden.

Policy WEL18 (Affordable Housing) states:

"Development at Welborne shall provide a total of 30% affordable housing.

Each residential phase of development shall be required to meet the target of 30% affordable housing provision unless a robust and transparent viability appraisal proving this not to be possible is accepted by the Council.

In exceptional circumstances where viability considerations require, the minimum affordable housing numbers on any phase will be 10% (subject to viability and the implications for other infrastructure) and the maximum required will not normally exceed 40%.

Where it is agreed that a residential phase will not meet the 30% target of affordable housing, the subsequent phase or phases will be required to meet that shortfall in addition to the 30% target if possible in viability terms.

The initial tenure split will be 70% affordable or social rent and 30% intermediate tenures. The tenure split will be kept under review phase by phase based on evidence of need and viability.

8.30.87 Given the exceptional viability circumstances as anticipated in Policy

WEL18, and the advice of CBRE, Officers consider that a 10% level of affordable housing for the first 2,000 dwellings, is in accordance with policy WEL18. In the event that HCC call upon all or part of the £10M to cover cost over-runs on Junction 10, this would result in subsequent phases of the scheme delivering less than 10% affordable housing (unless viability reviews increase the level). Delivering less than 10% in these circumstances, would be contrary in part to Policy WEL18.

- 8.30.88 At this time, it is not known whether the £10M contribution towards cost over-runs on Junction 10 might be needed in whole or part. In the event it is not called upon the development remains compliant with Policy WEL18. If the contribution is required in whole or part, phases of development are likely to fall below 10% affordable housing provision. This potential breach of WEL18 needs to be considered in the context of delivering the wider Welborne Garden Village and the viability of the scheme.
- 8.30.89 The Section 106 legal agreement will secure a minimum baseline of 10% affordable housing across the development (or down to 7.3% affordable housing in the event that the £10M is needed in whole or part to address any Junction 10 cost over-runs) and be subject to viability reviews. Through these upward only viability reviews it is anticipated that affordable housing provision can reasonably be expected to increase above 10% (or any lower figure resulting from a call of the cost over-run contribution). From the earlier modelling work undertaken by CBRE it is envisaged any material increase in affordable housing provision will occur from the midpoint of the development onwards.
- 8.30.90 Again, having careful regard for the viability of the scheme and the advice of the Council's advisors, CBRE, the proposed tenure mix with a 50:50 split between affordable/social rent and intermediate housing in the first 2,000 dwellings is also considered to accord with Policy WEL18. CBRE's view is that a tenure split with a higher emphasis towards rented property would further impact upon scheme viability and in turn the level of affordable housing which can be provided. The tenure split of affordable housing can be considered as part of the viability reviews.
- 8.30.91 Potentially only having between 7.3% and 10% of affordable homes towards the halfway stage of the development however means that achieving 30% affordable housing across the lifetime of the development is likely to be extremely challenging.
- 8.30.92 Providing affordable housing at a level below 10%, would mean that the development would be contrary to Policy WEL18 in part. In the opinion of Officers, and in the light of the advice of CBRE, there is clear viability evidence to suggest that affordable housing provision below 10% should be accepted notwithstanding the partial potential conflict with Policy WEL18. The current rate of developer return is significantly below market norms, and CBRE advise that many developers would not proceed based on the current projected returns. If the reduction in affordable housing

were not accepted, the scheme would most likely become stalled.

- 8.30.93 It is considered that on the basis that the legal agreement will secure a minimum of 10% affordable housing (reduced to a minimum of 7.3% in the event of the whole of the £10M cost over-run contribution being required by HCC), split 50:50 between affordable/social rent and intermediate housing in the first 2,000 homes, and include upward only review provisions with the objective of securing an overall provision as close to the policy target of 30% affordable homes as possible, that the applicant's proposal, on the grounds of viability, is acceptable.
- 8.30.94 The viability work undertaken and agreed by CBRE indicates that there is a premium added to the build costs for both homes built to a Passivhaus standard and for Lifetime Homes. This premium is such that to deliver these house types at Welborne would demonstrably affect the viability model and in turn the level of affordable housing which could be provided.
- 8.30.95 The applicant has indicated an intention to provide a level of each product in the latter phases of the development if possible but given the early infrastructure costs, and the scale of the Junction 10 contribution, the applicant cannot commit to providing for these two house types in the development. It is noted that the two relevant policies for these types of housing (WEL17& WEL36) both expect the delivery of Lifetime Homes and Passivhaus unless it is not viable to provide them.
- 8.30.96 Whilst Officers accept that neither form of housing can be required within the first 2,000 housing units, Officers believe that it would be appropriate to consider this aspect again at viability reviews following the full recovery of HIG. Such an approach would be consistent with Policies WEL17 and WEL36
- 8.30.97 With the applicant's Junction 10 contribution potentially increasing to £50M, no CIL contribution, no Passivhaus and Lifetime Homes coupled with the provision of affordable housing, as described above, the profit on cost for the development is 1.5%. This level of developer's return is far below the accepted market norm of 15-20% GDV. In this case, the applicant is willing to take this risk in order to ensure delivery of Welborne, on the basis that a further reduction in the level of affordable housing is permitted if HCC require the applicant to pay the cost over-run contribution in whole or part.
- 8.30.98 Through future planning viability reviews following the full recovery of HIG, this council will have a choice about what should be provided if the scheme begins to make higher profits. These choices are to increase the number of affordable housing units, vary the affordable tenure or deliver Passivhaus homes or lifetime homes, or a combination of any of these.
- 8.30.99 Officers consider that the proposal accords with the policies and guidance set out in the National Planning Policy Framework and the National

Planning Practice Guidance and the relevant policies of the Welborne Plan, with the potential exception of part of WEL18. For the reasons set out above, Officers believe the fact that the proposal may become contrary to Policy WEL18 in part is acceptable.

8.31 Housing

8.31.1 Market Housing

Policy WEL17 seeks to secure a mix of good quality market housing at Welborne suitable for a wide range of different households including younger and older families, single people, retired people and those with reduced mobility.

8.31.2 Given that Welborne is phased for delivery over more than twenty years it is important to ensure that the mix of housing being delivered is flexible to meet the needs of the local market throughout the delivery period. As such policy WEL17 does not prescribe a certain housing mix or specify the number of each unit. The mix of market homes to be provided within each main residential neighbourhood will be required to reflect the demand at that time as each phase comes forward.

8.31.3 Policy WEL17 also seeks to secure at least 15% of the market dwellings as Lifetime Homes. This matter is discussed further below.

8.31.4 Given the outline nature of this application the provision of a mix of market homes will be secured through the submission and determination of the reserved matter applications. On this basis the proposal is considered to be acceptable and compliant with policy WEL17.

8.31.5 Affordable Housing

Policy WEL2 requires the development to create an inclusive community with each phase of the development providing for a range of housing types, sizes and tenures including affordable housing to meet the needs of the community. The overall aim of the policy is to deliver 30% affordable housing, subject to development viability and funding being available.

8.31.6 Affordable housing is specifically dealt with by policy WEL18. The headline of the policy is that Welborne shall provide 30% affordable housing.

8.31.7 Policy WEL18 continues that in exceptional circumstances, where viability allows a reduction in affordable housing to 10% could be acceptable. Where it is agreed that a phase would not reach 30% WEL18 requires that the subsequent phases(s) will be required to meet the shortfall in addition to their own 30% but only again, if viability allows.

8.31.8 Fareham Housing has advised that it is not supportive of the current

position proposed by BDL in June 2021. From an affordable housing perspective, they could not support any further reduction in affordable housing provision at the site. Previous compromises have been made around tenure mix and the minimum level of affordable housing (reduced to 10%), to ensure the development is viable.

- 8.31.9 Whilst the position of Fareham Housing is noted, the discussion and officers' conclusions in respect of the proposed quantum is set out in the Viability section of the report which immediately precedes this section of the report.
- 8.31.10 In summary it is regrettable that the proposal provides for only 10% affordable housing (and potentially 7.3% if HCC require the full payment of the £10M cost over-run contribution) and therefore reaching the policy aspiration of 30% is likely to be highly challenging. However, policy WEL18 envisaged occasions such as this whereby scheme viability necessitates that a lesser proportion of affordable housing has to be delivered. The development economics indicate that the profit return to the developer would only be 1.5% when 10% affordable housing is provided. To maintain a profit of at least 1.5% if the Junction 10 cost over-run contribution is paid, would require a further reduction in affordable housing. A profit level of 1.5% is well below the market norm such that most developers would not be willing to proceed on this basis. The commitment by BDL to provide 10% as a minimum across the scheme is considered by Officers to accord with policy WEL18. Affordable housing provision below 10% would be contrary in part of Policy WEL18, and Officers have previously set out why they consider a reduced level of provision acceptable in planning terms.
- 8.31.11 Policy WEL18 also requires the initial tenure split to be 70% affordable or social rent and 30% intermediate tenures such as shared ownership properties. It states "*The initial tenure split will be 70% affordable or social rent and 30% intermediate tenures. The tenure split will be kept under review phase by phase based on evidence of need and viability.*" Discussion and officers' conclusions in respect of the tenure split for the first 2,000 dwellings is also set out in the Viability section of the report.
- 8.31.12 Fareham Housing has no objection to the earlier phases of the development having a revised tenure split as they recognise that it will facilitate the delivery of 10% affordable housing in line with policy requirements
- 8.31.13 Fareham Housing also recognise that the earliest phases of Welborne (when the supporting services and infrastructure are still coming to fruition) may not be as suitable for some of the households waiting for affordable/social rent properties due to the location being detached from social support networks and family relationships. As such, Officers consider the proposed tenure mix to be acceptable for the first 2,000 houses.

- 8.31.14 It remains the long-term intention of the Council to achieve a 70:30 tenure split as per the requirements of policy WEL18 in future phases of Welborne. The legal agreement will ensure that, subject to viability, the tenure split for the remaining affordable housing dwellings is kept under review and will respond to the council's need for the types of affordable housing in the borough. In this regard, with the legal agreement, the tenure split is considered acceptable and to accord with this part of policy WEL18.
- 8.31.15 Policy WEL18 goes on to state *"a range of affordable housing types, sizes and tenures shall be delivered within each residential phase. The precise number and mix of affordable homes within each phase shall be agreed with the Council, having regard to the nature of the phase to be developed, the identified need for affordable homes and its viability at the time the phase comes forward."*
- 8.31.16 The delivery of Welborne over a number of years will require an ongoing dialogue between the applicant, the Planning Authority and with Fareham Housing. In terms of the mix of sizes of the Social/Affordable Rent properties the requirements could change over the lifetime of Welborne, therefore the legal agreement will allow for the mix to be reviewed at the reserved matter stages so that it remains reflective of local need at the time.
- 8.31.17 In terms of the mix of sizes for the intermediate products (such as Shared Ownership) Fareham Housing advise that there can be more flexibility than for the Affordable Rent as market influence and buyer choice can impact on the need.
- 8.31.18 In terms of property mix for intermediate products (such as shared ownership) the approximate mix will include: 20-25% of 1 bed homes, 40-50% of 2 bed homes, 20-25% of 3 bed homes and 5-10% of 4 bed (or larger) homes. This is based on an analysis of Help to Buy South information by Fareham Housing. Fareham Housing advise that there can be more flexibility on the mix of this provision than the Social/Affordable Rent as there is market influence and buyer choice which can impact on the need.
- 8.31.19 The applicant has agreed to the provision of Affordable Rent and Intermediate Housing for the first 2,000 houses at the mix recommended by Fareham Housing. The delivery of the affordable homes will be kept under review to ensure that the local need is met throughout the construction period.
- 8.31.20 On the basis that the scheme viability will be reviewed to ensure that the affordable housing provision is policy compliant the proposal is considered to be acceptable
- 8.31.21 Wheelchair accessible homes

Policy WEL20 specifically seeks to ensure that within each residential phase of development at Welborne that adequate provision is made for homes that are suitable for occupation by wheelchair users. The precise proportion of homes built to this standard will be reflective of the need at that time. The Welborne Plan anticipates the level of wheelchair adapted homes to be around 2%. As such the finer detail regarding size, form and location of the wheelchair accessible housing will be considered as the reserved matter applications come forward and through negotiation with the officers at Fareham Housing and other relevant stakeholders. The provision of wheelchair accessible homes will be secured via planning condition.

8.31.22 Lifetime Homes & Passivhaus

Lifetime Home standards are different to a wheelchair accessible home. A wheelchair accessible home is a home built specifically to accommodate a wheelchair user at the time of occupation. A lifetime home is a dwelling constructed whereby the building goes beyond the current building regulation requirements by ensuring that the available space within the new home can readily accommodate, or be easily adapted, to meet the future needs of the occupants, including those with reduced mobility.

8.31.23 Policies WEL17 (Market Housing) and WEL18 (Affordable Housing) both seek to secure approximately 15% of homes within each phase of residential development to be constructed as lifetime homes (or equivalent government standard.) The precise proportions and location of the lifetime homes standard properties shall reflect the demographics of the population and the identified need at the time the dwellings come forward. Furthermore, the policies both seek to ensure that the provision of this quantum and type of dwelling does not render the phase economically unviable.

8.31.24 Policy WEL17 states that the provision of Lifetime Homes is subject to the need to ensure that the phase remains economically viable. As set out above in the viability section of this report, this type of building adds a premium to the build costs such that zero Lifetime homes are proposed for the development by the applicant due to the development economics as set out in the Viability Section of this report.

8.31.25 Policy WEL36 of the Welborne Plan requires applications to be supported with an energy statement which looks to optimise the energy efficiency of buildings through the layout, orientation and use of low or zero carbon technologies and building methods. The policy also requires applicants to demonstrate how high energy efficiency standards will be achieved including meeting the Passivhaus standard. Policy WEL36 also requires the development of Welborne to incorporate 10% of dwellings to be built to a Passivhaus Standard unless it can be demonstrated to be unviable and what the maximum proportion of dwellings built to this standard will be.

- 8.31.26 The application is supported by a broad and strategic Site Wide Energy Statement which sets out the broad aspirations for the delivery of sustainable homes at Welborne. Given the outline nature of the application each reserved matter application will require the submission of a more detailed and application specific energy statement to articulate how the detailed buildings will deliver a sustainable and energy efficient development. This is addressed by a planning condition as part of the recommendation.
- 8.31.27 Passivhaus is an energy, comfort and quality standard that goes beyond the current Building Regulations. To date in excess of 1,000 Passivhaus homes have been completed in the UK, mostly as affordable housing but with some Passivhaus housing for sale. A true Passivhaus must be certified by a Passivhaus Certifier and verified by the Passivhaus Institute in Germany, who own and developed the standard.
- 8.31.28 Due to viability considerations, no Passivhaus homes are proposed during the development by the applicant.
- 8.31.29 The viability review mechanism process is designed to enable the Borough Council to exercise its preference of how additional housing should be delivered. Up until the HIG funding has been repaid in full, the viability review mechanism will have the flexibility to deliver more affordable housing and/or change the tenure mix. Following full repayment of the HIG, viability review mechanisms will be able to look at not only more affordable housing and changes to the tenure mix but also whether to provide other house types such as passivhaus or lifetime homes. On this basis the provision of zero passivhaus homes and lifetime homes for the first 2,000 homes is considered acceptable by Officers, but the viability review mechanism will keep the potential for future delivery of these types of building under review.
- 8.31.30 Custom Build Housing
- Welborne will provide an opportunity for people to build their own homes. The Welborne Plan sets out that whilst the custom build market is a small part of the housing provision at Welborne it is an important part and that the Council is keen to encourage this type of development in order to encourage a balanced housing market.
- 8.31.31 A proportion of homes are to be delivered in the form of dwelling plots for sale to individuals or groups of individuals who wish to build their own homes. Overall, policy WEL21 expects that no less than 1% of all homes at Welborne should be delivered as custom-build plots.
- 8.31.32 Given that the application is made in outline only, the finer detail of where the custom build housing will be located and distributed through the site will be a matter for consideration as the reserved matter applications come forward. The application indicates that the policy of 1% can be met.

On the basis that the policy requirement for no less than 1% of the dwellings built are to be custom build homes is achieved then the policy is considered to have been complied with. The required provision of custom build homes is secured through planning condition.

8.31.33 Specialist Accommodation for the Elderly

Policy WEL19 specifically addresses the need for Welborne to provide specialist accommodation for older people. The Policy sets out that permission will be granted for this type of accommodation where it is located within the district or local centre; is fully integrated with the rest of Welborne and the green infrastructure network; allows easy access to public transport and provides sufficient parking for residents and staff. The policy also requires the provision to meet the needs of those older people in the Borough who cannot afford private market specialist accommodation. Policy WEL19 aims to achieve the completion of at least one extra care or similar scheme by the end of the third phase.

8.31.34 The application includes provision for a care home and the submission acknowledges the need for the facility to be located at one of the centres at Welborne. The final location will be determined in the future reserved matter applications. The applicant's IDP indicates that the specialist older persons accommodation could be provided over three sites. Each facility is initially envisaged as 100 residential units and will form a component part of the site wide housing proposals delivered in line with housing build out during each sequence.

8.31.35 Hampshire County Council has indicated its broad support for the applicant's proposal and requests that an extra care scheme is provided of 100 units. HCC indicates that, consistent with the policy, that this would constitute part of the overall affordable housing percentage across the site where the relevant units are offered as affordable homes. The County Council has indicated that any extra care scheme should comprise a mix of one and two-bedroom self-contained flats at a scale that would command a mix of tenures of typically 70% affordable rent and 30% shared ownership.

8.31.36 It is accepted that if a proportion of the extra care units are secured for affordable homes then this would contribute towards the affordable housing provision at Welborne as required by policy WEL18. However in light of the reduced quantum of affordable housing now proposed by the current revisions to the application and the minimum size for an extra care facility being no less than 60 units, this type of facility would absorb a significant proportion of the affordable homes now being provided.

8.31.37 As such and following further discussions between Officers, HCC and BDL, the legal agreement seeks for the three parties to meet prior to the first viability appraisal stage to review the need, viability and desirability for delivering an extra care facility. These meetings will continue annually thereafter up to the final viability review stage and if such an opportunity

arises as the development progresses then the Council, in consultation with HCC, will seek to secure such a facility in the subsequent phases of development. However, should the opportunity not arise then the Council would wish to see the delivery of affordable homes in the manner set out above in the Affordable Homes section of this report. This would include an element of elderly accommodation, rather than explicitly as extra care. This approach would still allow for the opportunity to provide extra care and as such the proposal would continue to meet the requirements of Policy WEL19.

8.31.38 However, in the balancing of the viability issues and the need to deliver as much affordable housing as is now possible, the concentration of that affordable housing into an extra care scheme means that the applicant cannot commit at this point to an extra care scheme and the Borough Council would prefer to see affordable housing more distributed through the site in the mix identified earlier in the report. Fareham Housing has reviewed this approach and is content that the affordable housing provision can provide for some units for the elderly with the review mechanism potentially allowing for future opportunities for extra care as and when viability allows.

8.31.39 Should an extra care facility be provided in the future the suggested locations of the proposed development at the defined centres is supported and given the arrangement of the green infrastructure and public transport links on the submitted parameter plans, the proposal would accord with the requirements of WEL19 at this outline application stage. The opportunity to review the development and secure extra care provision where feasible and viable will be secured through the legal agreement.

8.32 Planning Balance

8.32.1 The proposed development is broadly considered to accord with The Welborne Plan as a whole. As described above at the start of the 'Planning Considerations' section of this report, the Committee also needs to be mindful of any other material considerations in their decision making, such as the NPPF.

8.32.2 Members of the Planning Committee are aware that the Council is currently unable to demonstrate a five year housing land supply position. A report titled "*Five-year housing land supply position*" was reported to Member's in June 2020. That report set out this Council's local housing need along with this Council's current housing land supply position. The report concluded that this Council has 4.03 years of housing supply against the new 5YHLS requirement This remains the Council's most up to date available information.

8.32.3 Paragraph 11 of the NPPF clarifies the presumption in favour of sustainable development in that where there are no relevant

development plan policies, or the policies which are most important for determining the application are out-of-date, permission should be granted unless:

- the application of policies in the Framework that protect areas of assets of particular importance provides a clear reason for refusing the development proposed; or
- any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole.

8.32.4 The approach detailed within the preceding paragraph, has become known as the 'tilted balance' in that it tilts the planning balance in favour of sustainable development and against the Development Plan.

8.32.5 This test in the NPPF is considered to be engaged as this Council cannot demonstrate a 5YHLS. As such, when taking its decision, given the demonstrable lack of a five-year housing land supply position in the Borough, the Planning Committee should give weight to the advice in the NPPF as a material consideration.

8.32.6 In bringing all the above issues together this final part of the report will assess whether there is any significant and demonstrable harm that would outweigh the benefits of granting a planning permission for Welborne.

8.32.7 The Benefits

The proposals would deliver up to 6,000 new dwellings which will help meet the housing need in the Borough. Furthermore in a large-scale development such as this is supported as an approach in the NPPF. Paragraph 72 of the NPPF advises that new settlements can often be the best way of delivering large scale developments providing the necessary infrastructure is in place. The same paragraph of the Framework also seeks to set clear expectations for the quality of new developments at scale such as following garden city principles.

8.32.8 Welborne will be a distinct new community with a modern interpretation of the garden village principles. As such this accords with the advice in the NPPF for delivering new large scale housing proposals; the alignment with the NPPF and specifically the need to secure design to garden city principles is a weighty benefit in favour of the scheme.

8.32.9 Within the above report it is set out that the application proposes the delivery of 34% of the budget for site infrastructure for only 16% of the overall housing proposed. This high level of early infrastructure cost outlay also reflects the NPPF advice that largescale housing developments are suitably supported by the necessary infrastructure and facilities. This early delivery of significant infrastructure must weigh in

favour of the scheme.

- 8.32.10 Part of the early infrastructure delivery is the provision of an 'all moves' Junction 10. Policy WEL24 of the Welborne Plan seeks to upgrade Junction 10 of the M27 to an 'all moves' junction. However, despite being part of the Welborne development, the provision of the junction is likely to also have a significant wider public benefit to the Solent region by increasing opportunities to access the strategic road network.
- 8.32.11 It is a long standing corporate priority that the Council will seek to provide residents with access to good quality housing that is affordable and offers a choice of tenures. The minimum 10% level of affordable housing for the development is considered to be acceptable and as detailed above, suitable viability review mechanisms from 2,000 units onwards will ensure that where viability allows future increases in the provision of affordable housing are secured. The provision of affordable homes, even at 10% (and potentially 7.3% if HCC require the full payment of the £10M cost over-run contribution), will still contribute towards the clearly identifiable priority in the Council's Corporate Strategy as well as facilitating the wider delivery of Welborne. This weighs in favour of the scheme.
- 8.32.12 Added to the delivery of affordable homes is an opportunity for people to build their own homes through the custom build provision which is encouraged as a source of supply by the Government and for which there is an unmet need in the Borough.
- 8.32.13 The proposal will deliver a significant employment offer and create multiple economic opportunities with companies locating in the employment areas but also employment opportunities at the Centres, schools, sports hub and during the period of construction and thereafter. Once the retail units are open within the centres the generation of household expenditure would further help support the local economy and the provision of jobs at Welborne.
- 8.32.14 The Council is working corporately with others, as set out within the Corporate Strategy, to support and promote the economic vitality of the Borough. As set out above in the report, the early delivery of some of the employment land at Welborne will help with this vitality whilst potentially also being to the benefit of the wider Solent region. This wider benefit is a positive to be taken from the Welborne development.
- 8.32.15 Welborne will deliver a significant quantum of green infrastructure with a number of formal sporting opportunities throughout the site as well as informal areas, play areas, off road foot and cycle paths and substantial tree lined streets. This green infrastructure will help achieve a modern take on the traditional garden village and is a further benefit of the proposal. The provision of leisure opportunities so that residents can socialise together with other members of the community will help ensure that Welborne has a real sense of place. This provision of leisure and

health opportunities also reflects the Council's Corporate Strategy.

8.32.16 Amenities such as childcare and education establishments will be central to the success of Welborne in creating civic spaces and having a diverse community. The provision of these amenities on site, alongside the commercial and residential development will help generate a high level of self-containment as is required by the Welborne Plan. The provision of these facilities weigh in favour of the scheme.

8.32.17 The provision of a Health and Wellbeing Hub will play a role in the creation of Welborne as a Place. Providing flexible clinical space could enable a holistic approach to health service provision for the new community which could include locally commissioned services with nationally commissioned primary care services (ie. Dental; Pharmaceutical and Optometry) to be provided alongside Local Authority; social care; and or public health services. This type of facility provided on site will further benefit the community with amenities close and accessible. This provision weighs in favour of the scheme.

8.32.18 Sites of Alternative Natural Green Space (SANG) are secured and to be managed in perpetuity to ease the recreational pressure on our sensitive coastal habitat such that the impacts of the development on the internationally important wildlife sites within proximity of the site are accepted. It is a priority within the Corporate Strategy that the Council will make sure that our heritage and natural environment are conserved and enhanced for future generations. The suitable management of the SANGS through the Welborne Garden Village Trust will ensure our internationally important coastline is preserved. The in-perpetuity management of the SANGS and other green infrastructure, will ensure that the impacts of the proposal are suitably mitigated.

8.32.19 All of the above benefits weigh heavily in favour of the scheme.

8.32.20 The Harm

The request of the Portsmouth Hospitals NHS Trust and that from University Hospital Southampton for financial contributions are noted and are a material planning consideration.

8.32.21 It is the UHS and Portsmouth Hospital NHS Trust's position that some harm to hospital services would arise as a result of not securing the requested contributions. As detailed earlier in this report however the scheme is not considered to be unacceptable in the absence of the requested contribution being secured such that the proposed contribution is not accepted.

8.32.22 Notwithstanding this conclusion, had the contribution been found as necessary it is recorded in the application and in this report that the viability of Welborne is a significant material consideration in respect of the delivery of Affordable Housing, Passivhaus and Lifetime Homes

which are all sought in the Welborne Plan.

- 8.32.23 Given the requested combined contribution comes close to £6,000,000 this would need to be weighed in the balance with the other items of infrastructure required at Welborne. When considered in the round it is concluded that the contribution would not have been secured in any event. To secure such a contribution would be to the detriment of the provision of other necessary infrastructure at Welborne and to the delivery of much needed affordable housing.
- 8.32.24 In this case the harm identified by the two hospitals is not considered to be clearly articulated and evidenced. As a consequence, any harm is not considered to be so significant that the other policy requirements of the scheme should be sacrificed to satisfy the hospitals' requests.
- 8.32.25 The second limb of the healthcare consideration is that of the on site health provision. The CCG has indicated that if acceptable terms cannot be made for provision on site then it is highly probable that the CCG will not be able to secure provision of the NHS general Practice services located within Welborne. The absence of an onsite health facility would weigh against the scheme.
- 8.32.26 There is no development plan policy to provide for off-site healthcare. The provision for health secured as part of any planning permission should be appropriate to address the requirements of new population through the onsite provision. To have the new population at Welborne being served by off site health infrastructure in its totality would be to the detriment of the new community.
- 8.32.27 The proposal seeks to remove the limited amount of established on-site planting, specifically alongside the existing Knowle Road and around the Dean Farm Estate. Retention of this landscape would help provide an established and mature green corridor through the site and avoid the need for future mitigation planting. Added to the landscape relevance of the Knowle Road planting it is also noted that it has an ecological function for various species of wildlife and protected species.
- 8.32.28 However, given the extent of Welborne, the extensive GI network to be provided and the large areas of SANG provision the loss of on site, existing landscaping, is not of such significant harm that it outweighs the identified benefits and would warrant refusal of planning permission.
- 8.32.29 It is accepted that there is an unmitigated loss of Best and Most Versatile Agricultural Land (B&MVAL) and that this is a negative to be weighed against the scheme. However this loss is long acknowledged by the Council. Furthermore, the Inspector, in finding the Welborne Plan sound, found that "...it will not be possible to fully heed every specific piece of advice in the NPPF[such as the benefits that high quality agricultural land has and that these benefits should be taken into account]. However,

taken as a whole, I am satisfied that the Council has adopted an appropriate balance between competing requirements and I therefore conclude that the proposed boundary of Welborne is justified and in all respects sound” (para 27, Inspectors Report into the Welborne Plan).

- 8.32.30 There is no material change in the condition of the land since the Examination into the Welborne Plan and the NPPF, even in its revised form, still promotes the importance of B&MVAL and its contribution to the intrinsic character and beauty of the countryside. However, when balanced with the other elements of the scheme this loss of B&MVAL is considered to be acceptable and it would not of itself amount to such significant harm that this issue would outweigh the benefits of the application.
- 8.32.31 The application site is a significant area of undeveloped, primarily agricultural land. The development on such land will have an adverse impact upon the rural landscape and this has to be acknowledged as one of the dis-benefits of Welborne.
- 8.32.32 However, Welborne, as is set out at the start of this report, has been in the planning for a number of years and the Welborne Plan has been found sound. As such, the allocation of the site for housing is well established and the principle of development, with associated landscape impact, accepted. On this basis the level of landscape harm has been long accepted such that the benefits to be provided above are considered to outweigh this landscape harm.
- 8.32.33 The Waste Safeguarding in Hampshire SPD (produced by HCC as Mineral and Waste Authority), states that minerals safeguarding at a site is not intended to prevent development but allows for the consideration of the safeguarded resource in terms of the resource demand and processing capacity locally, the requirement for new development, taking account of the geographical, environmental, socio and economic conditions.
- 8.32.34 In the context of a lack of capacity at the Michelmersh brickworks to store large quantities of clay on-site and it potentially requiring clay from the Welborne site for many years, the merits of the development are considered to outweigh the safeguarding of the clay of brickmaking quality at the site, given the importance of delivering critical housing and employment at the site.
- 8.32.35 As detailed earlier in the report the setting of listed buildings are affected by the proposal. Consistent with the NPPF, it is considered that the proposals will result in some harm to the setting of these buildings and their significance. The harm however, is appropriately mitigated by the parameter plans identifying that there will be the siting of buildings far enough away and at such a scale that the harm is “less than substantial”. Whilst the harm is less than substantial the fact that harm arises still requires an assessment as to whether that harm is outweighed by the

public benefit of the scheme as a whole (NPPF para.196).

8.32.36 The proposed road to the east of the Knowle Roundabout is identified in the above report as being on land outside the Welborne Plan allocation boundary. This road, it is concluded, would not typically be considered as an acceptable form of development in the countryside as provided for by policy CS14. The principle of this development in the countryside is a departure from the adopted policy CS14. There is no adverse landscape harm from the provision of this road such that it is considered to be outweighed by the benefits of the proposal.

8.32.37 Conclusions

Throughout this report, Officers have carefully assessed the proposals against the provisions of the development plan. Officers have also given due regard to the current 5YHLS position.

8.32.38 In undertaking this detailed assessment and when applying the NPPF paragraph 11 'tilted balance' it is considered that there are substantial benefits that flow from the proposal. The benefits identified accord with the requirements of the Welborne Plan and also satisfy the social, economic and environmental strands of sustainable development identified in the NPPF. The benefits are considered to be numerous and significant and are not outweighed by any identifiable harm. As such any adverse impacts of granting planning permission would not significantly and demonstrably outweigh the benefits. For all the above reasons, on balance, the proposal is considered to be acceptable as set out in the recommendation below.

9.0 Conclusion

9.1 Having carefully considered all material planning matters, consultations and representations received; Officers recommend that outline planning permission should be granted as set out in the recommendation below.

10.0 Recommendation

10.1 Confirm the report at Appendix A including the Applicant's document titled "Welborne Shadow Appropriate Assessment UPDATE", dated November 2020 comprises the Council's Habitats Regulation Assessment;

Then

10.2 Delegate to the Head of Development Management to take receipt of the final written comments of any further outstanding consultation responses with the inclusion of any further conditions or informatives that may be recommended;

and

10.3 Delegate to the Head of Development Management in consultation with the Solicitor to the Council for the prior completion of a legal agreement pursuant to Section 106 of the Town and Country Planning Act 1990 to secure:

- The creation of an Estate Management Company;
 - Inclusion of FBC on the board of the Company;
 - Service charge arrangements;
 - Step in provisions;
- The appointment of a New Community Development Worker for a period of not less than ten years;
- Provision for an Education Steering Group;
- Contribution and land for the delivery of three primary schools;
- Contribution and land for the delivery of one secondary school;
- A Community Use Agreement(s) for the school(s) facilities for public use outside of the times needed for educational use;
- Nursery and pre school marketing strategy;
- Provision of the Local Centre;
- Local Centre Community Building;
- Provision of the District Centre;
- District Centre Community building
- Provision of healthcare facilities;
- Provision of the Community Hub;
- Delivery of Green Infrastructure (GI) – to include:
 - All Weather Pitch;
 - Tennis Courts;
 - Local Play Space;
 - Neighbourhood Play Space;
 - Youth Play Space;
 - Playground Play Equipment;
 - Parks and Amenity Open Spaces;
 - Playing Pitches and Outdoor Sports Facilities;
 - Allotments; and
 - Semi Natural Greenspace;
- GI Delivery and management arrangements;
- Delivery of the Temporary SANGS Strategy;
- Provision of Sites of Alternative Natural Green Space (SANGS);
- In perpetuity management of SANGS including step-in rights by the Estate Management Company;
- SRMP Contribution;
- Public Transport – BRT provisions on site and contributions;
- Safeguarding of the Rail Halt Land
- A32 access works;
- Off site Highway Works Contributions for locations identified by HCC;
- Applicant's £40 million contribution towards the cost of junction 10;
- Proportionate reduction of affordable housing in the event that the applicant makes a financial contribution towards Junction 10 cost overruns up to a total of £10m;

- Off site Local Highway Network mitigation and safety schemes;
- Framework residential travel plan;
- Neighbourhood travel plans;
- Framework employment travel plan;
- Safeguarding the land for the Household Waste Recycling Centre;
- Contribution towards the Household Waste Recycling Centre to include a proportionate cost of the legal fees;
- Affordable housing:
 - Amount;
 - Tenure;
 - Upward review mechanisms;
 - Wheelchair accessible homes;
- Self Build Housing;
- Passivhaus where viability allows;
- Lifetime homes where viability allows;
- Extra Care accommodation where viability allows;
- Mechanism to recover and recycle HIG Funding in accordance with Homes England's requirements (subject to approval by this Council's Executive);
- Business incubation centre;
- Employment and training plan for construction;
- Equalisation arrangements for the Sawmills site;
- Public access to the site;
- Improvements to existing rights of way;
- Closure, stopping up and diversion of existing rights of way;

10.4 Delegate to the Head of Development Management:

- To make any necessary modification, deletion or addition to the proposed conditions or heads of terms; and
- To make any necessary changes arising out of detailed negotiations with the applicant which may necessitate the variation, addition or deletion of the conditions and heads as drafted to ensure consistency between the two sets of provisions

And then;

10.5 Grant **OUTLINE PLANNING PERMISSION subject to the following conditions:**

GENERAL CONDITIONS:

- 01 a) The development granted permission by this decision for the highway improvement works (J10 or A32 improvement works) shall be begun not later than three years from the date of this permission.**
- b) The first application for approval of reserved matters shall be made to the Local Planning Authority before the expiration of 5 years from the**

date of this permission. All subsequent reserved matters pursuant to this outline shall be submitted no later than 30 years from the date of this permission.

c) The development of any reserved matters related to this Outline planning application shall be begun before the expiration of three years from the date of approval of that reserved matters.

REASON: To allow a reasonable time period for work to start, to comply with Section 91 of the Town and Country Planning Act 1990, and to enable the Council to review their position if a new application is made following expiry.

02 The development shall be carried out substantially in accordance with the following approved drawings:

- Application Boundary Parameter Plan - 60469153-001-A0
- Access Roads and Junctions Parameter Plan - 60469153-002-A4
- Land Use Parameter Plan - 60469153-003-A4
- Residential Density Parameter Plan - 60469153-004-A4
- Building Heights Parameter Plan - 60469153-005-A4
- Open Space and Green Infrastructure Parameter Plan - 60469153-006-A4

Any variations to any or all of these Plans must first be submitted to and approved in writing by the Local Planning Authority.

REASON: The distribution of land uses on the parameter plans is the subject of an Environmental Impact Assessment and any material alteration to the layout may have an impact that has not been assessed by that process. To ensure a comprehensive and appropriate form of development and to avoid any doubt over what has been permitted

03 The development shall be carried out substantially in accordance with the submitted Structuring Plan (July 2019), and the high-level development principles within it. Any variations to this Structuring Plan must first be submitted to and approved in writing by the Local Planning Authority.

REASON: to ensure a comprehensive and appropriate form of development and to avoid any doubt over what has been permitted

04 The development will be carried out in accordance with:

A32 Drawings:

- A32 Overview General Arrangement - 6091/GA/299 Rev E
- A32 General Arrangement - Surfaces and Finishes - North Roundabout - 6091/GA/311 Rev G
- A32 General Arrangement - Surfaces and Finishes - Knowle Roundabout - 6091/GA/321 Rev F
- A32 General Arrangement - 6091/GA/332 Rev B

- A32 General Arrangement - Surfaces and Finishes - Phase 2 - Central Av RAB - 6091/GA/341 Rev F
- A32 General Arrangement - Surfaces and Finishes - Phase 1 - Temporary Left in-Left out - 6091/GA/3410 Rev F
- A32 General Arrangement - North Hill Junction - 6091/GA/1005 Rev H

M27 Junction 10 Drawings:

- CJ008926-ATK-HGN-J10-DR-CH-000002_C04 - Overview General Arrangement
- CJ008926-ATK-HGN-J10-DR-CH-001001_C02 - General Arrangement (Sheet 01 of 03)
- CJ008926-ATK-HGN-J10-DR-CH-001002_C03 - General Arrangement (Sheet 02 of 03)
- CJ008926-ATK-HGN-J10-DR-CH-001003_C03 - General Arrangement (Sheet 03 of 03)

REASON: To Avoid any doubt over what has been permitted.

- 05** No development shall take place related to the A32 junctions, or M27 J10 until details of the proposed landscaping in relation to the individual works proposed has first been submitted to and approved in writing by the Local Planning Authority. Such details will include any changes to ground levels, the species, planting sizes, planting distances, density and numbers of any new planting, an implementation plan and details for the ongoing long term management and maintenance of the planting. The landscaping will be provided and maintained in accordance with the approved details and implementation plan. Any plants or species that fail, die, or in the opinion of the Local Planning Authority are damaged or are removed within the first five years following their planting will be replaced in the next available planting season with a species of similar size and type.

REASON: to ensure a comprehensive and appropriate form of development

- 06** No development shall take place related to the A32 junctions, or M27 J10 until details of the proposed street lighting in relation to the individual works proposed have first been submitted to and approved in writing by the Local Planning Authority. Such details will include specifications, lighting calculations and contour illumination plans. The development shall be carried out in accordance with the approved details.

REASON: to ensure a comprehensive and appropriate form of development

- 07** The development for the following uses will not exceed:

- 3,200m² food store retail (A1)
- 3,500m² of non-food retail (A1)

- 3,300m² of other non-convenience/comparison retail use (A1 – A5)
- 30,000m² of commercial and employment (B1)
- 35,000m² of general industrial use (B2)
- 40,000m² of warehousing space (B8);

REASON: The distribution of land uses on the parameter plans is the subject of an Environmental Impact Assessment and any material alteration to the layout may have an impact that has not been assessed by that process. To ensure a comprehensive and appropriate form of development and to avoid any doubt over what has been permitted. In the interest of protecting the vitality and viability of Fareham Town Centre and other surrounding centres in Fareham and surrounding Districts.

- 08** Notwithstanding the provisions of any Schedule of the Town and Country Planning (Use Classes) Order 1987, or in any provision equivalent to that Class in any statutory instrument revoking and re-enacting that Order with or without modification, the premises identified for such uses as stated in condition 07 shall only be used for those purposes.

REASON: The distribution of land uses on the parameter plans is the subject of an Environmental Impact Assessment and any material alteration to the layout may have an impact that has not been assessed by that process. To ensure a comprehensive and appropriate form of development and to avoid any doubt over what has been permitted. In the interest of protecting the vitality and viability of Fareham Town Centre and other surrounding centres in Fareham and surrounding Districts.

- 09** Prior to the approval of the First Reserved Matters application, a site wide (as defined in the approved Application Boundary Parameter Plan - 60469153-001-A0) Strategic Design Code shall be submitted to and approved in writing by the Local Planning Authority. The Strategic Design Code will include:

- Details and Plan of the expected Neighbourhoods
- General Design Principles for each character area
- Open Space and Play Space Strategy
- Identification of areas which may have specific Neighbourhood Design Code requirements, with specific characteristics in relation to heritage, landscape, ecology or character

This Strategic Design Code will be substantially in conformance with the approved Structuring Plan. Any variations to this Design Code must first be submitted to and approved in writing by the Local Planning Authority. The development shall be carried out substantially in accordance with the approved details.

REASON: to ensure a comprehensive and appropriate form of development

- 10** Prior to the approval of the First Reserved Matters Application, a Street

Design Manual shall be submitted to and approved in writing by the Local Planning Authority. This Street Design Manual shall include:

- **Street Design Principles for the street network**
- **General Street Design Principles for the other internal road network**
- **Timescales for the delivery of the primary street network**
- **Adoption Strategy**
- **Parameters and details of the main north to south route through the site, including link capacity, frontage activity, on-street parking provision / restriction, adoption strategy, timescale for delivery, number of junctions, minimum centreline radii, footway details, cycleway details, public transport / BRT details, typical plans, typical sections and typical junction arrangements**

This Street Design Manual will be substantially in conformance with the approved Structuring Plan. Any variations to this Design Manual must first be submitted to and approved in writing by the Local Planning Authority. The development shall be carried out substantially in accordance with the approved details.

REASON: In the interest of a suitable carrying capacity being provided on the internal road network and to ensure a comprehensive and appropriate form of development

- 11 In respect to the Neighbourhoods as identified in the Strategic Design Code, A Neighbourhood Design Code Document (covering, where applicable: detailed design principles, compliance schedule showing how it meets the principles of the approved scheme and documents, delivery strategy, infrastructure, open spaces, play spaces and landscaping) shall be submitted to and approved in writing by the Local Planning Authority prior to the approval of the First Reserved Matters application within that Neighbourhood (or Part thereof). The Neighbourhood Design Code documents will be substantially in accordance with the relevant Strategic Design Code. Any variations to this Design Code must first be submitted to and approved in writing by the Local Planning Authority. The Development shall be carried out in accordance with the approved details.**

REASON: to ensure a comprehensive and appropriate form of development

- 12 Prior to the approval of the First Reserved Matters Application which contains residential development, a Site-wide Housing Strategy will be submitted to and approved by the Local Planning Authority. This strategy will demonstrate how residential development will provide the delivery of, quantum of and phasing of;**

- **Market Housing;**
- **Affordable Housing, (including tenure type and mix; provisions to ensure the Affordable Housing Units are indistinguishable from**

Private Residential Units in terms of layout (including garden size), external appearance, parking provision and quality of materials; and provisions for an appropriate dispersal of the Affordable Housing Units so as to avoid excess clustering and the objectives of creating a mixed and balanced community and the management constraints of the Registered Provider but which shall not be pepper potted as single units around the Development);

- **Custom or self-build plots;**
- **Lifetime homes;**
- **Specialist accommodation for older people (including extra care);**
- **Wheelchair Adapted homes;**
- **Passivhaus Standard (or equivalent) homes;.**
- **This Site-Wide Housing Strategy will be updated as the development progresses with each update being first submitted to and approved in writing by the Local Planning Authority. The first update is to be provided prior to the commencement of the 2000th dwelling, and then prior to the commencement of the 3,000th , 4,000th , 5,000th and 5,800th dwellings, to coincide with the viability review process as detailed in the S106 agreement, unless otherwise first agreed in writing with the local planning authority.**

REASON: In the interest of providing a mixed, sustainable and diverse new community

- 13 Each Reserved Matters submission shall be in accordance with the Site Wide Biodiversity Enhancement Strategy, dated September 2020, prepared by Holbury Consultancy Service unless otherwise first agreed in writing by the Local Planning Authority.**

REASON: In the interest of maintaining and enhancing the biodiversity of the site

- 14 The development will be carried out substantially in accordance with the sequence identified within Sequencing Diagrams 001 – 005 and within the Infrastructure Delivery Plan Project Schedule, unless otherwise first agreed in writing by the Local Planning Authority as part of the approval of details submitted in reserved matters applications, Strategic Design Code or Neighbourhood Design Code documents.**

REASON: to ensure a comprehensive and appropriate form of development.

- 15 When first agreed in writing with the Local Planning Authority, a reserved matters application (containing relevant information from Conditions 16-41 of this planning permission) could be approved in advance of the approval of the Strategic Design Code document, or the relevant Neighbourhood Design Code, or Site Wide Housing Strategy or the Biodiversity Enhancement Strategy. In these circumstances, a statement justifying submission of reserved matters prior to agreement of these matters must be submitted as part of this reserved matters application.**

REASON: to ensure a comprehensive and appropriate form of development and to ensure that strategic work does not delay site works or the delivery of infrastructure to enable development on related neighbourhoods, specifically enabling works.

RESERVED MATTERS WITHIN A NEIGHBOURHOOD

- 16** An application for the approval of the following reserved matters for any area within a neighbourhood (as defined in the Neighbourhoods Plan within the Strategic Design Code) shall be submitted to and approved in writing by the Local Planning Authority and shall include, where relevant:
- Scale and external appearance including layout of the development
 - Landscaping (hard and soft), including a landscape design showing the planting proposed to be undertaken, the means of forming enclosures, the materials to be used for paved and hard surfaces and an implementation plan;
 - The design of all buildings and infrastructure, including details of materials to be used;
 - Statement of compliance with Neighbourhood Design Code.

REASON: to ensure a comprehensive and appropriate form of development

- 17** No development shall take place within a Neighbourhood (or part thereof) until details of the proposed ground and slab levels of the development in relation to existing ground levels, have been submitted to and approved in writing by the Local Planning Authority for that Neighbourhood (or part thereof). The development shall be undertaken in accordance with the approved details.

REASON: To ensure a satisfactory relationship between the built form in a neighbourhood and any adjacent neighbourhood and existing topography.

- 18** No development shall take place within a Neighbourhood (or part thereof), until an Archaeological Written Scheme of Investigation has been submitted to and approved in writing by the Local Planning Authority for that Neighbourhood (or part thereof). This scheme must include a programme of archaeological assessment for the works proposed within that Neighbourhood (or part thereof). The works shall be carried out in accordance with this approved scheme.

REASON: The site is potentially of archaeological significance and any finds and sites located within the development site will need to be recorded and kept under review

- 19** No development shall take place within a Neighbourhood (or part thereof), until:

- a) A desk-top Contamination Assessment has been submitted to and approved in writing by the Local Planning Authority for that Neighbourhood (or part thereof). Should the Contamination Assessment reveal a potential for contamination, a programme and methodology for an intrusive site investigation and an assessment of the risks posed to human health, the building fabric and the wider environment including water resources shall be submitted to and approved in writing by the Local Planning Authority.
- b) Where the site investigation and risk assessments under criterion a) identify remedial works are required, details of these works shall be submitted to and approved in writing by the local planning authority prior their installation/construction, including a programme for their implementation.
- c) The development shall not be occupied within the Neighbourhood (or part thereof) for which details under criterion b) above have been approved until there has been submitted to and approved in writing by the Local Planning Authority verification that those required remediation measures required have been fully implemented in accordance with the approved details. Unless otherwise agreed in writing with the Local Planning Authority such verification will include: as built drawings, photographs of the remediation works in progress, certificates demonstrating that imported and/or material left in situ is free from contamination.

REASON: To ensure a safe living/working environment

- 20 Development within a Neighbourhood (or part thereof) shall be monitored during construction for evidence of previously unidentified contamination. If suspected contamination is encountered then; all work must stop and no further work shall be carried out in the affected area(s) until investigation measures and remediation measures have been submitted to and approved in writing by the Local Planning Authority. The investigation and remediation measures shall be undertaken in accordance with the approved details. The development shall not be occupied within the affected area) until verification that the remediation works approved have been fully implemented in accordance with the approved details. Unless otherwise agreed in writing with the Local Planning Authority such verification will include: as built drawings, photographs of the remediation works in progress, certificates demonstrating that imported and/or material left in situ is free from contamination.

REASON: To ensure a safe living and working environment.

- 21 No piling or any other foundation designs using penetrative construction methods shall be used in any neighbourhood (or part thereof) unless details of the use of any necessary equipment/plant has first been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). The details shall include how the piling method will prevent contamination from migrating to principal

aquifers and contaminating groundwater and a noise and vibration assessment with a scheme of mitigation measures. The works shall be carried out in accordance with the approved details.

REASON: To ensure that the construction period does not have a detrimental impact on the ground water environment and the amenity of the area.

22 No development shall take place within a Neighbourhood (or part thereof) until a Construction Environmental Management Plan (CEMP) has been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). The CEMP shall set out the strategy and detailed method statements in respect of the following:

- a) Soil movement, methods of tracking soil movement and details for demonstrating soil will be suitable for use;
- b) Construction Traffic Management (to include the details of haul roads, co-ordination of deliveries and plant and materials and the disposing of waste resulting from demolition and/or construction so as to avoid undue interference with the operation of the public highway, particularly during the Monday-Friday AM Peak (0800-0900) and PM Peak (1630-1800) periods);
- c) Site Office location;
- d) Contractor parking areas for use during construction;
- e) Areas for loading and unloading;
- f) Construction lighting details;
- g) The storage of materials and construction waste, including waste recycling where possible;
- h) The storage and dispensing of fuels, chemicals, oils and any hazardous materials (including any hazardous soils);
- i) The proposed method of working (this shall include details to monitor and prevent adverse impacts to surface water, groundwater and adverse impacts caused by noise, vibration, odours);
- j) The proposed maintenance and aftercare of the site;
- k) The provision of road and wheel cleaning facilities, including any required drainage;
- l) Dust and dirt control measures;
- m) Measures to avoid impact upon the high pressure gas main where works proposed are within 15m of the main;
- n) measures to avoid impacts on the non-statutory designated sites, retained habitats and trees; and
- o) measures to minimise impacts on any existing occupied residential properties.

The works shall subsequently proceed in accordance with the approved details unless otherwise agreed in writing with the Local Planning Authority.

REASON: In the interest of managing the construction process so as to

avoid impact on the highway network and gas main and to ecological and arboricultural receptors and in the interest of the amenities of the area.

- 23** No development shall take place in any neighbourhood (or part thereof) where there are existing buildings to be demolished until a Demolition Method Statement has been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). The Demolition Method Statement shall include (where relevant) up-to-date ecology reports and mitigation strategies, the method for demolition and the arrangement for removing the demolition waste from the site. The development shall be undertaken in accordance with the approved details.

REASON: In the interest of managing the construction process so as to avoid impact on the highway network and to ecological receptors and in the interest of the amenities of the area

- 24** No materials obtained from site clearance or from construction will be burnt on the site.

REASON: To ensure that the construction period does not have a detrimental impact upon the environment or amenity of residents.

- 25** No building within 40m of the east, north or west elevations of Dean Farm House shall exceed 8.5m in height.

REASON: In the interest of preserving the setting of Dean Farm House as a Grade II* listed building.

- 26** No building within 75m of the curtilage of residential properties at Funtley shall exceed 8.5m in height.

REASON: In the interest of residential amenity and providing a suitable separation between the existing community and Welborne.

- 27** No development shall take place within a neighbourhood (or part thereof) until a surface water drainage scheme, based on sustainable drainage principles and an assessment of the hydrological and hydrogeological context of the area of development concerned has been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). The Scheme shall include:

- The critical design storm period for each attenuation feature
- Drainage areas and assumptions on impermeability
- Allowances for any future upstream development areas that contribute flows to this zone
- The methods employed to control the surface water discharge and volume
- Infiltration testing in pits (not boreholes) to support the assumed infiltration rates

- The factor of safety assumed for each infiltration feature
- The run-off rate calculations for discharge to surface waters
- Treatment measures employed to achieve the relevant water quality treatment
- Future management and maintenance responsibilities
- Details of any impacts on source protection zones or solution features

The drainage scheme submitted shall be implemented prior to the occupation or use of the building or development in which it relates. Where the drainage scheme for any area relies on drainage features outside of the area of development concerned these must be completed sufficiently to perform the necessary attenuation and treatment function, and demonstrated as part of the details submitted. No area of built development shall be allowed to discharge run-off unattenuated and untreated into receiving watercourses. The development shall be carried out in accordance with the approved details.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 28 No development shall take place within a neighbourhood (or part thereof) until details of ecological mitigation, compensation and enhancement measures have been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). Such details shall be in accordance with the sitewide Biodiversity Enhancement Strategy. The development shall be undertaken in accordance with the approved details.

REASON: In the interest of maintaining and enhancing the biodiversity around the site as a whole

- 29 No development shall take place in a neighbourhood (or part thereof) until an Arboricultural Impact Assessment and Method Statement has been submitted to and approved by the Local Planning Authority for that neighbourhood (or part thereof). These details will indicate how retained trees and hedgerows are to be protected on site. The works shall subsequently be carried out in accordance with the approved details.

REASON: In the interests of the visual amenities of the area.

- 30 Any tree and hedgerow protective measures required within a Neighbourhood (or part thereof) shall be installed prior to the development taking place. Protective fencing shall be maintained and retained for the full duration of the works or until such time as may be agreed in writing by the Local Planning Authority. No activities, material storage, or placement of site huts or other equipment what-so-ever shall take place within the fencing without the prior written approval of the Local Planning Authority.

REASON: In order to retain established landscaping on the site in the interest of the visual amenities of the area.

- 31 All service routes, drain runs, soakaways or excavations in connection with the development of a Neighbourhood (or part thereof) shall remain wholly outside the tree and hedgerow protective area unless otherwise agreed in writing with the Local Planning Authority.**

REASON: In order to retain established landscaping on the site in the interest of the visual amenities of the area.

- 32 No development shall take place within a neighbourhood (part thereof) until Foul Drainage Details for that neighbourhood (or part thereof) have been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). These will include details on connections to the existing sewerage network, and capacity details for that neighbourhood (or part thereof). The development shall be undertaken in accordance with the approved details.**

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 33 All foul sewage generated by occupied development will be disposed of utilising Peel Common Water Treatment Works unless otherwise first agreed in writing by the local planning authority.**

REASON: To ensure an appropriate and sustainable form of development and to be in accordance with the Environmental Statement in support of the application.

- 34 No development shall take place within a Neighbourhood (or part thereof) until the following details have been submitted to and approved in writing by the Local Planning Authority:**

- **The positions and widths of roads, footpaths and cycleways including gradients and surface materials for that Neighbourhood (or part thereof);**
- **details of parking provision (on and off plot) and any associated manoeuvring areas;**
- **street lighting (Including lighting calculations, contour illumination plans and means to reduce light pollution within and serving that Neighbourhood (or part thereof);**
- **public transport connections for that Neighbourhood (or part thereof);**
- **The method for managing highway surface water drainage including local sustainable disposal within and serving that Neighbourhood (or part thereof);**
- **Timetable for the delivery of the above**

The development shall be undertaken in accordance with the approved details.

REASON: To ensure that roads, footways, cycleways, street lighting and surface water drainage are constructed to an appropriate standard to serve the development

- 35 No development shall take place within a neighbourhood (or part thereof) where residential units are proposed within 60m of the A32 and/or 400m of the M27 until a scheme for sound attenuation in respect of the dwellings and their amenity space has been submitted to and approved in writing by the Local Planning Authority for that neighbourhood (or part thereof). The scheme shall assess the impact of noise from vehicles using the A32 and/or M27 and shall identify the measures necessary to attenuate against noise nuisance to future occupants, with a view to achieving the recommendations outlined in BS8233, taking into account both indoor and outdoor living areas and bedrooms. Attenuation of the buildings shall be undertaken in accordance with the approved details before the development is brought into use.

REASON: In the interests of residential amenity

- 36 If the properties 1 and 2 Dean Farm Cottages are retained in residential occupation, the M27 J10 shall not be opened as an all moves junction until a scheme for sound attenuation in respect of the dwellings and their amenity space has been submitted to and approved in writing by the Local Planning Authority. The scheme shall assess the impact of noise from vehicles using the new all moves M27 junction 10 and shall identify the measures necessary to attenuate against noise nuisance to occupants, with a view to achieving the recommendations outlined in BS8233, taking into account both indoor and outdoor living areas and bedrooms. Attenuation of the buildings shall be undertaken in accordance with the approved details before the M27 J10 is opened as an all moves junction.

REASON: In the interests of residential amenity

- 37 No residential or commercial development shall take place within a Neighbourhood (or part thereof) until an Energy Strategy for that Neighbourhood (or part thereof) has been submitted to and approved in writing by the Local Planning Authority. The strategy will include details such as (but not limited to) energy efficiency through design and layout, the use of low or zero carbon technologies and innovative building methods. The development shall be undertaken in accordance with the approved details.

REASON: To ensure an appropriate and sustainable form of development

- 38 No residential or commercial development shall take place within a

Neighbourhood (or part thereof) until details of water efficiency measures for that Neighbourhood (or part thereof) have been submitted to and approved in writing by the Local Planning Authority. These water efficiency measures should be designed to ensure potable water consumption does not exceed an average of 105l per person per day. The development shall be carried out in accordance with the approved details.

REASON: To ensure an appropriate and sustainable form of development and meet the requirements of Welborne Plan Policy WEL37

- 39 Prior to the approval of a reserved matter application for residential development in a neighbourhood (or part thereof) a Housing Statement for that neighbourhood (or part thereof) shall be submitted to and approved in writing by the Local Planning Authority. This Housing Statement will detail how the proposed development complies with the relevant site-wide housing strategy in relation to the layout, type, tenure, property size and timetable for delivery of:

- Market housing,
- Affordable housing,
- Lifetime homes,
- Specialist accommodation for the elderly (including extra care where relevant)
- Wheelchair adapted homes,
- Custom build plots and
- Passivhaus standard dwellings.

The development of the neighbourhood (or part thereof) shall be carried out in accordance with the approved details.

REASON: In the interest of providing a mixed, sustainable and diverse new community

- 40 Within 6 months of commencement of residential development within a neighbourhood which features a play space as identified in the relevant approved design code, the reserved matters application for these play spaces will be submitted for approval to the Local Planning Authority. The reserved matters applications will include details of hard and soft landscape, means of enclosure (where considered necessary), planting, pedestrian access, play equipment, street furniture (such as benches, signs and bins) drainage, site levels, long term management & maintenance, timetable for delivery and an implementation plan. The works shall be carried out in accordance with the approved details and the play area shall be open for use in accordance with the implementation plan, unless otherwise agreed in writing by the Local Planning Authority.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

41 No residential or commercial development shall take place within 15m from centre line of the 132kV overhead line and 10m from centre line of the 33kV overhead lines until one of the following has occurred:

- a) in the event the overhead line is to be undergrounded, prior to the undergrounding taking place a scheme and timetable for such undergrounding and for removal of the pylons shall be submitted to and approved in writing by the Local Planning Authority. The undergrounding and removal works shall be carried out in accordance with the approved details; or**
- b) in the event the overhead line is to be retained, a drawing showing how the retention of the overhead line (in whole or part) will be accommodated shall be submitted to and approved in writing by the Local Planning Authority. These details must demonstrate any land use impacts and how the High-Level Development Principles identified in the Structuring Plan, and any other principles outlined in any relevant design code document, can be accommodated with the line in situ. The development will subsequently be carried out in accordance with the approved details.**

REASON: In the interest of the visual amenities of the area.

AREAS OUTSIDE NEIGHBOURHOODS

42 All areas of public open space (excluding sports pitches), as identified in the Open Space and Green Infrastructure Parameter Plan - 60469153-006-A4, will be managed and maintained using a maximum of 5kg of Nitrogen per hectare per year.

REASON: In the interest of protecting the sensitive Solent coastal habitat.

43 Unless otherwise agreed in writing with the local planning authority, no development of Welborne Mile SANG (or part thereof), or Fareham Common SANG (or part thereof) shall take place until details of ecological management, details of biodiversity enhancement (in conformance with the Biodiversity Enhancement Strategy), arboricultural management, planting, construction management, archaeological details, contamination, site levels, boundary treatments, hardstanding (including areas for car parking), programme for delivery and any materials to be utilised in the development have been submitted to and approved in writing by the Local Planning Authority for the SANG, or part thereof. The SANGs will be delivered and opened for public access in accordance with the approved details, following a pre-opening site visit and inspection of each component part of the SANG by Officers of the Local Planning Authority.

REASON: In the interest of creating an acceptable layout for the SANG.

- 434 No residential unit within the development shall be occupied until the area identified as Dashwood (lined in blue on Application Boundary Plan Application Boundary Parameter Plan - 60469153-001-A0) has been laid out and made accessible to the public as SANG.**

REASON: In the interest of protecting the sensitive Solent coastal habitat

- 45 No residential unit within the development shall be occupied until a reserved matters application for parking for Dashwood has been submitted to and approved in writing by the Local Planning Authority, and has been laid-out in accordance with the approved details and is open to use. This application will include details of materials, landscaping, drainage, access and how this parking links to the proposed SANG at Dashwood.**

REASON: In the interest of protecting the sensitive Solent coastal habitat

- 46 Unless otherwise agreed in writing with the local planning authority, prior to the occupation of the 3601st residential unit within the development, the area identified as Welborne Mile shall be laid out and made accessible to the public as SANG. This includes any requisite parking area.**

REASON: In the interest of protecting the sensitive Solent coastal habitat

- 47 Unless otherwise agreed in writing with the local planning authority, prior to the occupation of the 5101st residential unit within the development, the area identified as Fareham Common shall be laid out and made accessible to the public as SANG. This includes any requisite parking area.**

REASON: In the interest of protecting the sensitive Solent coastal habitat

- 48 The Temporary SANG proposed will be delivered in accordance with the submitted Temporary SANG Strategy, unless otherwise first agreed in writing with the Local Planning Authority. As detailed in Paragraph 1.7 of the Temporary SANG Strategy:**

- Prior to the 750th residential occupation, Temporary SANG Phase 1 will be laid out and made accessible to the public;**
- Prior to the 2700th residential occupation Temporary SANG Phase 2 will be laid out and made accessible to the public;**
- Prior to the occupation of the 3601st residential unit, Temporary SANG Phase 3 will be laid out and made accessible to the public.**

Details of the layout, timetable for delivery, management arrangements and timetable for the temporary SANG function to cease for each Phase of Temporary SANG will be submitted to and agreed with the Local Planning Authority prior to the relevant occupation restriction. The development shall be undertaken in accordance with the approved details.

REASON: In the interest of protecting the sensitive Solent coastal habitat and mitigating the impact of the development on the ancient woodland floor of Dashwood.

- 49** No residential unit within the development shall be occupied until a planting scheme has been implemented for the area identified as advanced mitigation planting between Dashwood and Blakes Copse, unless otherwise agreed in writing with the local planning authority. This scheme shall be implemented in accordance with a detailed planting and landscaping plan, submitted to and approved in writing by the Local Planning Authority prior to commencement of the planting scheme. The detailed landscaping plans shall include any changes to ground levels, the species, planting sizes, planting distances, density and numbers of any new planting, an implementation plan and details for the ongoing long term management and maintenance of the planting. The landscaping will be provided and maintained in accordance with the approved details and implementation plan. Any plants or species that fail, die, are damaged or are removed within five years following their planting will be replaced in the next available planting season with a species of similar size and type.

REASON: To ensure early structural planting in the interest of an acceptable appearance for the development

- 50** Prior to the occupation of the 1,500th residential unit within the development, a reserved matters application for Welborne Park, detailing the hard and soft landscaping details, drainage, site levels, details of biodiversity enhancement (in conformance with the Biodiversity Enhancement Strategy), materials, footpath details, lighting, play equipment (if relevant), long term management plan, details of any temporary open space provision whilst the park is being laid out in full, implementation and phasing programme (to include the phased delivery of any temporary provision), details of interpretation materials regarding the Neolithic Long Barrow and a strategy to incorporate measures to ensure the long-term conservation of the Long Barrow, will be submitted to and approved in writing by the Local Planning Authority. Any temporary open space provision shall be provided and open for public use in accordance with the approved details and prior to the occupation of the 4,500th residential unit within the development, Welborne Park shall be laid out in full in accordance with the approved details and made available for use by the public thereafter unless otherwise first agreed in writing by the Local Planning Authority.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 51** No development shall take place on the site of the Neolithic Long Barrow as identified on the Green Infrastructure Parameter Plan (Drawing

Reference 60469153-006-A.4). Any reserved matters application for an area directly adjacent to the Neolithic Long Barrow will include a Management Plan which shall set out long term management responsibilities and long-term site condition monitoring and conservation of the monument. The development shall be carried out in accordance with the approved management plan unless otherwise first agreed in writing with the Local Planning Authority.

REASON: In the interest of preserving an important heritage asset on the site

- 52 Unless otherwise agreed in writing with the local planning authority, No development shall take place in the area identified as Dashwood Park on the approved Neighbourhoods Plan until a reserved matters application for the area has first be submitted and approved in writing by the Local Planning Authority. This reserved matters shall include details of provision of at least 2 tennis courts, hard and soft landscaping details, drainage, site levels, details of biodiversity enhancement (in conformance with the Biodiversity Enhancement Strategy), phasing and programme for implementation, footpath details, lighting, means of enclosure, and materials for Dashwood Park. The details shall also include details of the long term management of the park. The works shall be undertaken in accordance with the approved details.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 53 Unless otherwise agreed in writing with the local planning authority, No development shall take place in the area identified as Allotments on the approved Neighbourhoods Plan, until a reserved matters application has first been submitted and approved in writing be the Local Planning Authority. This reserved matters application shall include details of delivery timetable (including when the allotments will be available for use by the public), hard and soft landscaping, surface water drainage, site levels, parking, servicing, any communal buildings or individual plot buildings and access. The works shall be undertaken in accordance with the approved details.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 54 Unless otherwise agreed in writing with the local planning authority, No development shall take place in the area identified as Welborne Sports Hub on the approved Neighbourhoods Plan, until a reserved matters application has first been submitted and approved by the Local Planning Authority. This reserved matters application shall include details of any buildings, hard and soft landscaping, drainage, site levels, access, lighting, details of provision of an artificial grass pitch of a maximum

0.85ha, parking proposed as part of the Sports Hub and a timetable for delivery. The works shall be undertaken in accordance with the approved details, unless otherwise agreed in writing by the Local Planning Authority.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 55 Unless otherwise agreed in writing with the local planning authority, No development shall take place in the area identified as Cricket Pitch and Pavilion on the approved Neighbourhoods Plan, until a reserved matters application will be submitted and approved in writing by the Local Planning Authority. This reserved matters application will include hard and soft landscaping, access details, lighting, surface water drainage, site levels, parking, buildings and a timeline for delivery. The works shall be undertaken in accordance with the approved details.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development

- 56 No development shall take place within 15m of the high pressure and intermediate pressure gas main on site until the proposed layouts, levels protection or diversion has been submitted to and approved in writing by the local planning authority. The works shall be carried out in accordance with the approved details, unless otherwise first agreed in writing by the Local Planning Authority.

REASON: To ensure the development is undertaken without risk to existing utility infrastructure and in the interest of the safety of the area.

- 57 No development shall take place other than that related to the delivery of Junction 10 until details of the sources of all the funding necessary to carry out the Junction 10 works has been submitted to and approved in writing by the Local Planning Authority. The development shall be undertaken in accordance with the approved details.

REASON: To ensure the timely delivery of the necessary infrastructure to service the development and in the interest of highway safety.

- 58 There shall be no occupations above the thresholds set out at (a) and (b) below, unless otherwise first agreed in writing with the Local Planning Authority, until the M27 Junction 10 is open to the public as an all-moves junction, in accordance with the details approved under conditions 62 - 73 of this planning permission and as referred to within the legal agreement pursuant to section 106 of the Town and Country Planning Act 1990, as amended:

(a) 1,160 residential units; or

(b) 1,160 residential units and up to 1,500 sqm B1 Office floorspace; 5,750 sqm B2 General Industrial floorspace; 4,000 sqm B8 Storage or Distribution floorspace; 4,700 sqm A1 Retail Floorspace; and the opening of more than one primary school.

Where any changes are sought to these thresholds, the applicant will need to demonstrate that there will be no materially greater impact resulting from the changes than that currently identified in the Environmental Statement.

REASON: To ensure the timely delivery of the necessary infrastructure to service the development and in the interest of highway safety.

- 59 Notwithstanding the provisions of the Town and Country Planning (General Permitted Development) Order 2015 (As Amended) (or any Order revoking and re-enacting that Order) with or without modification, no new vehicular/cyclist/pedestrian access to the application site, other than those shown on the approved plans or construction access (agreed through CEMP submission) shall be formed to the site, unless otherwise agreed in writing by the local planning authority.

REASON: In the interest of highway safety.

- 60 No occupation of any development, other than the proposed SANG car park, with access from Knowle Road shall take place until a scheme to reduce the travelling speed along Knowle Road has first been submitted to and approved in writing by the Local Planning Authority. This scheme shall include details of the methods to be undertaken, as well as the timetabling and phasing required to deliver these methods. The development shall be undertaken in accordance with the approved details.

REASON: to ensure the treatment of Knowle Road is suitable to serve the development

- 61 No development shall take place on the land coloured brown and identified as "S-Sawmills" on the supporting plan titled "NEIGHBOURHOODS", prepared by AECOM (reference: project number 60469153, revision A.0) until a Confirmatory Deed has been entered into with the Owner, The Borough Council and the County Council substantially in accordance with the draft appended to the legal agreement entered into pursuant to Section 106 of the Town and Country Planning Act 1990 in connection with this planning permission dated [] and between []

REASON: to ensure development on the land is subject to a planning obligation so as to be acceptable in planning terms and to make a proportional contribution to the infrastructure needed across the wider site

WORKS RELATED TO M27 JUNCTION 10

- 62** Central Roundabout shall not be first used until details of the measures to be taken to physically and permanently close Pook Lane from the A32 have been submitted to and approved in writing by the Local Planning Authority. This includes a timetable for the delivery of these measures. The development is to be undertaken in accordance with the approved details.

REASON: In the interest of Highway Safety.

- 63** No development shall take place within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 or any other area subject to development associated with the provision of the M27 J10 improvements until a detailed Construction Environmental Management Plan (CEMP) has been submitted to and approved in writing by the Local Planning Authority for part thereof. Where relevant, this CEMP will include details regarding:

- a) Soil movement, methods of tracking soil movement and details for demonstrating soil will be suitable for use;
- b) Construction Traffic Management (to include the co-ordination of deliveries and plant and materials and the disposing of waste resulting from demolition and/or construction so as to avoid undue interference with the operation of the public highway, particularly during the Monday-Friday AM Peak (0800-0900) and PM Peak (1630-1800) periods);
- c) Site Office location;
- d) Contractor parking areas for use during construction;
- e) Areas for loading and unloading;
- f) Construction lighting details;
- g) Construction access details;
- h) The storage of materials and construction waste, including waste recycling where possible;
- i) The storage and dispensing of fuels, chemicals, oils and any hazardous materials (including any hazardous soils);
- j) The proposed method of working (this shall include details to monitor and prevent adverse impacts to surface water, groundwater and adverse impacts caused by noise, vibration, odours);
- k) The proposed maintenance and aftercare of the site;
- l) The provision of road and wheel cleaning facilities, including any required drainage;
- m) traffic management measures to address the potential conflict between users of the footpath network and the construction vehicles; Dust and dirt control measures; and
- n) Measures to avoid impact upon the high pressure gas main where works proposed are within 15m of the main;
- o) measures to avoid impacts on the non-statutory designated sites, retained habitats and trees; and

- p) measures to minimise impacts on any existing occupied residential properties.

The works shall subsequently proceed in accordance with the approved details unless otherwise agreed in writing with the Local Planning Authority.

REASON: In the interest of managing the construction process so as to avoid impact on the highway network and gas main and to ecological and arboricultural receptors and in the interest of the amenities of the area.

- 64 The improved Junction 10 of the M27 shall not be open to public traffic until, the noise attenuation barriers have been constructed in accordance with drawings CJ008926-ATK-HFE-J10-DR-CH-001101_C02 - Proposed Fencing Plan (Sheet 01 of 03), CJ008926-ATK-HFE-J10-DR-CH-001102_C03 - Proposed Fencing Plan (Sheet 02 of 03) and CJ008926-ATK-HFE-J10-DR-CH-001103_C03 Proposed Fencing Plan (Sheet 03 of 03) unless otherwise agreed in writing by the Local Planning Authority. Any alterations to the noise attenuation barriers must demonstrate that no additional material impacts shall occur than that currently assessed in ES Chapter 14A Noise and Vibration would be created from any changes proposed. The development shall be carried out in accordance with the approved details.

REASON: In the interest of the amenity of the occupants of Welborne.

- 65 Prior to the closure of Kneller Court Lane the access approved under planning permission P/20/0007/FP (or any other subsequent planning permission granted for the same purpose) to provide access to 70, 72 Kiln Road, and 1&2 Dean Farm Cottages will be provided and made available for use. In the event that all of these properties are no longer occupied and evidence has been submitted to and approved in writing by the local planning authority to that effect, the delivery of the alternative access will not be required. Any development undertaken will be in accordance with the approved details.

REASON: To ensure existing properties on the site can be accessed

- 66 No development requiring permanent foundations shall take place within the area as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 and any other area subject to development associated with the provision of the M27 J10 improvements, until the following items have been submitted to and approved in writing by the Local Planning Authority for this whole area or part thereof:
- A report of Intrusive Site Investigations and an assessment of the risks posed to human health and the wider environment including water resources. This shall comprise a desk study, conceptual site model and preliminary risk assessment

- Where required, a strategy of Remedial Measures to address the identified risks;
- Materials Management Plan for reuse of soil/ materials

The agreed scheme of Remedial Measures and Materials Management Plan shall be implemented as agreed and verified in writing by an independent competent person, and the written confirmation shall be provided to the Local Planning Authority prior to the opening of the improved M27 J10.

REASON: To ensure a safe living and working environment

- 67 Development within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 and any other area subject to development associated with the provision of the M27 J10 improvements shall be monitored during construction for evidence of previously unidentified contamination. If suspected contamination is encountered, then all work must stop and no further work shall be carried out in the affected area(s) until investigation measures and remediation measures have been submitted to and approved in writing by the Local Planning Authority. The agreed scheme of Remedial Measures shall be implemented as agreed and verified in writing by an independent competent person, and the written confirmation shall be provided to the Local Planning Authority prior to the opening of the improved M27 J10.

REASON: To ensure a safe living and working environment.

- 68 Notwithstanding the details submitted within the enabling works planning application P/18/1192/FP, no development shall take place within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 any other area subject to development associated with the provision of the M27 J10 improvements, until an Ecological Management Plan, Arboricultural Impact Assessment and Method Statement have been submitted to and approved in writing by the Local Planning Authority for this whole area or part thereof. This statement should detail all necessary ecological mitigation, compensation and enhancement measures (to be informed as necessary by up-to-date survey and assessment where relevant, details of tree and hedgerow protection measures). The works shall subsequently proceed in accordance with the approved details.

REASON: In order to retain established landscaping on the site in the interest of the visual amenities of the area

- 69 Any tree and hedgerow protective measures installed within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03, and any other area subject to development associated with the provision of the M27 J10 improvements shall be installed on site prior to any development taking place (including site clearance and ground preparation, unless minor clearance is required for

the installation of said tree or hedgerow protective measures and such clearance is first agreed with the Local Planning Authority). Protective fencing shall be maintained and retained for the full duration of the works or until such time as may be agreed in writing by the Local Planning Authority. No activities, nor material storage, nor placement of site huts or other equipment what-so-ever shall take place within the fencing without the prior written approval of the Local Planning Authority.

REASON: In order to retain established landscaping on the site in the interest of the visual amenities of the area.

- 70 All service routes, drain runs, soakaways or excavations in connection with the development of the area within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03, and any other area subject to development associated with the provision of the M27 J10 improvements shall remain wholly outside the tree and hedgerow protective area without the prior written agreement of the Local Planning Authority.

REASON: In order to retain established landscaping on the site in the interest of the visual amenities of the area.

- 71 Notwithstanding the details submitted within drawings listed in this permission, no development shall take place within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 and any other area subject to development associated with the provision of the M27 J10 improvements until a surface water drainage scheme, based on sustainable drainage principles and an assessment of the hydrological and hydrogeological context of the area of development concerned have first been submitted to and approved in writing by the Local Planning Authority for this whole area or part thereof. Information required shall include, where relevant:

- The critical design storm period for each attenuation feature
- Drainage areas and assumptions on permeability
- Allowances for any future upstream development areas that contribute flows to this zone
- The methods employed to control the surface water discharge and volume
- Infiltration testing in pits (not boreholes) to support the assumed infiltration rates
- The factor of safety assumed for each infiltration feature
- The run-off rate calculations for discharge to surface waters
- Treatment measures employed to achieve the relevant water quality treatment
- Long term management and maintenance of the drainage features
- Where the drainage scheme for any area relies on drainage features outside of the area of development concerned these must be completed sufficiently to perform the necessary attenuation and

treatment function. No area of built development shall be allowed to discharge run-off unattenuated and untreated into receiving watercourses.

The development shall be carried out in accordance with the approved details.

REASON: To provide the necessary infrastructure at appropriate stages of construction and to ensure a comprehensive, well serviced development.

- 72 No development shall take place within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 and any other area subject to development associated with the provision of the M27 J10 improvements, until a Written Scheme of Investigation and Programme of archaeological assessment has been submitted to and approved in writing by the Local Planning Authority for this whole area or part thereof. The works shall subsequently proceed in accordance with the approved details.**

REASON: The site is potentially of archaeological significance and any finds and sites located within the development site will need to be recorded and kept under review.

- 73 Notwithstanding the details approved under drawings this planning permission, No development shall take place within the area identified as the extent of M27 J10 works in drawing WEL-PBF-J10-XX-DR-CH-00001-D2-P03 and any other area subject to development associated with the provision of the M27 J10 improvements until a lighting strategy and details have been submitted to and approved in writing by the Local Planning Authority for this whole area or part thereof. This lighting strategy will include the location and specification of the lighting proposed, including details on how the proposed lighting may affect protected species. The works shall subsequently proceed in accordance with the approved details, unless otherwise agreed in writing by the Local Planning Authority.**

REASON: In the interest of the amenity of the area and protected species.

APPENDICES:

- Appendix A) The Council's Appropriate Assessment
- Appendix B) CBRE report for October 2019 Committee
- Appendix C) CBRE Addendum – used as the update for the Oct 19, committee
- Appendix D) CBRE Planning Viability Review Addendum Report – January 2021
- Appendix E) CBRE Planning Viability Review Addendum Report – July 2021

APPENDIX A

Appropriate Assessment by Fareham Borough Council pursuant to the Habitats Regulations 2017

The Habitats Regulation Assessment Process

Special Areas of Conservation (SACs) and Special Protection Areas (SPAs) are European designations (formerly known as Natura 2000 sites and which have now been replaced by the 'national site network' under the Conservation of Habitats and Species (Amendment) (EU Exit) Regulations 2019) and are notified in the UK through the Conservation of Habitats and Species Regulations 2017 (The Habitats Regulations) which is the UK implementation of the European Habitats Directive.

Ramsar sites are not European sites subject to the Habitats Directive, the Wild Birds Directive or the Habitats Regulations, they are designated as wetlands of international importance. Government policy statements have however been issued which extend the same protection afforded to SPAs and SACs to Ramsar sites. A similar assessment of the Ramsar sites has therefore been undertaken in light of the requirements of the Ramsar Convention, the NPPF and policy DSP13.

Under the Habitats Regulations, before deciding whether to grant planning permission for the scheme, which is likely to have significant effect on a designated site and is not directly connected with or necessary to the management of that site, the LPA must make an appropriate assessment of the implications of the scheme for that site in view of that site's conservation objectives. A similar approach applies as a matter of policy to potential SPAs, SPA or and Ramsar sites. In light of the conclusions of the appropriate assessment, the LPA may grant planning permission only after having ascertained that it will not adversely affect the integrity of the designated site.

The EU Commission "Assessment of plans and projects significantly affecting Natura 2000 sites Methodological Guidance" 2001 recommends a staged approach to the assessment process when undertaking assessment of plans or projects that may impact upon designated European sites, which is set out below. Further interpretative guidance is provided by the EU Commission 's notice "Managing Natura 2000 Sites" 2018.

Screening (Stage 1):

The process of identifying potentially relevant European sites and the likely impacts of a project upon the designated features of a European site, either alone or in combination with other plans and projects and considering whether the impacts are likely to be significant.

Appropriate Assessment (Stage 2):

Assessment of the impacts, taking into account proposed mitigation measures, on the integrity of the European site, either alone or in combination with other plans and projects, about the site's structure and function and its conservation objectives.

The Habitat Regulations require Fareham Borough Council as the Competent Authority to carry out the Appropriate Assessment. To aid the Council in carrying out the Appropriate Assessment, the applicant provided a Report (AECOM, February 2017) to Inform the Appropriate Assessment. This was superseded by a Shadow Appropriate Assessment (Holbury Consultancy Service Ltd, November 2020).

Natural England and the Council's Ecologist have reviewed both reports and have confirmed that they concur with the conclusions reached and that the Shadow Appropriate Assessment can be incorporated by the Council into this document as their Appropriate Assessment subject to the terms of this document.

Summary of Screening (Stage 1):

The Report to Inform the Appropriate Assessment concluded that there would be no likely significant effect on the following Natura 2000 sites (which have now been replaced by the 'national site network' under the Conservation of Habitats and Species (Amendment) (EU Exit) Regulations 2019)) without the need for further analysis:

Butser Hill SAC
River Itchen SAC
Solent & Isle of Wight Lagoons SAC
Chichester & Langstone Harbour SPA/Ramsar site

A more detailed summary of which national site network sites were screened in/out is provided in section 5 of the Report to Inform the Appropriate Assessment.

The Shadow Appropriate Assessment identified that the proposed development could have a likely significant effect (alone or in combination with other plans or projects) on the following 'national site network' sites:

Solent and Southampton Water SPA
Portsmouth Harbour SPA
Solent and Dorset Coast SPA
Solent Maritime SAC
Solent and Southampton Water Ramsar
Portsmouth Harbour Ramsar

The impact of the proposed development on these sites need to be taken through to Stage 2, the Appropriate Assessment, which will consider the potential impact in more detail.

The proposed development is not connected with fulfilling the management objectives of any of the "national site network" (formerly Natura 2000 sites).

Summary of Appropriate Assessment (Stage 2)

As described previously the applicant submitted, as part of the application documents, a shadow appropriate assessment to inform the Council 's Habitats Regulations Assessment. The Local Planning Authority (as the Competent Authority)

has considered the applicant's report together with all the species and habitats listed as interest features of the designated sites. Expert advice received from Natural England (including recommended mitigation measures) and the Council's own Ecologist has been reviewed. Representations received as a result of publicising the application have also been taken into consideration.

The Local Planning Authority must be satisfied to a high degree before it can conclude that there will be no adverse effect on the integrity of the European Site: it must be sure beyond reasonable scientific doubt that there will be no such adverse effect and, when considering any mitigation or other measures, these must be certain in their effect.

In the light of the information provided, and the assessment undertaken, the Local Planning Authority is satisfied beyond reasonable scientific doubt that, provided the mitigation measures contained within both the applicant's Shadow Appropriate Assessment and the recommendations contained within Natural England's advice are strictly adhered to, the potential impacts of the proposed development both alone and in combination with other proposals would be negligible. It is therefore considered to the requisite high standard that the proposed development would not have an adverse effect on the integrity of the sites.

Conclusion

It is recommended that the Local Planning Authority incorporates in and as part of its Appropriate Assessment the applicant's Shadow Appropriate Assessment together with the recommended conditions contained within Natural England's consultation responses to the Welborne planning application dated 1st February 2019, 19th September 2019, 7th October 2019 and 19th January 2021 as the Borough Council's Assessment under the Habitat Regulations subject to the matters appearing above.

Associated documents

Shadow Appropriate Assessment UPDATE November 2020 (Holbury Consultancy Service Ltd)

Report to Inform a Habitat Regulations Assessment February 2017 (Aecom)

Natural England's consultation response dated 1st February 2019, 19th September 2019, 7th October 2019 and 19th January 2021

Fareham Borough Council's Ecology consultation response dated 18th January 2019 and 12th January 2021.



W E L B O R N E
G A R D E N V I L L A G E

Shadow Appropriate Assessment - update
Holbury Consultancy Service
November 2020



Welborne
Shadow Appropriate Assessment
UPDATE

For Buckland Development Ltd

November 2020

UPDATE OF SHADOW APPROPRIATE ASSESSMENT SUBMITTED IN October 2019

This Shadow Appropriate Assessment provides an update to the Assessment dated October 2019 and submitted to Fareham Borough Council in October 2019. The revisions include the following:

- Section 1. Additional text to address the implications of Brexit for Habitats Regulations Assessment, with the end of the Transition Period on 31st December 2020.
- Sections 1, 4, 5, 6 & 7. Reference to the Solent & Dorset Coasts Special Protection Area, classified in January 2020
- Sections 3 & 6. Reference to consented access Laly's access track.
- Section 5. Revisions to tables 2 & 3 to reflect additional air quality calculations undertaken following changes to relevant guidance and industry best practice.
- Section 6. Revised nitrogen balance calculations to reflect the most recent Natural England guidance (June 2020) and calculator.

Welborne Shadow Appropriate Assessment Update

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Welborne Shadow Appropriate Assessment Update

1.0 Introduction

- 1.1 In March 2017, Buckland Development Ltd (Buckland), submitted an outline planning application to Fareham Borough Council (FBC) for up to 6,000 residential dwellings, employment uses, local and community services and supporting infrastructure with all matters reserved, except for works to Junction 10 of the M27 motorway, the three highway junctions and related works to the A32 ('the Development') on land north of Fareham, known as Welborne ('the Site').
- 1.2 The site lies within close proximity to four statutory designated sites of European nature conservation importance (see Appendix 1).
 - Solent and Southampton Water Special Protection Area (SSW SPA),
 - Portsmouth Harbour Special Protection Area (PH SPA)
 - Solent Maritime Special Area of Conservation (SM SAC)
 - Solent and Dorset Coast Special Protection Area (S&DC SPA)
- 1.3 The site also lies within close proximity to the Solent and Southampton Water Ramsar and the Portsmouth Harbour Ramsar sites (see Appendix 1).
- 1.4 The SSW SPA, PH SPA, S&DC SPA and SM SAC receive statutory protection under the Conservation of Habitats and Species Regulations 2017 (the 'Habitats Regulations'), which transpose the requirements of the European Council Directives on the Conservation of Natural Habitats and of Wild Fauna and Flora (42/43/EEC) and the Conservation of Wild Birds (2009/147/EC) into domestic legislation. The Habitats Regulations afford a high level of protection to sites classified as SPAs as areas that hold significant populations of certain bird species (SPAs). They also afford the same level of high protection to tracts of land supporting habitats or rare species (other than birds) considered scarce or vulnerable at a European community level (SACs).
- 1.5 After the end of the Brexit transition period on 31 December 2020 the Conservation of Habitats and Species Regulations 2017 will remain in place, with only minor amendments coming into force on the 31 December 2020 through the Conservation of Habitats and Species Amendment (EU Exit) Regulations 2019. The UK will no longer be bound by the requirements of the Habitats and Birds Directive after this date but the effective protection afforded to the sites identified in para 1.2 will remain unchanged, with the HRA regime as set out in the current Habitats Regulations continuing to apply in broad terms following the end of the transition period. The content, structure, process and conclusion of this Appropriate Assessment will therefore remain unchanged.
- 1.6 At the time of writing it is understood that all courts in the UK, with the exception of the Supreme Court, will continue to be bound by EU judgements handed down by the Court of Justice prior to 31 December 2020.

- 1.7 Natural England guidance referred to within the context of the Appropriate Assessment will apply equally to the new regime post Brexit.
- 1.8 Ramsar sites are designated as wetlands of international importance and are afforded similar legislative protection to the European Natura 2000 network. Government has issued policy statements relating to the special status of Ramsar sites. This extends the same protection afforded to SPA's and SAC's to Ramsar sites in the UK.
- 1.9 Under the Habitats Regulations, FBC is a competent authority, responsible for ensuring that development control decisions do not adversely affect the integrity of Natura 2000 sites.
- 1.10 This document provides information for the Habitats Regulations Assessment that FBC will need to undertake in determining the outline planning application for Welborne, and has been prepared to support an appropriate assessment of likely significant effects of the proposals on the SSW SPA, PH SPA, S&DC SPA, SM SAC and respective Ramsar sites. It updates and replaces the document submitted to FBC in October 2019.

2.0 Legislative and policy framework

Statutory framework

Tests of the Habitats Regulations

2.1 SACs and SPAs form part of a network of nature protection areas across the European Union known as Natura 2000 sites, and are protected in the determination of a planning application. Under Regulation 61 of the Habitats Regulations, the competent authority is responsible for assessing whether land use plans or proposed developments could adversely affect a Natura 2000 site. This requires a process known as a Habitat Regulations Assessment (HRA) encompassing two tests under Regulation 63(1) of the Habitats Regulations.

- **Test 1:** having ascertained that the plan is not directly connected to, or necessary for site management for nature conservation, the first test of the HRA, commonly referred to as a screening test, considers whether or not a plan or project is likely to have a significant effect on a European site either alone or in combination with other plans or projects.

A significant effect is any effect that would undermine the conservation objectives for the respective European site and may include physical loss and/or damage of a habitat, disturbance effects, changes to water availability, deposition of contaminants through changes in air quality etc.

Following a recent European Court Judgement (ECJ) *People Over Wind and Sweetman v Coillte Teoranta (C-323/17)*, '*measures intended to avoid or reduce impacts on a European site cannot at the same time be regarded as part of the "project"*'¹ and must be excluded from assessing whether a project is likely to have a significant effect, either alone or in combination with other plans and projects.

- **Test 2:** the second test of the HRA is relevant to those plans or projects that are screened as likely to have a significant effect alone or in combination with other plans or projects, and requires an appropriate assessment. The role of the appropriate assessment is to consider the implications of the plan or project for the conservation objectives of the European sites in question, and determine whether they will have an adverse effect on the integrity of the site. In carrying out an appropriate assessment, a local authority must have regard to the manner in which the project is proposed to be carried out, or to any conditions or restrictions subject to which it proposes that the consent, permission or other authorisation should be given.

¹ <https://insideecology.com/2018/05/01/habitat-regulations-assessments-no-more-screening-out-with-mitigation-measures/>

Conservation objectives

- 2.2 Conservation objectives are identified for all European sites and cover all features that qualify the site for classification or designation. The conservation objectives apply under the Habitats Regulations, Habitats Directive and Wild Birds Directive, and must be considered during a Habitats Regulation Assessment, including an Appropriate Assessment.
- 2.3 For Ramsar sites, a decision has been made by Defra and Natural England not to produce Conservation Advice packages, focusing instead on the production of High Level Conservation Objectives because it's considered that conservation advice available for overlapping European Marine Sites is sufficient to support the management of Ramsar interests². European Marine Sites (EMSs) are those areas below mean high water designated as Special Areas of Conservation (SACs) and Special Protection Areas (SPAs).
- 2.4 The Solent European Marine Sites (SEMS) is one of a number of European marine sites in the UK that are designated as internationally important sites for their habitats and species. SEMS covers the harbours, estuaries, areas of open coast and inshore water around the Solent and includes the SSW SPA, PH SPA and the SM SAC. As a matter of policy, the provisions of the Habitats Regulations relating to Habitat Regulations Assessments (HRAs) extend to Ramsar sites. For the purposes of this assessment, the conservation objectives of the SSW SPA, SM SAC and PH SPA are considered to address all relevant interest features in the corresponding Ramsar sites.

Policy framework

- 2.5 An established policy framework is in place to support the assessment of the Welborne proposals under the Habitats Regulations.

Welborne Plan

- 2.6 The adopted Welborne Plan³ forms part 3 of the Fareham Borough Local Plan and states that any potentially adverse effects arising from the development of Welborne on Natura 2000 sites identified through the HRA must be either avoided or fully mitigated. Where adequate mitigation or avoidance measures cannot be achieved on or adjoining the site through the provision of suitable areas of natural greenspace, FBC will require a financial contribution to provide off-site mitigation measures to ensure that the tests of the HRA are met.
- 2.7 The Welborne Plan identifies the importance of Suitable Alternative Natural Greenspace (SANG) in mitigating recreational impacts on the coast but it is also clear that there are no recognised standards for SANG relevant to the

² <https://www.gov.uk/government/publications/conservation-advice-for-marine-protected-areas-project-background/marine-conservation-advice-project-summary>

³ <https://www.fareham.gov.uk/PDF/planning/LP3WelborneAdopted.pdf>

mitigation of recreational impacts on coastal ecological interests. On advice from Natural England, the Welborne Plan identifies a standard of at least 70% of the established SANG standard for the Thames Basin Heaths European sites. On this basis, the Welborne Plan identifies the need for around 84.8ha of additional natural green space on land on or adjoining Welborne. The balance of the mitigation requirement will be met through a financial contribution towards the measures in the Solent Recreation Mitigation Strategy (SRMS)⁴ (now Bird Aware) to mitigate potential impacts along the coast.

- 2.8 Policy WEL30 sets out the formal policy requirements for the avoidance and mitigation of impact on Internationally protected sites and allows for flexibility in the final package, so long as it is fully agreed with Natural England.

Bird Aware

- 2.9 The Welborne Plan identifies the ability to make financial contributions to the Solent Recreation Mitigation Partnership (SRMP) as a means of mitigating impacts of Welborne on Internationally protected sites. The SRMP comprises the fifteen Solent local authorities of which FBC is one. Natural England, RSPB, Hampshire & Isle of Wight Wildlife Trust, and Chichester Harbour Conservancy have also ratified the strategy.
- 2.10 The SRMP was established to formulate, implement and monitor a strategic solution to in combination impacts on the Solent SPA's from increased recreational pressures deriving from the 60,000 new homes planned around the Solent up to 2034. The solution is set out in the SRMS - part of Bird Aware - an initiative deriving from the Partnership, and uses developer contributions to fund a range of mitigation measures that reduce the in combination impact of greater numbers of people visiting the coast for recreation.
- 2.11 FBC collects financial contributions from all new residential development in the Borough in line with the SRMS and pools them with those received by other local authorities to implement the mitigation measures identified in the SRMS. The contributions received by the authorities are transferred quarterly to the Partnership and are spent against the measures set out in the SRMS to address the in combination impacts on the Solent SPA's.

⁴ Solent Recreation Mitigation Partnership, December 2017. Solent Recreation Mitigation Strategy. Available from <http://www.birdaware.org/>

3.0 Development proposals and site description

3.1 The outline planning application (OPA) lodged with Fareham Borough Council (FBC) ref: P/17/0266/OA is for up to 6000 residential units and associated infrastructure at Welborne Garden Village. The proposals include the delivery on a substantial area of Suitable Alternative Natural Greenspace (SANG). The proposed development comprises:

- A new community of up to 6000 homes
- A district centre and smaller village centre, with shops and community facilities
- Commercial, industrial, warehousing and employment space
- Health centre
- Vets
- A secondary school, 3 primary schools and children's nurseries
- A care home
- A hotel
- Parks, green open spaces and sports pitches
- Retention of some existing hedgerows, grassland, woodland areas, allotments and wildlife corridors
- Household waste recycling centre
- Infrastructure including supplies for electricity and water
- Sustainable drainage systems including ponds and water courses
- A remodelled M27 J10 to turn it into an all moves junction
- Works to the A32 including the creation of three highway junctions and new crossing(s)
- Connections to the surrounding cycleway and pedestrian network

Description of SANG proposals

3.2 A total of 70.4ha of SANG is provided at Welborne, consisting of Fareham Common, Dashwood and Welborne Mile. The SANG will be managed in perpetuity by the Land Trust or another suitable land management organisation. Funding arrangements are set out in full in the SANG Management Plan⁵ that should be read in conjunction with this document.

Dashwood

3.3 Dashwood extends to 38.1 ha and includes an area of grassland in the south eastern corner which will form part of the SANG. There are several areas within Dashwood that are classified as Ancient Woodland, including areas within the eastern and north western perimeters of the site. A free car park will be created to the south west of the wood, at Knowle Road at the rate of one parking space per hectare of SANG. The SANG Management Plan includes a masterplan showing the layout of Dashwood as part of the Welborne SANG package.

3.4 The Welborne development will link through to Dashwood via a network of

⁵ Holbury Consultancy Services, 2018. Welborne SANG Management Plan. On behalf of Buckland Development Ltd.

pedestrian routes. Three access points are located into the woodland at the following points:

- the south western corner along the existing Public Right of Way. This entrance connects footpaths from the Welborne Greenway perimeter trail and the Welborne Mile SANG into Dashwood.
 - the north western boundary (also on the existing Public Right of Way) and connects to Mayles Lane
 - the south eastern corner in a location that is already an obvious location for entry due to existing gaps in the understorey and opens onto a 1.5ha area of open unmanaged grassland, but which will be brought into active management as part of the detailed SANG Management Plan.
- 3.5 A 2.8 km circular walk, passable all year round, will be provided within Dashwood. This will sit alongside a network of existing secondary paths already evident. The existing Public Right of Way within the western edge of the wood will be maintained. Dog splashes will be provided outside of the woodland in an area of grassland to the south east of the main woodland block.
- 3.6 The SANG Management Plan sets out a series of management objectives that secure the conservation management of the woodland in perpetuity and balance the ecological interests of the site against the need to encourage public access. The site will be promoted as a nature reserve to ensure that it's inherent ecological value is evident to members of the public. Measures will be put in place to ensure the effective conservation management of the woodland, ensuring that it remains an attractive place to visit and use for informal recreation.
- 3.7 Dashwood lies within the administration of Winchester City Council (WCC). To ensure that FBC can properly rely on Dashwood as SANG, Buckland submitted an application for consent to construct a footpath and place infrastructure within the woodland, consistent with a future use as SANG. This application was granted planning permission for works to convert to SANG under 17/01607/FUL by WCC. Its role and function as SANG for Welborne will be secured by the S106. This will establish the formal relationship of Dashwood to the Welborne OPA and ensure that the two properly interface and support each other (see Appendix 2 for details).

Welborne Mile

- 3.8 The Welborne Mile is 17.1ha tract of land currently under arable production. This part of the overall SANG package offers a 2km green corridor of 90m average width. The southern half of the site is open, with a hedgerow and hedgerow trees lining the existing path that traverses the full length. The northern half of the site is more vegetated, with the extreme north-western boundary bounded by ancient woodland. The Welborne Mile will be accessible at multiple points along its length, directly from the development roads and private drives, linking to Dashwood to the north, and Fareham Common to the south and connecting into the existing Public Right of Way. Pedestrian access points will also be provided directly from the Welborne

development. Welborne Mile will be fenced to ensure that dogs can be safely allowed off lead and offers a circular walk of 3.5km within the Welborne Mile itself.

- 3.9 Since submission of the outline application in 2017, planning consent has been granted for an access track across the southern end of the Welborne Mile SANG.

Fareham Common

- 3.10 Fareham Common SANG extends to approximately 15.2ha and consists of horse pasture and arable land divided into linear sections by hedgerows, with mature hedgerow trees. The site boundaries are well vegetated with trees and hedgerows, and scrub located on the M27 motorway embankments. A free car park will be provided in Fareham Common off Funtley Hill, and will include half of the parking provision for the Welborne Mile SANG. Parking will be provided at a rate of one space per hectare of effective SANG. Links between Fareham Common and Welborne Mile will be possible under Funtley Bridge. Entrance to Fareham Common will also be possible from North Fareham, via a crossing of Kiln Road. It will be possible to complete a 2.3km circular walk within the SANG.

Noise pollution: discounting of SANG

- 3.11 The southern end of Welborne Mile and Fareham Common both lie within close proximity to the M27. Natural England advises that the acceptable limit for noise in SANGs is set at 60dB or below. Noise modelling (see appendix 3) shows that noise levels in all parts of Fareham Common will be above 60dB once allowance is made for the rearrangements to J10 and the Smart Motorway scheme. In addition, an area at the southern end of the Welborne Mile will also be at this level (5.5ha). Acoustic fencing will be located along the northern boundary of the M27 corridor to protect the southern part of Welborne mile and this is reflected in the modelling at Appendix 3. Acoustic barriers along the southern edge of the M27 would not be sufficient to reduce noise levels to <60dB due to the steeply sloping topography and are not therefore proposed.
- 3.12 In recognition of the impact of the motorway on the amenity value of the SANG, a discount of 50% has been agreed with Natural England. Therefore, the 15.2ha of Fareham Common SANG is agreed to offer an effective SANG area of 7.6ha. Likewise, the 17.2ha of Welborne Mile is agreed to offer an effective SANG area of 14.4ha, representing a partial discount (see Table 1). The total area of effective SANG is therefore 60.1ha.

Table 1 Discounting of SANG area to reflect 60dB noise contour

SANG	Area <60dB (ha)	Area >60dB (ha)	Total area (ha)
Dashwood	38.097	0	38.097
Welborne Mile	11.655	5.467	17.120
Fareham Common	0	15.200	15.200
Gross area	49.752	20.667	70.413

Effective area	49.752	10.3335	60.0855
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Phasing

- 3.13 The Welborne SANG will be delivered in three phases, comprising Dashwood, the Welborne Mile and Fareham Common respectively. Each will be delivered to provide a mitigation solution in proportion to the number of houses delivered, or earlier. Therefore the exact timings for the completion of the each phase of SANG will be determined by the rate of residential development, defined in relation to occupation triggers. The occupation triggers are as follows:
- Dashwood (38.1ha = 63.3% of the total) – prior to the first occupation.
 - The Welborne Mile (14.4ha = 23.9% of the total (allowing for noise discount)) – to be in place for the 3601th occupation, or earlier
 - Fareham Common (7.6ha = 12.6% of the total (allowing for noise discount)) – to be in place for the 5101th occupation, or earlier.
- 3.14 Note that the figures shown in relation to Welborne Mile and Fareham Common relate only to the areas of effective SANG, although the full extent of each SANG will be provided at the identified triggers.

4.0 Baseline

4.1 The following section sets out the location, designation criteria and conservation objectives of the European sites to be included in this HRA. The locations of these sites relative to the application site are shown in Figure 1.

Solent and Southampton Water SPA/Ramsar

4.2 The SSW SPA extends from Hurst Spit to Hill Head along the south coast of Hampshire, and from Yarmouth to Whitecliff Bay along the north coast of the Isle of Wight. The site comprises a series of estuaries and harbours with extensive mud-flats and saltmarshes together with adjacent coastal habitats including saline lagoons, shingle beaches, reedbeds, damp woodland and grazing marsh. The mud-flats support beds of *Enteromorpha* spp. and *Zostera* spp. and have a rich invertebrate fauna that forms a food resource for the estuarine birds. In summer, the site is of importance for breeding seabirds, including gulls and four species of terns. In winter, the SPA holds a large and diverse assemblage of waterbirds, including geese, ducks and waders. Dark-bellied brent geese *Branta bernicla bernicla* also feed in surrounding areas of agricultural land outside the SPA. The proposals lie within 4km of the SSW SPA.

Qualifying features

4.3 The SSW SPA qualifies under Article 4.1 of the Directive (79/409/EEC) as it is used regularly by 1% or more of the GB population of a species listed on Annex I in any season⁶:

- Mediterranean gull *Larus melanocephalus* – 2 pairs - representing 8.2 – 13.9% of the GB breeding population (5 year peak mean. Count years 1994-1998).
- Little tern *Sterna albifrons* – 49 pairs - representing 2% of the GB breeding population (5 year peak mean. Count years 1993-1997).
- Roseate tern *Sterna dougallii* – 2 pairs - representing 3.1% of the GB breeding population (5 year peak mean. Count years 1993-1997).
- Common tern *Sterna hirundo* – 267 pairs – representing 2.2% of the GB breeding population (5 year peak mean. Count years 1993-1997).
- Sandwich tern *Sterna sandvicensis* – 231 pairs – representing 1.7% of the GB breeding population (5 year peak mean. Count years 1993-1997).

4.4 The breeding bird assemblage of the SSW SPA is largely confined to saltmarsh habitats west of the Beaulieu River or nature reserves such as Titchfield Haven. The Mediterranean gull colony in Langstone Harbour is currently the largest colony in Hampshire and appears to be attracting most of the breeding birds from along the Solent coast. The breeding tern colonies are mostly associated with salt-marsh habitats or artificial lagoons and are

⁶ <https://designatedsites.naturalengland.org.uk/Marine/MarineSiteDetail.aspx?SiteCode=UK9011061>

largely inaccessible during the breeding season.

4.5 The site also qualifies under Article 4.2 of the Directive (79/409/EEC) because it is used regularly by 1% or more of the biogeographic population of a regularly occurring migratory species (other than those listed on Annex I) in any season:

- Eurasian teal *Anas crecca* (North-western Europe) – 4400 - representing 1.1% of the population (5 year peak mean, 1992/3-1996/7).
- Dark-bellied brent goose *Branta bernicla bernicla* (Western Siberia/Western Europe) - 7506 – representing 2.5% of the population (5 year peak mean, 1992/3-1996/7).
- Ringed plover *Charadrius hiaticula* (Europe/Northern Africa - wintering) – 552 - representing 1.1% of the population (5 year peak mean, 1992/3-1996/7).
- Black-tailed godwit *Limosa limosa islandica* (Iceland - breeding) – 1125 - representing 1.6% of the population (5 year peak mean, 1992/3-1996/7).

4.5 The site is also regularly used by over 20000 waterfowl (as defined by the Ramsar Convention) in any season. Five year peak mean 51361 (1992/93 – 1996/97).

4.6 Solent and Southampton Water also qualifies as a Ramsar site under four criteria (1, 2, 5 and 6):

- **Criterion 1:** The site is one of the few major sheltered channels between a substantial island and mainland in European waters, exhibiting an unusual strong double tidal flow and has long periods of slack water at high and low tide. It includes many wetland habitats characteristic of the biogeographic region: saline lagoons, saltmarshes, estuaries, intertidal flats, shallow coastal waters, grazing marshes, reedbeds, coastal woodland and rocky boulder reefs.
- **Criterion 2:** The site supports an important assemblage of rare plants and invertebrates. At least thirty three (33) British Red Data Book invertebrates and at least eight (8) British Red Data Book plants are represented.
- **Criterion 5:** The site contains avian assemblages of international importance whereby species with peak counts in winter are 51,343 waterfowl (5 year peak mean 1998/99-2002/2003).
- **Criterion 6:** A wetland should be considered internationally important if it regularly supports 1% of the individuals in a population of one species or subspecies of waterbird.
Species with peak counts in winter are:
 - Black-tailed godwit, *Limosa limosa islandica*, (Iceland/W Europe) - 1,240 individuals, representing an average of 2.6% of the population (5 year peak mean 1998/9-2002/3);
 - Dark-bellied brent goose, *Branta bernicla bernicla* - 6,456 individuals, representing an average of 3.2% of the population (5 year peak mean 1998/9-2002/3); and
 - Eurasian teal, *Anas crecca* (NW Europe) - 5,514 individuals, representing an average of 1.1% of the population (5 year peak mean 1998/9-2002/3).

Species with peak counts in spring/autumn are:

- Ringed plover *Charadrius hiaticula* (Europe/Northwest Africa) – 397 individuals, representing an average of 1.2% of the GB population (5 year peak mean 1998/9-2002/3).

Conservation objectives

- 4.7 The conservation objectives of the SSW SPA are set out in a Natural England publication⁷ and are set for each qualifying feature for which the site is classified. Where the objectives are met, the site will be considered to exhibit a high degree of integrity and to be contributing to achieving the aims of the Wild Birds Directive.

With regard to the SPA and the individual species and/or assemblage of species for which the site has been classified (the ‘Qualifying Features’ listed), and subject to natural change:

Ensure that the integrity of the site is maintained or restored as appropriate, and ensure that the site contributes to achieving the aims of the Wild Birds Directive, by maintaining or restoring;

- *The extent and distribution of the habitats of the qualifying features*
- *The structure and function of the habitats of the qualifying features*
- *The supporting processes on which the habitats of the qualifying features rely*
- *The population of each of the qualifying features*
- *The distribution of the qualifying features within the site.*

Portsmouth Harbour SPA/Ramsar

- 4.8 Portsmouth Harbour is a large industrialised estuary and includes one of the four largest expanses of mud-flats and tidal creeks on the south coast of Britain⁸. The mud-flats support large beds of narrow-leaved eelgrass *Zostera angustifolia* and dwarf eelgrass *Z. noltii*, extensive green algae beds, mainly *Enteromorpha* species, and sea lettuce *Ulva lactuca*. Portsmouth Harbour has only a narrow connection to the sea via the Solent, and receives comparatively little fresh water, thus giving it an unusual hydrology. The site supports important numbers of wintering dark-bellied brent geese *Branta b. bernicla*, which feed also in surrounding agricultural areas away from the SPA. The proposals lie within 1.7km of the PH SPA.
- 4.9 Portsmouth Harbour qualifies as a SPA under Article 4.2 of the Directive (79/409/EEC) by supporting internationally or nationally important wintering populations of the following species of migratory water fowl:
- Dark-bellied brent goose *Branta bernicla bernicla* - 2290 – representing 1.3% of the north-west European population and 2.5% of the British

⁷ Natural England, 2014: European Site Conservation Objectives for Solent & Southampton Water Special Protection Area. Site Code: UK9011061.

⁸ <https://designatedsites.naturalengland.org.uk/SiteDetail.aspx?SiteCode=S1003174>

wintering population (5 year peak mean, 1986/87-1990/91).

- Red breasted merganser *Mergus serrator* – 100 - representing 1% of the British wintering population (5 year peak mean, 1986/87-1990/91).
- Black-tailed godwit *Limosa limosa islandica* – 70 - representing over 1% of the British wintering population (5 year peak mean, 1986/87-1990/91).
- Dunlin *Calidris alpina* – 8010 - representing over 1% of the British wintering population (5 year peak mean, 1986/87-1990/91).

4.10 Portsmouth Harbour also qualifies as a Ramsar site under two criteria (3 and 6):

- **Criterion 3:** The intertidal mudflat areas possess extensive beds of narrow-leaved and dwarf eelgrass, which support the grazing dark-bellied brent geese populations. The mud-snail *Hydrobia ulvae* is found at extremely high densities, which helps to support the wading bird interest of the site. Common cord-grass *Spartina anglica* dominates large areas of the saltmarsh and there are also extensive areas of green algae *Enteromorpha* spp. and sea lettuce *Ulva lactuca*. More locally the saltmarsh is dominated by sea purslane *Halimione portulacoides* which gradates to more varied communities at the higher shore levels. The site also includes a number of saline lagoons hosting nationally important species.
- **Criterion 6:** A wetland should be considered internationally important if it regularly supports 1% of the individuals in a population of one species or subspecies of waterbird.
Species with peak counts in winter are:
 - Dark-bellied brent goose - 2,105 individuals, representing an average of 2.1% of the GB population (5 year peak mean 1998/9-2002/3);

Conservation objectives

4.11 The conservation objectives of the PH SPA are set out in a Natural England publication⁹ and are set for each qualifying feature for which the site is classified. Where the objectives are met, the site will be considered to exhibit a high degree of integrity and to be contributing to achieving the aims of the Wild Birds Directive.

With regard to the SPA and the individual species and/or assemblage of species for which the site has been classified (the 'Qualifying Features' listed), and subject to natural change:

Ensure that the integrity of the site is maintained or restored as appropriate, and ensure that the site contributes to achieving the aims of the Wild Birds Directive, by maintaining or restoring;

- *The extent and distribution of the habitats of the qualifying features*
- *The structure and function of the habitats of the qualifying features*
- *The supporting processes on which the habitats of the qualifying*

⁹ Natural England, 2014: European Site Conservation Objectives for Portsmouth Harbour Special Protection Area. Site Code: UK9011051.

features rely

- The population of each of the qualifying features
- The distribution of the qualifying features within the site.

Solent Maritime Special Area of Conservation (SAC)

- 4.12 The proposals lie over 7 km from the closest point of the SM SAC. The Annex I habitats that are a primary reason for selection of this site are:

1130 Estuaries

The Solent encompasses a major estuarine system on the south coast of England with four coastal plain estuaries (Yar, Medina, King's Quay Shore, Hamble) and four bar-built estuaries (Newtown Harbour, Beaulieu, Langstone Harbour, Chichester Harbour). The site is the only one in the series to contain more than one physiographic sub-type of estuary and is the only cluster site. The Solent and its inlets are unique in Britain and Europe for their hydrographic regime of four tides each day, and for the complexity of the marine and estuarine habitats present within the area. Sediment habitats within the estuaries include extensive estuarine flats, often with intertidal areas supporting eelgrass *Zostera* spp. and green algae, sand and shingle spits, and natural shoreline transitions. The mudflats range from low and variable salinity in the upper reaches of the estuaries to very sheltered almost fully marine muds in Chichester and Langstone Harbours. Unusual features include the presence of very rare sponges in the Yar estuary and a sandy 'reef' of the polychaete *Sabellaria spinulosa* on the steep eastern side of the entrance to Chichester Harbour.

1320 *Spartina* swards (*Spartinion maritimae*)

The Solent contains the second-largest aggregation of Atlantic salt meadows in south and south-west England. Solent Maritime is a composite site composed of a large number of separate areas of saltmarsh. In contrast to the Severn estuary, the salt meadows at this site are notable as being representative of the ungrazed type and support a different range of communities dominated by sea-purslane *Atriplex portulacoides*, common sea-lavender *Limonium vulgare* and thrift *Armeria maritima*. As a whole the site is less truncated by man-made features than other parts of the south coast and shows rare and unusual transitions to freshwater reedswamp and alluvial woodland as well as coastal grassland. Typical Atlantic salt meadow is still widespread in this site, despite a long history of colonisation by cord-grass *Spartina* spp.

- 4.12 Annex I habitats present as a qualifying feature, but not a primary reason for selection of this site:
- 1110 Sandbanks which are slightly covered by sea water all the time
 - 1140 Mudflats and sandflats not covered by seawater at low tide
 - 1150 Coastal lagoons (priority feature)
 - 1210 Annual vegetation of drift lines
 - 1220 Perennial vegetation of stony banks
 - 1310 Salicornia and other annuals colonising mud and sand

- 2120 “Shifting dunes along the shoreline with *Ammophila arenaria* (“white dunes”)

4.13 Annex II species present as a qualifying feature, but not a primary reason for site selection: 1016 Desmoulin’s whorl snail *Vertigo moulinsiana*¹⁰.

Conservation objectives

4.14 The conservation objectives of the SM SAC are set out in a Natural England publication¹¹ and are set for each qualifying feature Annex 1 habitat & Annex 2 species for which the site is classified. Where the objectives are met, the site will be considered to exhibit a high degree of integrity and to be contributing to achieving Favourable Conservation Status for that habitat type at a UK level. The term ‘favourable conservation status’ is defined in Article 1 of the Habitats Directive. *With regard to the SAC and the natural habitats and/or species for which the site has been designated (the ‘Qualifying Features’ listed below), and subject to natural change; Ensure that the integrity of the site is maintained or restored as appropriate, and ensure that the site contributes to achieving the Favourable Conservation Status of its Qualifying Features, by maintaining or restoring;*

- *The extent and distribution of qualifying natural habitats and habitats of qualifying species*
- *The structure and function (including typical species) of qualifying natural habitats*
- *The structure and function of the habitats of qualifying species*
- *The supporting processes on which qualifying natural habitats and the habitats of qualifying species rely*
- *The populations of qualifying species*
- *The distribution of qualifying species within the site.*

Solent & Dorset Coast Special Protection Area (SPA)

4.15 The Solent and Dorset Coast Special Protection Area (SPA) was classified in January 2020 to protect important foraging areas at sea used by terns from colonies within adjacent, already classified, SPAs. The qualifying interest features of the SPA are common tern, Sandwich tern and little tern. Solent and Dorset Coast SPA qualifies under Stage 1.1 by regularly supporting more than 1% of the GB population of Sandwich tern, common tern and little tern, species listed in Annex I of the Birds Directive¹².

4.16 The SPA covers all areas to the mean high-water mark in Portsmouth Harbour, sub-tidal areas with Southampton Water and the River Hamble

¹⁰ <https://designatedsites.naturalengland.org.uk/SiteGeneralDetail.aspx?SiteCode=UK0030059&SiteName=solent%20maritime%20sac&countyCode=&responsiblePerson=&SeaArea=&IFCAAarea=>

¹¹ Natural England, 2014: European Site Conservation Objectives for Solent Maritime Special Area of Conservation. Site Code: UK0030059.

¹² Natural England (2016) Solent and Dorset Coast potential Special Protection Area (pSPA). Departmental brief.

(below the mean low water mark) and to the mean high water mark along the coast where terns are not already a qualifying feature of existing SPAs between Worbarrow Bay in Dorset and Bognor Regis in West Sussex. It does not cover the sub-tidal areas of Langstone and Chichester Harbour where the landward boundary is formed by the mean low water as breeding terns are already a feature of the Chichester and Langstone Harbours SPA.

4.17 Draft conservation objectives for the SPA were published in February 2019 by Natural England prior to the site being classified. *With regard to the potential SPA and the individual species and/or assemblage of species for which the site may be classified and subject to natural change these are to ensure that the integrity of the site is maintained or restored as appropriate, and ensure that the site contributes to achieving the aims of the Wild Birds Directive, by maintaining or restoring;*

- *The extent and distribution of the habitats of the qualifying features*
- *The structure and function of the habitats of the qualifying features*
- *The supporting processes on which the habitats of the qualifying features rely*
- *The population of each of the qualifying features, and,*
- *The distribution of the qualifying features within the site.*

5.0 Likely significant effect test

- 5.1 The first test of Regulation 63 of the Habitats Regulations requires an assessment of whether the proposed residential units comprising part of the application, are likely to have a significant effect on the European sites in question, either alone or in combination with other plans and projects. The SANG that forms part of the application cannot be considered within this test because it is included in the application as mitigation of recreational impacts and would not be included were there not a need to mitigate this impact on European sites (see para 2.1).
- 5.2 Table 2 on the following page shows the potential pathways through which impacts could arise through development of Welborne on the Solent European nature conservation sites.

Table 2 Solent & Southampton Water SPA, Portsmouth Harbour SPA & corresponding Ramsar sites – assessment of likely significant effects

√	Likely significant adverse effect on the Natura 2000 site		x	Not likely to have a significant adverse effect on the Natura 2000 site	
-	The principle is not relevant to the screening exercise		?	Uncertain effect on the Natura 2000 site	
Check list of change	Reduction in area of Annex 1 habitats?	Direct effects on the populations of species for which the site is designated	Indirect effects on the populations of species for which the site was designated or classified due to loss or degradation of their habitat (quantity/quality)?	Changes to the composition of the habitats for which the site was designated (e.g. reduction in species structure, abundance or diversity that comprises the habitat over time)?	Interruption or degradation of the physical, chemical or biological processes that support habitats and species for which the site was designated or classified?
Potential impacts					
Land take	-	X	-	-	-
		The site lies outside the boundary of the SPA. No land take within the SPA is required, & no direct impacts on populations for which the SPA is classified will occur.			
Wintering birds: increased recreational disturbance	-	-	√	-	-
			The scale of residential build (6000 units) and proximity of the site to the SPA boundary (within 5.6km) means that without mitigation, the proposals are likely to increase recreational pressures on the intertidal habitats on which wintering waterfowl feed and roost. Without mitigation, the residential development would be expected to increase disturbance pressures on the SPA from the following recreational activities: <ul style="list-style-type: none"> • walking • dog walking • jogging • cycling • other. 		

Breeding birds: increased recreational disturbance			X	X	X
			The breeding colonies within the SSW SPA are located a significant distance from Welborne. The closest tern colony is at Titchfield Haven. Given the distance from the development and their inaccessibility no likely significant effects are predicted with respect to the breeding bird assemblage for which the SPA's are classified. No likely significant effect alone or in combination with other plans and projects.		
Disturbance of wintering & breeding birds from construction activities	-	-	X	X	X
			Welborne is distant to the nearest point of both the PH SPA & the SSW SPA (1.4km distant). The distance prevents any risk of disturbance to wintering of breeding birds through construction noise or movement. No likely significant effect alone or in combination with other plans and projects.		
Hydrological changes, including: • water quality • flows • abstraction • nutrient levels	-	-	√	√	√
	Existing infrastructure will be used, meaning no risk of direct impact	Existing infrastructure will be used, meaning no risk of direct impact	Water quality: The site is physically separated from the habitats of the SSW & PH SPA's by Fareham and is over 4km away from the closest point of the SSW SPA. The risk of contamination to water courses from spillage and siltation will be controlled through a Framework Construction Environmental Management Plan (CEMP) which has been submitted with the planning application and whose requirement will be a condition of the planning consent. No likely significant effect alone or in combination with other plans and projects. Foul water: this assessment assumes that all foul water will be treated at Peel Common, a Southern Water facility and Treatment Works. The development could result in increased nitrogen outputs to the SPA through the increase of foul water that Peel Common deals with, and the eventual discharge to sea via outfalls into the Solent waters, which can cause an increase in nutrient loading (nitrogen). The nitrogen balance of the Welborne proposals has been modelled using a model developed by Natural England ¹³ . This reconciles the balance of open space and residential development relative to the previous intensive arable land use. It relies on the provision of SANG and other green spaces as part of the calculation. Natural England has advised that this must be considered mitigation and cannot be considered at the Likely Significant Effect stage ¹⁴ . On this basis, it is concluded that nitrogen outputs to the SPA as a result of the residential dwellings included within the Welborne proposals, but without consideration of SANG or formal or informal greenspace are likely to have a significant effect alone and in combination with other plans and projects. Flood risk: Drainage strategy is to use existing topography and enhanced infiltration to replicate the existing situation and offer betterment. The flood risk to and arising from the Proposed Development from coastal and tidal and artificial sources is assessed as being negligible. The evidence for this conclusion can be found in the updated FRA ¹⁵ submitted in support		

¹³ Anon, 2019. Advice on achieving nutrient neutrality for new development in the Solent Region for Local Planning Authorities. Natural England.

¹⁴ Natural England 2019. Advice to Fareham Borough Council from Rachel Jones. 19th September 2019.

¹⁵ WSP, 2018. Welborne, Fareham. Flood Risk Assessment & Surface Water Drainage Strategy. For Buckland Development Ltd.

			<p>of the planning application. No likely significant effect alone and in combination with other plans and projects.</p> <p>Water abstraction: water will not be abstracted or diverted on site: all watercourses will be retained and protected during construction. Neither will additional abstractions to secure water supply to the Welborne proposals affect the hydrology of the SPA habitats on which bird populations rely. Welborne falls in the Portsmouth Water supply zone, which has sufficient resource to ensure sustainable abstraction levels from key water sources for the plan period (inclusive of Welborne). HRA of the draft Water Resource Management Plan concludes that the schemes will operate within existing abstraction license volumes and there will be no likely significant effects on any European sites as a result of the operation of these schemes, alone or in combination with other plans or projects¹⁶ No likely significant effect alone and in combination with other plans and projects.</p>		
Air quality changes	-	-	X	X	X
			<p>The potential impact of decreased air quality on the Solent & Southampton Water SPA will not directly affect the waterfowl species for which the SPA is designated. However, in the event of changes to the ecological structure and function of the system on which the waterfowl depend, it is possible to identify a pathway for impact. Air quality data has therefore been assessed with reference to critical loads of nitrogen and critical levels, a quantitative estimate of exposure of vegetation to nitrogen compounds in gaseous form. Both critical loads and critical levels, and changes to them as a consequence of increased traffic generated by the Welborne proposals, are compared to values below which significant effects on intertidal habitats do not occur. Modelling has shown that whilst exceedances of 1% of the Critical Level for NO_x of 30µg/m³ are predicted to occur within SSW SPA between 45 and 85m from the roads edge (1.5% to 1%), the Critical Level will be met in 2036 both with and without the Welborne. No adverse effects are considered likely. Furthermore, changes in NO_x are often referred to as a precursor to N deposition. The results for N deposition (inclusive of traffic related ammonia emissions) for SSW SPA indicate that the lower Critical Load of 20 kg/N/ha/year will be met in 2036, both with and without Welborne. The predicted changes due to the proposed development 'alone' are all below 1% of the relevant Critical Load except at 0m from the roads edge. In all locations assessed, total N deposition in 2036 is reduced from baseline case.¹⁷ No likely significant effect alone or in combination with other plans and projects.</p>		

¹⁶ Amec Foster Wheeler, Feb 2018. Water Resources Management Plan 2019. Habitats Regulations Assessment of the Consultation Draft WRMP. For Portsmouth Water.

¹⁷ WSP, November 2020. Air Quality Technical Memorandum – Addressing changes to best practice and guidance since the submission of the Environmental Statement (ES) Addendum

Table 3: Solent Maritime SAC – assessment of likely significant effects

Check list of change		Reduction in area of Annex 1 habitats?	Direct effects on the populations of species for which the site is designated	Indirect effects on the populations of species for which the site was designated or classified due to loss or degradation of their habitat (quantity/quality)?	Changes to the composition of the habitats for which the site was designated (e.g. reduction in species structure, abundance or diversity that comprises the habitat over time)?	Interruption or degradation of the physical, chemical or biological processes that support habitats and species for which the site was designated or classified?
√	Likely significant adverse effect on the Natura 2000 site			x	Not likely to have a significant adverse effect on the Natura 2000 site	
-	The principle is not relevant to the screening exercise			?	Uncertain effect on the Natura 2000 site	
Potential impacts						
Land take	-	X	-	-	-	-
	The site lies outside the boundary of the SAC. No land take within the SAC is required, & no direct impacts on populations or habitats for which the SAC is designated will occur.					
Increased damage from recreational activity	-	-	X	X	X	
			<p>The River Hamble forms the easternmost element of the Solent Maritime SAC approximately 7km from Welborne. Access to this section of the European site south of the A27 is via a footpath running from Lower Swanwick to Warsash along the eastern side of the Hamble.</p> <p>North of the M27 access to the Solent Maritime SAC is from Manor Farm Country Park on the western bank and from National Trust land at the upper reaches of the estuary at Curbridge (on the eastern bank).</p> <p>Parking is available at Warsash, Manor Farm Country Park and (limited) at the Horse and Jockey pub at Curbridge.</p> <p>Given the distance of the SAC from the development and the travel times involved it is unlikely that the SAC will attract a substantial number of regular visitors from Welborne. The Annex 1 habitats present along the Hamble (mudflats and saltmarsh) are relatively robust habitats and are unlikely be impacted by trampling. No measurable direct impact (trampling) deriving from Welborne is forecast.</p> <p>The Annex 2 species for which the SAC is classified are unlikely to occur in saltmarsh and mudflat habitats.</p> <p>No likely significant effect alone or in combination with other plans and projects.</p>			
	-	-	X	X	X	

Disturbance from construction activities			As for the Ramsar and SPA, the site is over 5km distant from the nearest point of the Solent Maritime SAC and is too distant to pose a material risk from construction activities. The proposals are not therefore likely to have a significant effect on the Solent Maritime SAC.		
Hydrological changes, including: • water qual • flows • abstraction • nutrient levels	-	-	X	X	X
	Existing infrastructure will be used, meaning no risk of direct impact		The same conclusion holds as for the SPA's & Ramsar sites – see discussions above in Table 2 On the basis of Natural England's advice - likely significant effect alone or in combination with other plans and projects.		
Air quality changes	-	-	X	X	X
			See discussion in relation to the SPA's & Ramsar sites. The same conclusion holds for interest features of the SAC as that set out in Table 2 with regard to critical loads. In 2036 with the scheme and in-combination traffic growth the lower end of the critical load range of 20-30kg/N/ha/yr, N will be exceeded at up to 50m from road edge downstream and 45m from road edge upstream of the M27 crossing. This represents an improvement in the extent of N deposition compared to the baseline conditions. The area affected is open water. Given the 2036 situation represents an improvement in current conditions no likely significant effects are predicted. At four locations the air quality modelling has shown that in 2036 the proposals will result in an increase in the annual mean critical level for NO _x (30µg/m ³) of over 1% at five locations (A3051 and both up and down stream of the A27 and M27 crossings). However, at all points along these transects the NO _x level remains below 30µg/m ³ and is below the relevant critical level. As the area affected by increases in critical levels of NO _x above 1% of the annual mean does not exceed the critical level threshold of 30µg/m ³ , no adverse impacts are anticipated on SAC habitats or species. The changes in critical levels of ammonia related to emissions from traffic are only considered to be relevant to the assessment where they add to nitrogen deposition (see above). The SAC is not considered to support assemblages of lower plants in the areas affected by changes in ammonia levels. The lower end of the critical level range for ammonia (2µg/m ³ set for the protection of higher plants) will be exceeded upstream (190m from road edge) and downstream (150m from road edge) at the M27 crossing in 2036. This occurs with and without the proposals. These areas comprise sub-tidal habitats and no adverse effects are considered likely. No likely significant effect alone or in combination with other plans and projects.		

Table 4: Solent & Dorset Coast SPA – assessment of likely significant effects

Check list of change		Reduction in area of Annex 1 habitats?	Direct effects on the populations of species for which the site is designated	Indirect effects on the populations of species for which the site was designated or classified due to loss or degradation of their habitat (quantity/quality)?	Changes to the composition of the habitats for which the site was designated (e.g. reduction in species structure, abundance or diversity that comprises the habitat over time)?	Interruption or degradation of the physical, chemical or biological processes that support habitats and species for which the site was designated or classified?
√	Likely significant adverse effect on the Natura 2000 site			x	Not likely to have a significant adverse effect on the Natura 2000 site	
-	The principle is not relevant to the screening exercise			?	Uncertain effect on the Natura 2000 site	
Potential impacts						
Land take	-	X	-	-	-	-
	The site lies outside the boundary of the SPA. No land take within the SPA is required, & no direct impacts on populations or habitats for which the SPA is designated will occur.					
Increased disturbance from recreational activity	-	-	X	X	X	
			<p>The habitats within the SPA relate to sub-tidal and inter-tidal areas. As terns largely forage in shallow water inter-tidal areas will be used by foraging terns over the high-water period. There will be no indirect impacts on these habitats as a result of the Welborne development.</p> <p>Given the distance common and Sandwich terns will range from breeding colonies it is unlikely there will be any significant impacts on the population or distribution of foraging terns through disturbance associated with the development. Visits to the coast by new residents are likely to be widely distributed across sites and are unlikely to reach densities at specific locations where they would impact on foraging terns. Furthermore, the foraging ecology of terns means that feeding activity is unpredictable and regular large congregations of birds in favoured areas are rare. All species are known to be tolerant of human activities when foraging and can be observed feeding very close to sea-walls, around marinas and within harbours and along beaches throughout the SPA. Any increase in recreational activity associated with the Welborne development is highly unlikely to disrupt foraging terns.</p> <p>No likely significant effect alone or in combination with other plans and projects.</p>			
Disturbance from construction activities	-	-	X	X	X	
			The site is 1.4km distant from the nearest point of the Dorset & Solent SPA and is too distant to pose a material risk from construction activities.			

			No likely significant effect alone or in combination with other plans and projects		
Hydrological changes, including: • water qual • flows • abstraction • nutrient levels	-	-	X	X	X
	Existing infrastructure will be used, meaning no risk of direct impact		The same conclusion holds as for the SAC, SPA's & Ramsar sites – see discussions above in Table 2. On the basis of Natural England's advice - likely significant effect alone or in combination with other plans and projects.		
Air quality changes	-	-	X	X	X
			See discussion in relation to the SAC, SPA's & Ramsar sites. No likely significant effect alone or in combination with other plans and projects.		

- 5.3 The analysis in Tables 2-4 establishes potential pathways for disturbance to wintering waterfowl populations in the SSW SPA & PH SPA and Ramsar sites, occurring as a result of the increased local population generated by the Welborne proposals acting alone and in combination with other schemes to increase recreational pressures on their intertidal habitats. In the absence of being able to consider the SANG at this stage of assessment, and with regard only to the potential impact of recreational pressures, proposals are considered likely to have a significant effect both alone and in combination with other projects on the:
- Solent and Southampton Water Special Protection Area (SSW SPA),
 - Portsmouth Harbour Special Protection Area (PH SPA)
 - associated Ramsar sites
- 5.4 This conclusion generates a requirement for an appropriate assessment to address the impact of increased recreational pressures deriving from Welborne on the integrity of each of these sites (see Section 6.0).
- 5.5 Tables 2-4 also show a potential impact pathway for increased nitrogen into the Solent. This conclusion derives from Natural England's advice stating that the assessment of the net nitrogen balance of the Welborne proposals must occur without consideration of the SANG or other green space brought forward as part of the proposals at the likely significant effect stage. A likely significant effect is therefore predicted for all of the identified European nature conservation sites on account of increased nitrogen and Appropriate Assessment is required.
- 5.8 Tables 1 & 2 also show that whilst a potential impact pathway has been identified for air quality, detailed modeling has shown that increases in traffic will not generate more than 1% of the nitrogen critical load (inclusive of ammonia emissions from traffic) for sensitive habitats and species. Changes in relevant critical levels for these sites have been assessed and no likely significant effects have been identified. Furthermore, the proposals are distant to the Annex 1 habitats & Annex 2 species for which the Solent Maritime SAC is designated, and no likely significant effect is anticipated. Appropriate Assessment is not therefore required.
- 5.9 On this basis, it is considered that an appropriate assessment is required to consider:
- the potential impact of increased recreational pressures on the waterfowl populations of the SSW SPA, PH SPA and associated Ramsar sites
 - the potential impact of increased nitrogen on the features of the SSW SPA, PH SPA, SM SAC & S&DC SPA
- 5.10 Issues of air quality have been assessed as not likely to be significant alone or in combination and are therefore screened out from further consideration.

6.0 Appropriate assessment

- 6.1 Section 5 identified the possible pathways likely to have a significant on each of the Solent Natura 2000 sites, either alone or in combination with other projects. In the absence of mitigation, the analysis identified the need for appropriate assessment of the impact of increased recreational pressures on wintering waterfowl and increased nitrogen inputs into the Solent, to establish whether the proposals will have an adverse effect on integrity of the Solent European nature conservation sites, either alone or in combination with other projects.

Impacts of recreation

- 6.2 The potential impacts of increased levels of recreational activity on wintering waterfowl populations is well-documented with extensive research undertaken during 2009-2013 to assess the impact on wintering birds on the Solent coast. This work was known as the Solent Disturbance Mitigation Project and has reported through the SRMP.
- 6.3 The SRMP and subsequent SRMS have provided evidence to Natural England and Local Planning Authorities that new housing development within 5.6km of the Solent coastline is likely to have an adverse affect on internationally protected birds both alone, and in combination with other plans and projects. 70% of people visiting the coast for recreational purposes originate from this zone¹⁸, with these visits occurring for a range of reasons - although the majority are for dog-walking, walking, jogging and cycling.
- 6.4 The SRMP identified the potential of increased recreational pressures to cause additional disturbance to coastal birds that fly from Arctic Siberia to spend the winter on the Solent. These birds need to feed undisturbed if they are to survive the winter and fly back to their summer habitats.
- 6.5 The impact of increased disturbance on wintering waterfowl populations is difficult to quantify, but can result in increased mortality over the wintering period and during extreme weather events because birds are less able to feed. It can also reduce their condition at the end of the wintering period such that they are less able to fly back to summer breeding grounds, and less able to breed successfully once they arrive. Regardless of mechanism, the overall impact is the same, with all working against the successful maintenance of the breeding population.

Welborne

- 6.6 The development of Welborne will increase the local population of the Fareham area by an approximate total of 14,400 over the next 25 + years within the 5.6km zone identified by the SRMS. It is therefore reasonable to assume that without mitigation, Welborne residents will travel to the coast

¹⁸ Liley D & Tyldesley D (2013) Solent Disturbance & Mitigation Project Phase III. Towards an Avoidance and Mitigation Strategy. Paragraphs 7.28 – 7.30

for purposes of informal recreation and will contribute both alone and in combination with other consented schemes to increased recreational pressures with the potential to adversely affect the over wintering success of waterfowl populations. This is contrary to the conservation objectives for both the SSW SPA and the PH SPA, which require that the integrity of the habitats on which populations of individual species and/or assemblage of species for which the site has been classified, be maintained.

Mitigation

- 6.7 The concept of Suitable Alternative Natural Greenspace (SANG) is well established in the Thames Basin, where it is provided to divert recreational pressures from important heathland habitats. Welborne Plan Policy WEL30 recognises that SANG has a similar role to play at Welborne and requires the provision of around 84 hectares of inter-connected accessible semi-natural greenspace to mitigate the impact of Welborne residents travelling to the coast for purposes of informal recreation. SANG acts to draw visitor and recreational pressure of new and/or existing residents away from the coast by providing an alternative, convenient recreational resource. The Welborne Plan is clear that major development sites such as Welborne will substantially avoid or mitigate their potential impacts through the provision of suitable natural green space on or immediately adjoining the site, a conclusion that has been formally tested through Inquiry.
- 6.8 Section 4.0 sets out a description of the SANG provided to mitigate the impact of Welborne on the Solent coast. The Welborne proposals include for a gross area of 70.4ha of SANG, of which 60.1ha has been identified as effective SANG. The SANG will be provided as part of the development and will be brought forward in a phased manner to ensure that as the site is progressively occupied, it is available at the relevant proportion.
- 6.9 The Welborne SANG is provided in full accordance with the qualitative standards set out in both the Welborne Plan and the SANG standards published by Natural England in relation to the Thames Basin Heaths SPA. An analysis of the Welborne SANG against these standards is included at Appendix 7.
- 6.10 The SANG:
- has been designed so as to maximise appeal and accessibility to new residents of Welborne, as well as existing local residents and is interconnected with the wider GI strategy to ensure that residents can access it through a network of green space, regardless of where they live on the Welborne site.
 - is of sufficient size to provide a meaningful space for informal recreation, providing a range of dog-walking routes greater than 2.3km and wider interconnected walks of greater than 5km.
 - the phasing strategy has been designed to ensure that SANG will be available for occupations at a rate that is at least proportional to the numbers of units on site as a proportion of the total.
 - has been designed to respond to Natural England guidance setting out 'must have' and 'desirable' characteristics of effective SANG
 - has been designed to exceed minimum requirements set out in

paragraph 8.24 of the Welborne Plan

- links and contributes to wider recreational opportunities through links to the Meon Way to the north, Fareham town to the south, and to a range of public rights of way.
- will be managed by the Land Trust or another suitable and well recognised land management organisation.
- will be leased to the appointed manager for at least an 80-year (in perpetuity) period.
- will be resourced and secured in perpetuity. The SANG Management Plan sets out the mechanism for funding and management of the SANG and provides a valid and costed delivery plan. This has been agreed with Natural England as fit for purpose and can be secured through the S106.

- 6.11 The Welborne Plan identifies the need for around 84ha of SANG unless an alternative strategy is agreed with Natural England. The proposals are able to guarantee delivery of 49.8ha of SANG, with a further 20.7ha discounted by 50% to allow for the motorway noise to which Fareham Common and part of the Welborne Mile will be subject. Overall therefore, the Welborne proposals include for 60.1ha of effective SANG, providing a well recognised means of diverting recreational pressures from sensitive habitats and species. Note that the consented access track across the southern toe of the Welborne Mile SANG is not considered to affect the function of this part of the SANG and the calculations to establish effective SANG remain unchanged. The access track will be used by individual vehicles on an occasional basis. Users will be able to walk along the track as a route through this part of the SANG and will simply step aside in the event that a vehicle seeks to pass.
- 6.12 The effectiveness of the SANG relies on ease of access and its convenience to the user, both of which have been key considerations in the development of the green networks and infrastructure strategy that support SANG function. Furthermore, the appointment of the Land Trust or other suitable land management organisation to manage the SANG in perpetuity, an experienced and appropriate land management organisation, will ensure that the SANG is managed and well maintained, thereby remaining an attractive recreational opportunity for local users. On this basis, it can be concluded that whilst the proposals do not include for SANG at the rate specified in the Welborne Plan, the SANG that can be provided will be effective in diverting recreational pressure from the coast.

An agreed alternative strategy

- 6.13 The Welborne Plan allows for flexibility for mitigation package if it is not possible to deliver around 84ha of SANG, so long as the package is agreed with Natural England. A mitigation package has been negotiated with Natural England that allows for an increased partial payment to the SRMS as well as the provision of SANG to provide a bespoke solution¹⁹.
- 6.14 The SRMS enables a housebuilder to make a monetary 'developer

¹⁹ Agreed minutes of meeting between Buckland Development Ltd, Natural England & Fareham Borough Council. 5th November 2018

contribution' for the strategic mitigation of recreational pressures that would otherwise occur over a wide area, instead of needing to provide bespoke mitigation themselves²⁰. The effect of this is to allow developers to address impacts of proposals alone and in combination with other plans and projects through a payment that has been ratified as 'fit for purpose' by all key nature conservation stakeholders (both statutory and non statutory).

- 6.15 The Welborne Plan requires the Welborne proposals to come forward with around 84ha of SANG with a part payment to Bird Aware, recognising that:
- this extent of SANG does not meet the 8ha per 1000 new population promoted by the Thames Basin Heaths as a mitigation standard; and,
 - in combination impacts are also relevant.
- 6.16 The proposals have come forward with 60.1ha of effective SANG, recognising the risk that new residents may not use areas affected by the noise of the motorway to the extent that they use quieter areas. Natural England has agreed that it is appropriate to extend the principle set out in the Welborne Plan of a part payment to Bird Aware to address the discrepancy between the area of effective SANG provision and the 84ha envisaged in policy. It is agreed that this will be achieved through increasing the proportional payment to Bird Aware, recognising that a reduced area of effective SANG is less able to absorb recreational users on site. A greater contribution to strategic mitigation measures provided through Bird Aware is therefore relevant.

Contribution to Bird Aware

- 6.17 A contribution agreed with Natural England will be made to Bird Aware on a phased basis to facilitate management of visitor access to the Solent coast. The contribution has been calculated to reflect the requirements of the Welborne Plan and the reduced capacity of Fareham Common and the Welborne Mile to act as SANG by virtue of their proximity to the motorway. This is consistent with the Welborne Plan that allows for a bespoke solution where it can be agreed with the local planning authority and Natural England that it will fully mitigate the recreational impact of the development.
- 6.18 Box 1 sets out the basis on which the contribution has been calculated and agreed with Natural England.

Box 1: Basis of calculation for contributions to Bird Aware

Welborne Plan Policy WEL30 identifies a requirement for the provision of SANG at a rate of 70% of the Thames Basin Heaths standard. This equates to 5.6ha of SANG for 1000 head of population. On this basis, the Welborne Plan identifies the need for around 84ha of SANG.

Policy WEL30 allows for variation in the mitigation package in the event that the full 84ha of SANG provision cannot be achieved, stating that:
'Unless an alternative strategy is agreed by the Council and Natural

²⁰ Para 1.18 of the Solent Recreation Mitigation Strategy.

England, (which might require more or less green infrastructure) in order to avoid or mitigate potential impacts on the internationally protected sites on the Solent, it is expected that around 84 hectares of suitable alternative natural green space (SANGS) shall be provided either on or immediately adjoining the site'.

WEL30 also states that 'A financial contribution shall also be required towards implementing the Solent Recreation and Mitigation Strategy [now Bird Aware]. This shall provide for the mitigation of the potential impacts on the internationally protected sites along the Solent coastline that cannot be achieved solely through the delivery of on and off-site green infrastructure at Welborne'.

Natural England has agreed that the contribution to Bird Aware should recognise the overall shortfall of SANG from the Thames Basin Heaths standard provision.

Welborne SANG: 60.1ha, providing for 14,796 new residents.

This equates to 4.06ha of SANG per 1000 people, which is 50.8% of the Thames Basin Heaths standard of 8ha per 1000 people

Contribution to Bird Aware to provide a complete mitigation package:

- 100% - 50.8% = **49.2%**

Contributions will be calculated for each individual Reserved Matter Application (RMA). The contribution will reflect the sliding scale of the Bird Aware tariff below, applied at 49.2% to the mix relevant to the RMA.

- 6.19 A contribution of 49.2% of the full Bird Aware tariff will be made alongside each Reserved Matter Application (RMA) that comes forward as part of each phase. Each contribution will be calculated at 49.2% of the number of units and housing mix relevant to the specific RMA and the sliding scale of the Bird Aware tariff. This approach has been agreed with Natural England and is consistent with the principle that requires each unit to be delivered in conjunction with sufficient SANG and sufficient contribution to ensure that it is fully mitigated. Taken together with the provision of 60.1ha of effective SANG, this payment will therefore ensure that the proposals include for sufficient local and strategic mitigation to prevent the Welborne proposals adversely affecting the integrity of the SSW SPA, PH SPA & associated Ramsar sites both alone and in combination with other plans and projects.

Impacts of increased nitrogen

- 6.20 Natural England has developed a model for the Solent sites that calculates the nitrogen balance relevant to development proposals²¹. Natural England has advised Local Planning Authorities to use this model when undertaking appropriate assessments of residential proposals likely to have significant effects on European nature conservation sites, in line with the requirements of the Habitats Regulations. Natural England has advised that the appropriate

²¹ Advice on achieving nutrient neutrality for new development in the Solent region. Version 5. June 2020. Natural England.

assessment should consider all land uses proposed as part of the application in calculating the nitrogen budget and that this should include SANG as well as formal and informal green space integral to the masterplan. Natural England considers these land uses as mitigation in this context. The Partnership for Urban South Hampshire have published a nitrogen budget calculator on their website. This has been used to undertake the nitrogen budget calculations.

- 6.21 Waste water from Welborne could flow to either Peel Common or the Albion Water Waste Water Treatment Works (WWTW). The Albion Water WWTW currently serves Knowle Village and would require upgrading to serve Welborne.
- 6.22 Peel Common WWTW has already been upgraded to achieve a level of 9mg/l (total nitrogen of treated water) following a Habitat Directive Review of Consents in 2015. At the present time it is assumed all waste water from Welborne will be treated at Peel Common.

Method

- 6.23 The calculations within the model draw on information contained in chapters 3 and 9 of the submitted ES and GI plans, which show areas of different land use and proposed habitat types. It should be noted that the Phase 1 habitat survey was updated in May 2018, and checked again in August 2020, and the most recent land uses have been used in the calculations. In line with Natural England guidance, only occupants of housing, care home and the proposed hotel are included in the assessment. The inclusion of occupants of other land uses such as the schools and businesses is likely to result in double counting by including people resident off-site within the catchment, or capturing residents who live and work on site.
- 6.24 The following assumptions are used for calculations to establish the amount of land required to off-set nitrogen produced by development (see Box 2):
- Natural England and the Environment Agency have agreed to use 90% of the consent value for the neutrality calculations
 - Peel Common WwTW consented discharge level is 9mg/l
 - A 2mg/l reduction is made to the post-treatment level of nitrogen to allow for background levels in treated waste water.
 - 2.4 occupants per house and flats (in line with Natural England guidance).
 - Maximum hotel occupancy of 45 people
 - Note that the number of units used in the nitrogen calculator is higher than the number specified in the application. This is to allow the additional hotel occupants to be factored into the calculations (45 additional people equates to 19 additional units at 2.4 people per unit)
 - Water use of 110 litres per day per person (in line with Natural England guidance and building regulations part (g)²²).
 - Post development land use changes (loss of woodland, scrub, hedgerows, grassland and other habitats) assumed to have post-

²² Building Regulations Part G 2010 (as amended) provision 36. (2) (b) states that where planning policy specifies that 110lppd must be achieved, water efficiency measures to achieve this are a requirement of Building Regulations for new dwellings. This is the case in this development, due to the requirements of Welborne Plan Policy WEL37, which sets a target of 105lppd.

- development leaching rate of 14.3kg/N/ha/yr (urban land)
- All existing land uses have been included in the baseline calculations. This assumes a leaching rate of 5kg/N/ha/yr for the following habitats: hedgerows, ditches, scrub, ruderal, quarry and standing water. Woodland and grassland (semi-improved and neutral) habitats are assumed to have baseline values of 5kg/N/ha/yr and 13kg/N/ha/yr respectively. Developed land, bare ground, hard standing, amenity grassland and gardens are assumed to have a leaching rate of 14.3kg/N/ha/yr (urban land)
- Post development leaching rate of 5kg/N/ha/yr for SANG/SNG/informal open space
- Post development leaching rate of 26.9kg/N/ha/yr for allotments

6.25 The analysis that follows reviews two nitrogen calculations:

- Box 2 generates a nitrogen budget using the assumptions and population estimate generated by Natural Englands nitrogen calculator. This assumes 6000 residential units plus additional residency relevant to the hotel.
- Box 3 uses the population referred to within the Environmental Statement (a larger figure) to stress test the conclusions derived in Box 2. This was undertaken as the population referred to in the ES is larger than the total population figure derived from using the recommended occupancy rates in the Natural England calculator. The output of Box 3 is more conservative as the calculation assumes a larger population figure meaning that the nitrogen budget is more precautionary.

Results of nitrogen balance calculations

6.26 Box 2, below, sets out an assessment of the nitrogen budget of the Welborne proposals based on the population figure derived from using the occupancy rates from Natural Englands calculator.

Box 2: Welborne nitrogen calculation using Natural England calculator		
Stage 1	Calculate total Nitrogen in kg per year derived from the development that would exit the Wastewater Treatment Works (WwTW) into Solent catchments after treatment	
Step 1	Calculate additional population	
	Enter the number of units proposed	6019
	Net population increase per housing unit	2.40
	Total net population increase generated by the development	14,445.60
Step 2	Calculate wastewater volume generated by the development	
	Water use in litres per person per day	110
	Total wastewater volume generated by the development (litres per day)	1,589,016
Step 3	Confirm receiving WwTW and permit limit	
	Select the wastewater treatment works the development will connect to	Peel Common
	Wastewater treatment works' permit limit (mg per litre)	9.0
	Wastewater treatment works' discharge level (mg per litre)	8.1
Step 4	Calculate total nitrogen in kg per year discharged by the WwTW	
	Deduct acceptable Nitrogen loading in wastewater (mg per litre)	6.1
	Total Nitrogen discharged by WwTW (mg per day)	9,692,997.6
	Total Nitrogen discharged by WwTW (kg per day)	9,6930
	Total Nitrogen discharged by WwTW (kg per year)	3,537.9

Stage 2 Calculate existing (pre-development) nitrogen from current land use of the development site	
Step 1 Total area of development site	
Enter the total area of the development site (hectares)	376.90
Step 2 Identify current land uses of the development site	
Enter area currently used for urban development (hectares)	27.15
Enter area currently used for open space / greenfield (hectares)	26.18
Enter area currently used for woodland (hectares)	20.48
Enter area currently used for community food growing / catchment average (hectares)	0.00
Enter area currently used for cereals (hectares)	281.10
Enter area currently used for dairy (hectares)	0.00
Enter area currently used for general cropping (hectares)	0.00
Enter area currently used for horticulture (hectares)	0.00
Enter area currently used for pig farming (hectares)	0.00
Enter area currently used for lowland grazing (hectares)	21.94
Enter area currently used for mixed farming (hectares)	0.00
Enter area currently used for poultry farming (hectares)	0.00
<i>Check to help ensure that sum total of land uses in Step 2 equals site area in Step 1</i>	376.9
Step 3 Calculate nitrogen load from current land usage	
<i>Total Nitrogen load from current land usage (kg per year)</i>	9,677.1
Stage 3 Calculate nitrogen load for the non-built land uses proposed for the development site	
Step 1 Identify proposed land uses of the development site	
Enter the total urban area to be created (hectares)	316.30
Enter the total designated open space / SANG area to be created (hectares)	58.50
Enter the total nature reserve area to be created (hectares)	0.00
Enter the total woodland area to be created (hectares)	0.00
Enter the total community orchard area to be created (hectares)	0.00
Enter the total community food growing / allotment area to be created (hectares)	2.10
<i>Check to help ensure that sum total of proposed land uses equals site area in Stage 2</i>	376.90
Step 2 Calculate total Nitrogen load from proposed land uses	
<i>Total Nitrogen load from future land uses (kg per year)</i>	4,872.08
Stage 4 Calculate the net change in Nitrogen load from the proposed development	
Step 1 Identify Nitrogen load from wastewater (Stage 1)	
<i>Nitrogen leaving wastewater treatment works (kg per year)</i>	3,537.94
Step 2 Calculate net change in Nitrogen load from land use changes	
<i>Total Nitrogen load from future land use (kg per year)</i>	-4,805.01
Step 3 Calculate total Nitrogen budget for the development site	
<i>Nitrogen budget for the site (kg per year)</i>	-1,267.06
Step 4 Calculate precautionary buffer if Nitrogen budget exceeds zero	
<i>Precautionary Nitrogen buffer (kg per year)</i>	0.00
Total Nitrogen budget for the proposed development (kg per year)	-1267.1
Development will be Nitrogen neutral - no mitigation will be required	

6.27 This calculation shows that the Welborne proposals are better than nitrogen neutral, and will result in an overall decrease in the nitrogen inputs into the Solent when compared to the current baseline. This conclusion is based on the most up to date guidance from Natural England.

6.28 The conclusion has been subject to a stress test through use of the population figure of 14796 (plus 45 hotel guests), the population figure used within the

Environmental Statement for purposes of assessing the environmental impact of Welborne. This increases the assumed population from 14445 generated by the working assumptions in the Natural England model. The higher population figure results in an additional 97kg/N/yr generated by the development (see Box 3), but the model demonstrates that even with the larger population estimate, the overall conclusion is the same i.e. Welborne will result in a substantial reduction in nitrogen entering the European sites along the Solent. This will result in an improvement from the current baseline.

6.29 As with the calculations for Box 2 the number of units used in the nitrogen calculator below is higher than the number specified in the application. Again, this is to allow the additional population and hotel occupants to be factored into the calculations (441 additional people equates to 184 additional units at 2.4 people per unit)

6.30 Box 3, below and on the following page, sets out the relevant calculations.

Box 3: Welborne nitrogen calculation using Natural England calculator adjusted to allow for the population figure used in the Environmental Statement

Stage 1	Calculate total Nitrogen in kg per year derived from the development that would exit the Wastewater Treatment Works (WwTW) into Solent catchments after treatment	
Step 1	Calculate additional population	
	Enter the number of units proposed	6184
	Net population increase per housing unit	2.40
	<i>Total net population increase generated by the development</i>	14,841.60
Step 2	Calculate wastewater volume generated by the development	
	Water use in litres per person per day	110
	<i>Total wastewater volume generated by the development (litres per day)</i>	1,632,576
Step 3	Confirm receiving WwTW and permit limit	
	Select the wastewater treatment works the development will connect to	Peel Common
	<i>Wastewater treatment works' permit limit (mg per litre)</i>	9.0
	<i>Wastewater treatment works' discharge level (mg per litre)</i>	8.1
Step 4	Calculate total nitrogen in kg per year discharged by the WwTW	
	<i>Deduct acceptable Nitrogen loading in wastewater (mg per litre)</i>	6.1
	<i>Total Nitrogen discharged by WwTW (mg per day)</i>	9,958,713.6
	<i>Total Nitrogen discharged by WwTW (kg per day)</i>	9.9587
	<i>Total Nitrogen discharged by WwTW (kg per year)</i>	3,634.9

Stage 2	Calculate existing (pre-development) nitrogen from current land use of the development site	
Step 1	Total area of development site	
	Enter the total area of the development site (hectares)	376.90
Step 2	Identify current land uses of the development site	
	Enter area currently used for urban development (hectares)	27.15
	Enter area currently used for open space / greenfield (hectares)	26.18
	Enter area currently used for woodland (hectares)	20.48
	Enter area currently used for community food growing / catchment average (hectares)	0.00
	Enter area currently used for cereals (hectares)	281.10
	Enter area currently used for dairy (hectares)	0.00
	Enter area currently used for general cropping (hectares)	0.00
	Enter area currently used for horticulture (hectares)	0.00
	Enter area currently used for pig farming (hectares)	0.00
	Enter area currently used for lowland grazing (hectares)	21.94
	Enter area currently used for mixed farming (hectares)	0.00
	Enter area currently used for poultry farming (hectares)	0.00
	<i>Check to help ensure that sum total of land uses in Step 2 equals site area in Step 1</i>	376.9
Step 3	Calculate nitrogen load from current land usage	
	<i>Total Nitrogen load from current land usage (kg per year)</i>	9,677.1
Stage 3	Calculate nitrogen load for the non-built land uses proposed for the development site	
Step 1	Identify proposed land uses of the development site	
	Enter the total urban area to be created (hectares)	316.30
	Enter the total designated open space / SANG area to be created (hectares)	58.50
	Enter the total nature reserve area to be created (hectares)	0.00
	Enter the total woodland area to be created (hectares)	0.00
	Enter the total community orchard area to be created (hectares)	0.00
	Enter the total community food growing / allotment area to be created (hectares)	2.10
	<i>Check to help ensure that sum total of proposed land uses equals site area in Stage 2</i>	376.90
Step 2	Calculate total Nitrogen load from proposed land uses	
	<i>Total Nitrogen load from future land uses (kg per year)</i>	4,872.08
Stage 4	Calculate the net change in Nitrogen load from the proposed development	
Step 1	Identify Nitrogen load from wastewater (Stage 1)	
	<i>Nitrogen leaving wastewater treatment works (kg per year)</i>	3,634.93
Step 2	Calculate net change in Nitrogen load from land use changes	
	<i>Total Nitrogen load from future land use (kg per year)</i>	-4,805.01
Step 3	Calculate total Nitrogen budget for the development site	
	<i>Nitrogen budget for the site (kg per year)</i>	-1,170.07
Step 4	Calculate precautionary buffer if Nitrogen budget exceeds zero	
	<i>Precautionary Nitrogen buffer (kg per year)</i>	0.00
Total Nitrogen budget for the proposed development (kg per year)		-1170.1
Development will be Nitrogen neutral - no mitigation will be required		

Analysis

- 6.31 The modelling work using the latest Solent methodology shows that the Welborne development will result in a reduction in nitrogen entering the European sites along the Solent. This conclusion also holds for the larger population estimate on which the Environmental Impact Assessment is based. The pre-construction rates of nitrogen leaching do not account for

the woodland, scrub, hedgerow, grassland and other habitats lost. These areas have been included in the post-development calculations where an urban leaching rate has been used and is precautionary. If the pre-construction leaching rates for these habitats were included in the calculations they would only increase the level of baseline nitrogen leaching and result in a larger reduction in nitrogen entering the Solent European sites post development. The overall conclusion would therefore show an even greater level of benefit.

- 6.32 On this basis, it is concluded that the Welborne proposal will not increase nitrogen levels in Solent waters and cannot therefore adversely affect the interest features for which the SSW SPA, PH SPA, SM SAC & S&DC SPA are classified. Alone therefore, the scheme will not implicate or compromise the conservation objectives of the European nature conservation sites of the Solent and will not adversely affect their integrity. From this it follows that if the Welborne proposals do not adversely affect the integrity of the European sites as an individual project, they cannot act in combination with others. Further in combination assessment is not therefore required.
- 6.33 Under the scenario assessed, all waste water from Welborne will be treated at Peel Common. The proposed develop will achieve better than nitrogen neutrality without the need for additional mitigation measures.
- 6.34 There remains a possibility that the WWTW at Knowle could be upgraded to treat waste water from Welborne. Due to the present uncertainty about this option it has not been assessed. Any changes to the assumptions regarding treatment of waste water used in this paper will require reconsultation with Natural England and will be controlled through a planning condition.

7.0 Conclusion

- 7.1 Having concluded that the application is likely to have a significant effect in the absence of avoidance and mitigation measures on the SSW SPA & PH SPA, SM SAC & S&DC SPA this document sets out a Shadow Appropriate Assessment of the Welborne proposals, in accordance with Regulation 63 of the Conservation of Habitats and Species Regulations 2017.
- 7.2 This shadow appropriate assessment has concluded that the likely significant effects arising from the proposal are consistent with, and inclusive of the impacts detailed in all relevant policy documents and that the proposal is compliant with the necessary measures to prevent adverse impacts on site integrity detailed within the:
- Welborne Plan
 - Solent Recreational Mitigation Strategy
 - Advice on achieving nutrient neutrality for new development in the Solent region, and
 - as agreed with Natural England.
- 7.3 These documents and mitigation measures are supported by an extensive and well-tested evidence base, which has been scrutinised at various levels through planning inquiry, public consultation and is supported by the HRA prepared for the Welborne Plan²³. All necessary mitigation measures can be secured through the S106 and condition.
- 7.4 This shadow appropriate assessment is also relevant to consideration of the impact of the proposals on the corresponding Ramsar sites and potential Special Protection Areas as a matter of Government policy, as set out in the NPPF 2019²⁴.
- 7.5 On this basis, it is concluded that the Welborne proposals will not have an adverse effect on the integrity of the designated sites identified above, either alone or in combination with other plans and projects.
- 7.6 As Competent Authority, FBC must undertake it's own independent appropriate assessment. It may adopt this document as the Council's own following professional and independent scrutiny to confirm the findings of this analysis herein presented.

²³ Urban Edge Environmental Consulting, 2014. Habitats Regulations Assessment for the Welborne Plan. For Fareham Borough Council.

²⁴ Ministry of Housing, Communities and Local Government, 2019. National Planning Policy Framework.

Appendix 1
Relationship of Welborne proposals
to International nature conservation sites

Legend

-  Ramsar Site
-  Special Area of Conservation (SAC)
-  Special Protection Area (SPA)
-  5km Desk Study Search Area
-  Site Boundary
-  Land in control of applicant but not included in the planning application
-  Existing woodland and footpath to be retained

DRAFT

Site Grid Reference: 457,149 108,833

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Drawing Ref: **OBUC101/22402/3**

Scale at A3: **1:50,000**

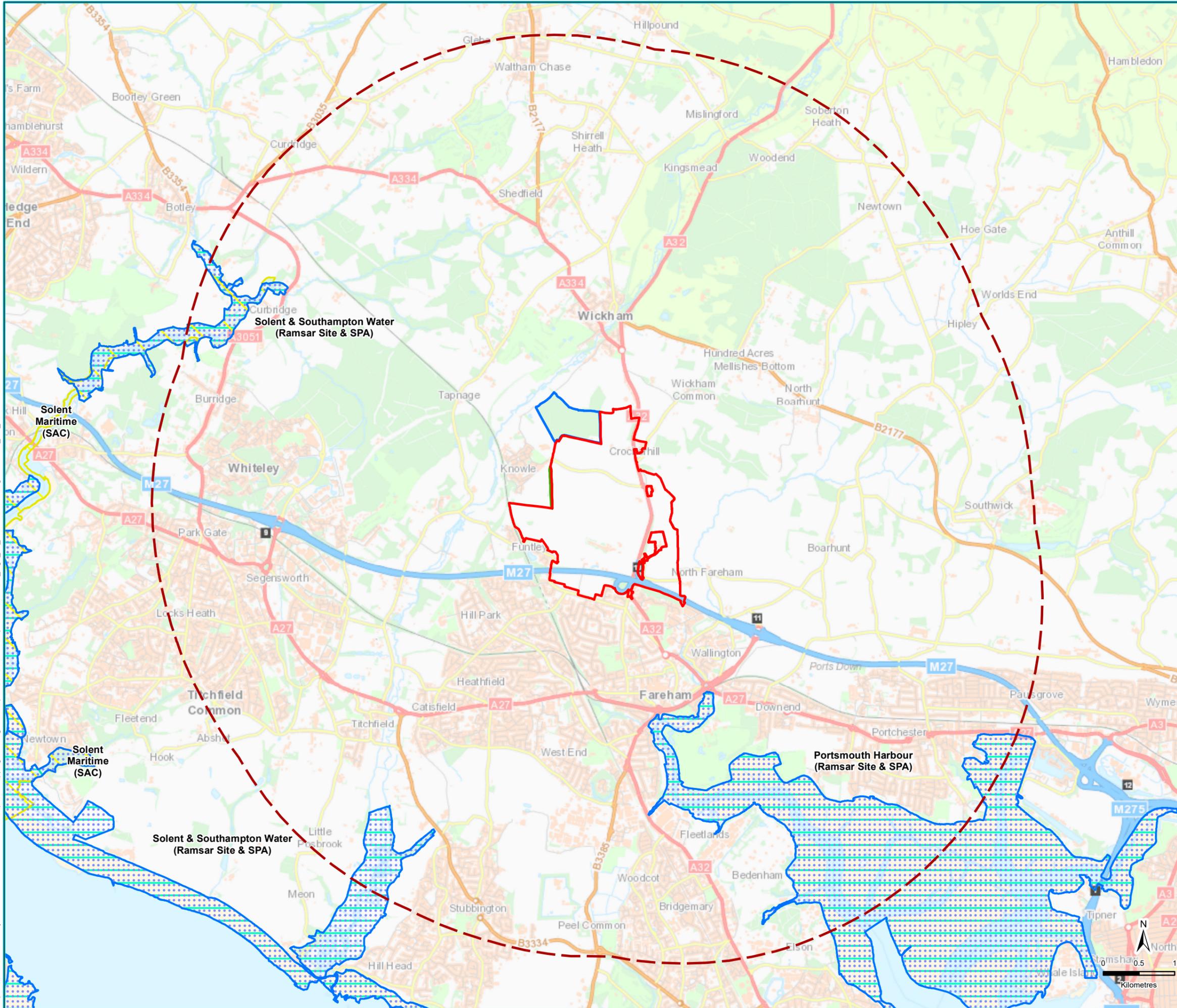
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Date: 29/10/2018	Date: 29/10/2018
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Client: **Buckland Development Ltd**

Figure Number: **9.1a**

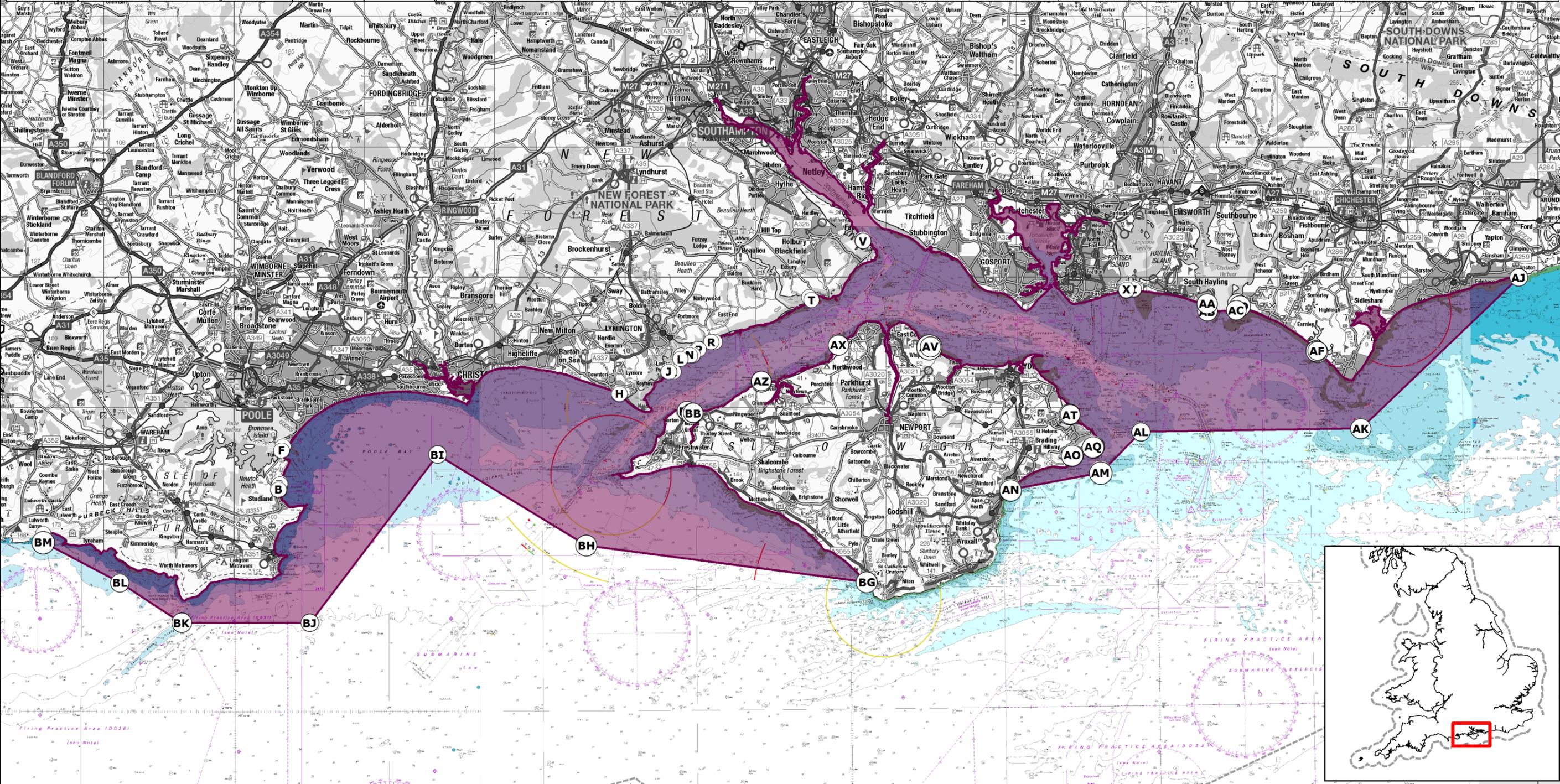
Figure Title: **Designated Sites within 5km of International Importance**



2°15'0"W 2°12'0"W 2°9'0"W 2°6'0"W 2°3'0"W 2°0'0"W 1°57'0"W 1°54'0"W 1°51'0"W 1°48'0"W 1°45'0"W 1°42'0"W 1°39'0"W 1°36'0"W 1°33'0"W 1°30'0"W 1°27'0"W 1°24'0"W 1°21'0"W 1°18'0"W 1°15'0"W 1°12'0"W 1°9'0"W 1°6'0"W 1°3'0"W 1°0'0"W 0°57'0"W 0°54'0"W 0°51'0"W 0°48'0"W 0°45'0"W 0°42'0"W 0°39'0"W 0°36'0"W 0°33'0"W

Point Letter	Lat	Long																		
A	50° 37.329' N	2° 12.500' W	K	50° 44.163' N	1° 31.448' W	U	50° 47.034' N	1° 22.565' W	AE	50° 46.596' N	0° 54.627' W	AO	50° 40.410' N	1° 5.495' W	AY	50° 45.080' N	1° 20.690' W	BI	50° 40.617' N	1° 46.828' W
B	50° 39.206' N	1° 57.181' W	L	50° 44.526' N	1° 30.981' W	V	50° 49.343' N	1° 18.995' W	AF	50° 44.576' N	0° 49.447' W	AP	50° 40.408' N	1° 5.411' W	AZ	50° 43.589' N	1° 25.724' W	BJ	50° 33.667' N	1° 55.167' W
C	50° 39.205' N	1° 57.158' W	M	50° 44.669' N	1° 30.568' W	W	50° 49.387' N	1° 19.025' W	AG	50° 44.562' N	0° 49.468' W	AQ	50° 40.747' N	1° 4.144' W	BA	50° 43.568' N	1° 25.710' W	BK	50° 33.667' N	2° 3.500' W
D	50° 39.424' N	1° 57.110' W	N	50° 44.702' N	1° 30.391' W	X	50° 47.244' N	1° 1.826' W	AH	50° 44.523' N	0° 49.390' W	AR	50° 40.750' N	1° 4.052' W	BB	50° 42.284' N	1° 30.194' W	BL	50° 35.333' N	2° 7.500' W
E	50° 39.426' N	1° 57.121' W	O	50° 44.710' N	1° 30.180' W	Y	50° 47.216' N	1° 1.846' W	AI	50° 44.535' N	0° 49.372' W	AS	50° 40.748' N	1° 4.040' W	BC	50° 42.278' N	1° 30.197' W	BM	50° 37.000' N	2° 12.500' W
F	50° 40.820' N	1° 56.990' W	P	50° 44.920' N	1° 29.806' W	Z	50° 47.243' N	1° 1.367' W	AJ	50° 47.463' N	0° 36.229' W	AT	50° 42.069' N	1° 5.610' W	BD	50° 42.269' N	1° 30.244' W			
G	50° 40.979' N	1° 56.915' W	Q	50° 44.952' N	1° 29.614' W	AA	50° 46.603' N	0° 56.572' W	AK	50° 41.333' N	0° 46.667' W	AU	50° 42.082' N	1° 5.624' W	BE	50° 42.383' N	1° 30.597' W			
H	50° 43.124' N	1° 34.973' W	R	50° 45.218' N	1° 28.975' W	AB	50° 46.267' N	0° 56.562' W	AL	50° 41.333' N	1° 1.000' W	AV	50° 44.964' N	1° 14.655' W	BF	50° 42.375' N	1° 30.599' W			
I	50° 43.117' N	1° 34.982' W	S	50° 45.219' N	1° 28.738' W	AC	50° 46.303' N	0° 54.684' W	AM	50° 39.667' N	1° 3.667' W	AW	50° 44.932' N	1° 14.720' W	BG	50° 35.234' N	1° 18.939' W			
J	50° 44.026' N	1° 31.758' W	T	50° 46.932' N	1° 22.416' W	AD	50° 46.474' N	0° 54.400' W	AN	50° 39.014' N	1° 9.544' W	AX	50° 45.071' N	1° 20.668' W	BH	50° 36.833' N	1° 37.167' W			

Lat / Long coordinates based on GCS_WGS_1984
WKID: 4326 Authority: EPSG
Transformation: OSGB_1936_to_WGS_1984_Petroleum



Potential Marine Special Protection Area
Solent and Dorset Coast
Boundary Map

Map 1 of 1
Note:
The boundary shown is derived from large scale Ordnance Survey MasterMap. The landward extent follows OS MasterMap Mean High Water or Mean Low Water, except between the indicated points, is liable to change and may not match the background detail on this map. Definitive larger scale maps are available on request.

- Potential Marine Special Protection Area
89078.26 Hectares
- Boundary Coordinates
- 12NM Territorial Sea Limit

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0 3.25 6.5 13 Km
0 1.75 3.5 7 NM

EU Site Code: UK999999
Site Version: 20160623
Latitude: 50° 44' 14" N
Longitude: 1° 0' 23" W
Coordinate System: British National Grid
Map Version: 3.0
Plotted: 24/06/2016

Area of Marine SPA: 89078.26 Ha
890.78 sq Km

Scale 1:300,000 at A3

NATURAL ENGLAND

Grid North

Appendix 2
Agreed paper with Natural England:
Dashwood - planning mechanisms to ensure delivery

Project Note

Project: Welborne **Date:** 19th July 2019

Subject: Dashwood: **Update** **Author:** Nicola French

1.0 Background

- 1.1. This briefing note has been prepared to provide information for Fareham Borough Council's assessment of the Welborne proposals under Regulation 63 of the Conservation of Habitats and Species Regulations 2017 (the Habitats Regulations). It addresses the issue of how best to secure Dashwood as part of the Welborne SANG provision given that it lies within the administration of Winchester City Council (WCC) rather than Fareham Borough Council (FBC).
- 1.2. Natural England's response to the Welborne planning application dated 26 May 2017 specifically comments on Dashwood, as follows:

The Welborne Suitable Accessible Natural Greenspace Management Plan (February 2017) is based on the provision of three SANGs - Dashwood, Fareham Common and Welborne Mile, totalling 78.5 ha. The Dashwood SANG is located in Winchester City Council and it is proposed to come forward as a separate planning application. Natural England advises that without prior planning approval and an associated legal agreement, there is currently no security that this land can be provided as a SANG in perpetuity. Natural England will therefore need details of how the delivery of the Dashwood SANG will be secured.

- 1.3. This note sets out Buckland's response to this point and the negotiations with Natural England, FBC & WCC that have taken place since its receipt.

Dashwood planning application

- 1.4. In response to Natural England's point of objection, and in line with the previously agreed planning strategy, Buckland submitted a planning application to WCC in early June 2017 for:

'development to facilitate enhanced public access to Dashwood including the creation of a suitable footpath to allow all weather access, with ancillary wayfinding and interpretation methods including signage, public benches, refuse bins and dog waste bins'

- 1.5. The objective of the application was to ensure that at the point of determination of the Welborne OPA, FBC planning committee has the necessary certainty that SANG infrastructure required within Dashwood, is deliverable and can be secured as part of the overall SANG package.

- 1.6. Following the submission of further information to WCC, this application has now been consented. The additional information established the formal relationship of the Dashwood application to the Welborne OPA and ensured that the two applications properly interfaced and supported each other. They concluded that:
- Habitats Regulations Assessment under the Conservation of Habitats & Species Regulations 2017 is not required for the Dashwood application.
 - The arrangements to ensure that Dashwood is managed as SANG in perpetuity will be secured by Fareham BC through the Welborne S106 and legal agreements with the Land Trust. These arrangements are not relevant to the application for works to enhance public access to Dashwood.
 - To ensure step-in-rights, either:
 - WCC will be a signatory to the Welborne S106, ensuring that the Council has the necessary step-in rights to enforce against the requirements of the Management Plan included as part of the supporting material for the Dashwood application. This sets out the long-term management objectives for the woodland to maintain and improve ecological value alongside increased levels of public access; or,
 - WCC will sign an Inter Authority Agreement with Fareham Borough Council. This will allow FBC, as lead authority, to step-in on WCC's behalf, should the need to exercise step-in rights ever arise.
- 1.7. In addition, negotiations with WCC Ecologist identified opportunity for off-site compensation for the loss of woodland within Dashwood to the proposed footpath. This lies within the OPA for Welborne and will involve new habitat creation and the in-perpetuity conservation management of woodland that is separate from and does not form part of the SANG proposals to secure biodiversity gain. Measures will be secured through two mechanisms:
- conditions to the planning consent granted for the planning application to WCC for infrastructure works (Ref: 17/01607/FUL)
 - inclusion of WCC as signatory to the Welborne S106, to which the works relate.

- 1.8. The decision notice for the Dashwood Planning Application is included as an appendix to this note.

Summary

- 1.9. Since receipt of Natural England's objection to the Welborne OPA, including the requirement to secure the necessary consents within Dashwood, Buckland has worked with WCC, FBC and Natural England to:
- submit an application to WCC for the necessary consents for works in Dashwood
 - establish the relationship between the Dashwood application and the Welborne OPA
 - worked with both Council's and Natural England to resolve issues arising

- secured the necessary planning consent as per the appendix to this document.

1.10. On the basis of this work, Welborne can properly rely on the inclusion of Dashwood within the overall SANG package for provision in perpetuity.



TOWN AND COUNTRY PLANNING ACT 1990 (AS AMENDED)

Grant of Planning Permission

Planning Application Reference: **17/01607/FUL**

Decision Date:- 29.04.2019

Winchester City Council **GRANTS** planning permission for **(ADDITIONAL INFORMATION 31:01:19 ecological impact and clarification on present occupier of site) Development to facilitate enhanced public access to Dashwood including the creation of a suitable footpath to allow all weather access, with ancillary wayfinding and interpretation methods including signage, public benches, refuse bins and dog waste bins at Street Record, Mayles Lane, Knowle, Hampshire, ,** subject to the following conditions:

1 Time Limit

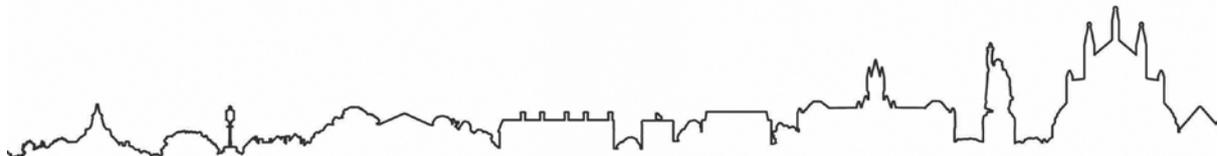
The development hereby permitted shall be commenced before the expiration of five years from the date of this permission.

Reason: To comply with the provisions of section 91(1) of the Town and Country Planning Act 1990 (as amended).

2 Approved Plans

The development hereby permitted shall not be carried out except in complete accordance with the following AECOM approved plans including any details therein, unless specifically covered by another conditions:

- Drawing number LOC-001 revision 1 entitled Location Plan dated 21 April 2017,
- Drawing number SANG-003-FUL revision 11 entitled Masterplan dated 19 November 2018,
- Drawing number SANG-003.2 revision 5 entitled No dig Footpath Proposal dated 1 August 2018,
- Drawing number SANG-003.3 revision 6 entitled Proposed Footpath dated 19 November 2018,
- Drawing number SANG-003.4 revision 3 entitled Dashwood Detailed Layout 1 of 6 dated 12 November 2018,
- Drawing number SANG-003.5 revision 4 entitled Dashwood Detailed Layout 2 of 6 dated 12 November 2018,
- Drawing number SANG-003.6 revision 3 entitled Dashwood Detailed Layout 3 of 6 dated 12 November 2018,



- Drawing number SANG-003.7 revision 3 entitled Dashwood Detailed Layout 4 of 6 dated 12 November 2018

Reason: For the avoidance of doubt.

3 Construction Method Statement

Before the development hereby permitted is first commenced, a Construction Method Statement (CMS) shall be submitted to and approved in writing by the local planning authority. This CMS shall cover the areas identified in paragraph 4.8 of the Dashwood Package of additional information to support application 17/01607/FUL dated December 2018, a timetable for when the work is undertaken and also detail of how the woodland will be accessed and materials moved to the construction locations as well as detailing how the work will be undertaken to minimise the potential impact on the biodiversity of the woodland. The work shall then be undertaken in accordance with the approved details.

Reason: To protect the biodiversity of the woodland during the implementation stage.

4 Restriction on Use Allowed Under the Permitted Development Order

Notwithstanding the provisions of the Town and Country Planning (General Permitted Development (England) Order 2015 (as amended) (or any Order revoking, re-enacting or modifying that Order) no temporary changes of use as allowed under Class B of Part 4 Schedule 2 shall take place within the red lined application site as defined on Drawing number LOC-001 revision 1 entitled Location Plan dated 21 April 2017.

Reason: To ensure that the biodiversity of the woodland is not compromised.

5 Use of Native Species

Any plants used shall be sourced from indigenous stock.

Reason: To maintain and enhance the biodiversity of the woodland.

6 Maintenance of New Planting

If within a period of 5 years from the date of planting of any tree or shrub, that plant, or any replacement for it, is removed, uprooted or destroyed or dies, or becomes in the opinion of the local planning authority seriously damaged or defective, another plant of the same species and size as that originally planted shall be planted at the same place, unless the local planning authority gives its written consent to any variation.

Reason: To ensure that the character and appearance of the surrounding area is maintained.

7 Implementation of Approved Work and Mitigation

The implementation of the development hereby permitted shall be carried out in accordance with the following:

- The footpath hereby permitted shall be constructed in accordance with the approved drawings and with the Path Construction Method as set out in paragraphs 3.6 to 3.10 inclusive within the document entitled Dashwood

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customer.service@winchester.gov.uk

Package of additional information to support application 17/01607/FUL dated December 2018,

- The Site Furniture shall be installed in accordance with the details as set out in paragraph 3.11 to 3.14 inclusive within the document entitled Dashwood Package of additional information to support application 17/01607/FUL dated December 2018,
- The measures as set out in Section 4 Mitigation of Impacts and Table 1 Ecological mitigation & enhancement measures within the document entitled Dashwood Package of additional information to support application 17/01607/FUL dated December 2018 shall be implemented in accordance with a timetable to be submitted to and approved in writing by the local planning authority before any of the development hereby permitted is first commenced.

Reason: To ensure that the woodland is protected.

8 Woodland Management Plan

Before the development hereby permitted is first commenced, a Woodland Management Plan shall be submitted to and approved in writing by the local planning authority. This plan shall use as a basis the issues identified in paragraph 4.9 of the document entitled Dashwood Package of additional information to support application 17/01607/FUL dated December 2018 and set out the measures for the management and maintenance of the footpath, site furniture (including the emptying of the bins), planting, the measures to manage access into the woodland and the timetable for the implementation of these measures. Once implemented, the development shall be undertaken in accordance with the approved Plan.

Reason: To maintain the biodiversity of the woodland.

Julie Pinnock BA (Hons) MTP MRTPI
Head of Development Management

Notes To Accompany Planning Decision Notice

General Notes for Your Information:

- 1 In accordance with paragraphs 186 and 187 of the NPPF Winchester City Council (WCC) take a positive and proactive approach to development proposals focused on solutions. WCC work with applicants/agents in a positive and proactive manner by;
 - offering a pre-application advice service and,
 - updating applicants/agents of any issues that may arise in the processing of their application and where possible suggesting solutions.

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In this instance the applicant was updated of any issues after the site visit and given the opportunity to revise the application and add/clarify any missing details thereby avoiding the need for the submission of details at a later date. The draft conditions have been discussed with the agent/applicant.

2

This permission is granted for the following reasons:

The development is in accordance with the Policies and Proposals of the Development Plan set out below, and other material considerations do not have sufficient weight to justify a refusal of the application. In accordance with Section 38(6) of the Planning and Compulsory Purchase Act 2004, planning permission should therefore be granted.

The Local Planning Authority has taken account of the following development plan policies and proposals and of the following national guidance:-

Winchester District Local Plan Part 1 (Joint Core Strategy)

- Policy SH1 (Development Strategy for South Hampshire Urban Areas)
- Policy SH4 (North Fareham Strategic Development Area)
- Policy MTRA4 (Development in the Countryside)
- Policy CP16 (Biodiversity)
- Policy CP18 (Settlement Gaps)
- Policy CP20 (Heritage and Landscape Character)

Winchester District Local Plan Part 2 (Development Management and Site Allocations)

- Policy DM21 (Contaminated Land)
- Policy DM23 (Rural Character)
- Policy DM24 (Special Trees, Important Hedgerows and Ancient Woodlands)

National Planning Policy Framework

- 8. Promoting Health & Safe Communities
- Open Space & Recreation para 96-101
- 15. Conserving & Enhancing the Natural Environment
- Habitats & Biodiversity
- Ground Conditions & Pollution

Planning Practice Guidance

- Health and Wellbeing
- Land Affected by Contamination
- Natural Environment
- Open Space Sport and Recreational Facilities Public Rights of Way & Open Green Spaces.
- Planning Obligations
- Use of Planning Conditions

Guidance

- Ancient woodland, ancient trees and veteran trees: protecting them from development

3

All building works including demolition, construction and machinery or plant operation should only be carried out between the hours of 0800 and 1800 hrs

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Monday to Friday and 0800 and 1300 hrs Saturday and at no time on Sundays or Bank Holidays. Where allegations of noise from such works are substantiated by the Environmental Health and Housing Department, a Notice limiting the hours of operation under The Control of Pollution Act 1974 may be served.

- 4 European Protected Species Licence pertaining to bats may be required from Natural England prior to the start of development or any preparatory works likely to impact upon them. Failure to secure the licences beforehand may lead to prosecution.
- 5 If the proposals include any work to an ordinary watercourse, under the Land Drainage Act 1991, as amended by the Flood and Water Management Act 2010, prior consent of the Lead Local Flood Authority is required for this work. This consent is required as a separate permission to planning. Details can be found here
<http://www.hants.gov.uk/landplanningandenvironment/environment/flooding/change-watercourse>

Rights of Appeal:

- The applicant or the applicant's representative has the right to appeal to the Secretary of State against any of the conditions applied to this permission under section 78 of the Town and Country Planning Act 1990.
- As this is a decision relating to a Planning Application, any appeal against the conditions must be made within 6 months from the date of this notice.
- If an enforcement notice is served relating to the same or substantially the same land development as in your application and if you want to appeal against your local planning authority's decision on your application, then you must do so within: 28 days of the date of service of the enforcement notice, or within 6 months of the date of this notice, whichever period expires earlier.
- The Secretary of State can allow a longer period for giving notice of an appeal, but will not normally be prepared to use this power unless there are special circumstances which excuse the delay in giving notice of appeal.
- Appeals must be made using a form which you can get from the Secretary of State at:

The Planning Inspectorate (England)
 Temple Quay House
 2 The Square
 Temple Quay
 Bristol
 BS1 6PN

Or online at:

<https://www.gov.uk/government/organisations/planning-inspectorate>

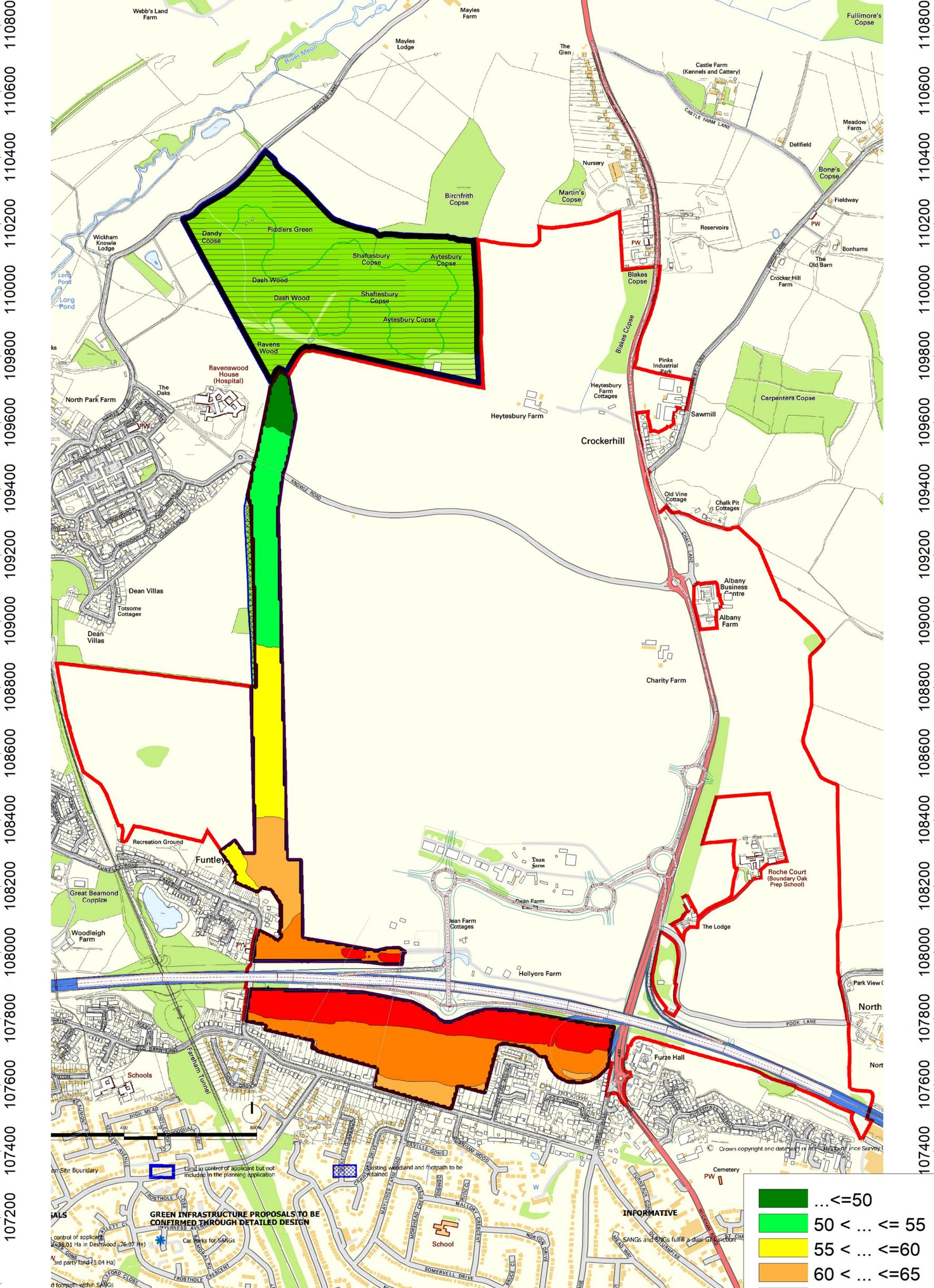


- The Secretary of State need not consider an appeal if it seems to the Secretary of State that the Local Planning Authority could not have granted planning permission for the proposed development or could not have granted it without the conditions they imposed, having regard to the statutory requirements, to the provisions of any development order and to any directions given under a development order.
- In practice, the Secretary of State does not refuse to consider appeals solely because the Local Planning Authority based their decision on a direction given by the Secretary of State.



Appendix 3
Noise modelling:
60dB contour across Welborne SANG

456000 456200 456400 456600 456800 457000 457200 457400 457600 457800 458000 458200



456000 456200 456400 456600 456800 457000 457200 457400 457600 457800 458000 458200

Appendix 4
Natural England SANG guidelines:
Welborne SANG analysis

APPENDIX 5 – SANG CRITERIA ANALYSIS

SANG criteria	Dashwood	Fareham Common	Welborne Mile
Must have			
For all sites larger than 4ha there must be adequate parking for visitors at a rate of 1 parking space per hectare, unless the site is intended for local use, i.e. within easy walking distance (400m) of the developments linked to it. The amount of car parking space should be determined by the anticipated use of the site and reflect the visitor catchment of both the SANG and the SPA.	<p>Dashwood is 38.1ha. Using the Thames Basin Heaths SANG criteria gives it a catchment of c.5km (based on the 'drawing power' of such a large site), easily encompassing the entire Welborne development which is within 2.3km of Dashwood. Dashwood is within easy walking distance (400m) of 1,434 of the dwellings at the Welborne site.</p> <p>Parking will be provided immediately to the south of the wood equivalent to 1 space per hectare i.e. 38 spaces.</p> <p>Footpath/cyclepath access to the wood will be possible from the entire Welborne site and external areas such as North Fareham and Funtley through a network of green routes across the development.</p>	<p>Fareham Common is 15.2ha. Using the Thames Basin Heaths SANG criteria, this has a catchment of c.4km, easily encompassing the entire Welborne development (which is within 2.3km of Fareham Common) and a significant proportion of North Fareham. Fareham Common will be within easy walking distance (400m) of 1,500 dwellings at Funtley and North Fareham and 231 dwellings at Welborne itself. Parking will be provided for this SANG off Funtley Hill equivalent to 1 space per hectare i.e. 22 spaces.</p>	<p>Welborne Mile is 17.1ha, which using the Thames Basin Heaths SANG criteria gives it a catchment of c.4km, easily encompassing the entire Welborne development. Welborne Mile would be within easy walking distance (400m) of 2,205 of the dwellings at the Welborne site.</p> <p>It forms a strong corridor 2km long and 90m wide stretching from the underpass at Funtley Hill linking to Fareham Common beneath the M27, up to Dashwood. This SANG will share the car parks for Dashwood (at the north) and Fareham Common (at the south). Sufficient additional spaces will be provided in each car park to accommodate Welborne Mile i.e. 19 further spaces in total.</p>
It should be possible to complete a circular walk of 2.3-2.5km around the SANG.	<p>A walk of 2.7km can be achieved (without having to repeat sections) within Dashwood alone. The physical, topographical and visual diversity of the woodland structure make it visually appealing across its extent.</p>	<p>Due to the size of the site it has been possible to accommodate a 2.3km circular walk within this parcel alone, without having to have excessive doubling-back.</p>	<p>Since Welborne Mile is 90m wide (similar to many linear parks used by people with dogs off the lead) and 2km long it will be possible for a circular walk of 3.4km to be completed if so desired, without backtracking on the same footpath. It will also be possible (due to the connectivity between Welborne Mile and the other SANG at Fareham Common and Dashwood) to utilise parts of the SANG at either end along with Welborne Mile to create a longer and very elaborate circular walk of over 7-8km, moving through a wide diversity of different habitats. It would also be possible to connect from Welborne Mile to other recreational walking routes to the west north of Funtley or eastwards from Dashwood to the A32 corridor.</p>
Car parks must be easily and safely accessible by car and should be clearly sign posted.	<p>The new car park will meet these criteria.</p>	<p>The new car park will meet these criteria.</p>	<p>Welborne Mile will be served by two car parks, one at the northern end (which will also serve Dashwood) and one at the southern end (which will also serve Fareham Common)</p>
The accessibility of the site must include access points appropriate for the particular visitor use the SANG is intended to cater for.	<p>The design of the Dashwood access has taken account of this requirement, with defined access points in the south-west and south-east corners.</p>	<p>There is an existing right of way beneath the motorway along Funtley Hill that will provide access to Fareham Common from the north of the motorway. The north-south SANG corridor running through the site (Welborne Mile) will also serve to provide a strong connection from the north of the site down to Fareham</p>	<p>The access points are from Dashwood to the north and Fareham Common to the south, connecting into existing Public Rights of Way and Funtley Hill road. There will also be many potential connection points into Welborne Mile from the Welborne development to the east, which are facilitated by the fact that Welborne</p>

SANG criteria	Dashwood	Fareham Common	Welborne Mile
		Common. It will also be possible to make an official entrance to the SANG directly from North Fareham.	Mile stretches for the entire length of the Welborne site.
The SANG must have a safe route of access on foot from the nearest car park and/or footpath/s	This has been achieved, with the car park situated immediately south of the wood.	This is easily possible from North Fareham as the Common directly abuts housing and pavements in that area. The strong north-south corridor (and the existing footpath beneath the M27 along Funtley Hill) also makes this possible for residents of Welborne itself. A pedestrian crossing of Kiln Road will be sought in order to improve accessibility from North Fareham.	Welborne Mile will be accessed on foot directly from Dashwood or Fareham Common (via Funtley Hill) without crossing any roads at grade. Due to its linear nature there are also many opportunities for easy safe pedestrian access from the Welborne development to the east.
All SANG with car parks must have a circular walk which starts and finishes at the car park.	This has been achieved as demonstrated in the Dashwood SANG Masterplan (see SANG Management Plan)	This has been achieved as demonstrated in the Fareham Common SANG Masterplan (see SANG Management Plan)	This has been achieved as demonstrated in the Welborne Mile SANG Masterplan (see SANG Management Plan)
SANG must be designed so that they are perceived to be safe by users.	The wood is open and without obscuring scrub and ground vegetation; it does not have an 'oppressive' feel. It will be well managed to facilitate and encourage public access and there is no reason why it should not be perceived as safe.	The site will be open, without obscuring dense vegetation away from the motorway embankment.	Due to the width of Welborne Mile (90m) there will be no concern with it being oppressive or shadowed and there is no reason for users to not perceive this site as safe.
Paths must be easily used and well maintained but most should remain unsurfaced to avoid the site becoming too urban in feel.	Provision has been made for the circular route to be surfaced in areas to minimise ecological damage, but for the most part, the footpath will remain unsurfaced to minimise impact on the ecology of the woodland. Monitoring will indicate whether further surfacing is needed when use of the woodlands increases.	All paths have been designed so that they meet this criterion.	All paths have been designed so that they meet this criterion.
SANG must be perceived as semi-natural spaces with little intrusion of artificial structures, except in the immediate vicinity of car parks. Visually-sensitive way-markers and some benches are acceptable.	The woodland will meet these requirements, offering an established, mature woodland context for users to access.	No artificial structures within Fareham Common are proposed. Vegetative planting will screen the new road junction north of Fareham Common from the rest of the SANG.	No artificial structures within Welborne Mile are proposed. A sensitive planting and infrastructure design of the Welborne Mile takes into account the adjacent housing.
All SANG larger than 12 ha must aim to provide a variety of habitats for users to experience.	The wood presents a range of topographical and visual interest features with the different types of woodland already present providing an interesting visitor experience. The SANG proposals incorporate a more diverse range of habitats into the wood, particularly areas of non-native conifer plantation within the wood which will be partially removed to create more open space for native planting and seedbank regeneration. This is discussed further in the SANG Management Plan.	This SANG has been designed to provide a variety of habitat experience, from open grassland to scrub mosaics (refer to the Fareham Common SANG Masterplan in the SANG Management Plan).	This SANG has been designed to provide such variety (refer to the Welborne Mile SANG Masterplans in the SANG Management Plan).
Access within the SANG must be largely unrestricted with plenty of space provided where it is possible for dogs to exercise freely and safely off lead.	Access within the wood will be unrestricted. Dogs will be permitted off the lead.	Access to Fareham Common will be unrestricted with safe fencing to protect users from the motorway. Dogs will be permitted off lead.	Access will be entirely unrestricted except at two road crossings (neither of them major roads) which would be spread out over a 2km distance. The design offers plenty of space for dogs to be safely off

SANG criteria	Dashwood	Fareham Common	Welborne Mile
			the lead given the 90m typical width and the absence of main roads adjacent to or bisecting Welborne Mile.
SANG must be free from unpleasant intrusions (e.g. sewage treatment works smells etc.).	There will be no unpleasant intrusions	There will be no unpleasant intrusions, although the value of the land as SANG has been discounted to allow for motorway noise.	There will be no unpleasant intrusions, although the value of the southern end of Welborne Mile as SANG has been discounted to allow for motorway noise. The layout and orientation of housing along Welborne Mile, coupled with the large width of the corridor would avoid a sense of urban encroachment. Also, there would only be two road crossings over a 2km distance.
Should have			
SANG should be clearly sign-posted or advertised in some way.	Sign-posting will be provided in Dashwood to improve legibility. The wood will be promoted as part of the recreational resource available to Welborne residents.	Sign-posting will be provided in Fareham Common to improve legibility. The wood will be promoted as part of the recreational resource available to Welborne residents.	Sign-posting will be provided in Welborne Mile to improve legibility. The wood will be promoted as part of the recreational resource available to Welborne residents.
SANG should have leaflets and/or websites advertising their location to potential users. It would be desirable for leaflets to be distributed to new homes in the area and be made available at entrance points and car parks.	Resident Welcome Packs will include information about the SANG resource available, so that new residents are fully informed.	Resident Welcome Packs will include information about the SANG resource available, so that new residents are fully informed.	Resident Welcome Packs will include information about the SANG resource available, so that new residents are fully informed.
Desirable			
It would be desirable for an owner to be able to take dogs from the car park to the SANG safely off the lead.	This will be possible due to the close positioning of the car park to the wood.	This will be possible.	This will be possible.
Where possible it is desirable to choose sites with a gently undulating topography for SANG	The wood meets this requirement; the topography is not uniform. Broadly the site is of a flat nature, with a few localised areas of steeper ground, although not sufficient to be a deterrent.	The site is on a gentle slope down to the M27.	The entire Welborne site has a gently sloping topography from the highest point at Dashwood to the lowest point at the M27.
It is desirable for access points to have signage outlining the layout of the SANG and the routes available to visitors.	This will be achieved as shown using map boards at the main entrance points to Dashwood.	This will be achieved as shown using map boards at the main entrance points to Fareham Common.	This will be achieved as shown using map boards at the main entrance points to Welborne Mile.



WELBORNE GARDEN VILLAGE

VIABILITY REVIEW

October 2019



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Legal Disclaimer

It should be noted that the advice contained within this report does not constitute a formal Red Book Valuation in accordance with the RICS Valuation Standards 2014. The information within this report is provided as general information and initial recommendations only. Although high standards have been used in the preparation of the information, analysis, views and projections presented in this report, none of the recommendations should be relied upon without further extensive due diligence being undertaken and implemented by you. CBRE confirms that information contained in the report has been obtained from sources believed to be reliable. While CBRE do not doubt their accuracy, we have not verified them and make no guarantee, warranty or representation about them. It is your responsibility to confirm independently their accuracy and completeness. This report does not necessarily represent the view of CBRE in relation to particular properties or projects. Reproduction of this report in whole or in part is not permitted without the prior written consent of CBRE.



EXECUTIVE SUMMARY

CBRE

EXECUTIVE SUMMARY

Overview

CBRE has been instructed by Fareham Borough Council (FBC) to undertake a review of the Site Wide Viability Report (SWVR) produced for Welborne Garden Village by the Master Developer, Buckland Development Limited (BDL).

The key documents informing this assessment of viability are the Site Wide Viability Report February 2017, the Site Wide Viability Report Addendum dated March 2019 and the Supplemental Position Statement dated August 2019.

In addition CBRE has been instructed to review the costs contained with the Infrastructure Delivery Plan (IDP). The IDP has been produced by AECOM on behalf of BDL and contains the cost estimates for the site wide infrastructure which includes allowances for items such as site preparation, transport, utilities and social and green Infrastructure amongst other cost items. The IDP costs amount to £308m.

The SWVR and IDP is provided in support of BDL's outline planning application (P/17/0266/OA) submitted by BDL for a new community of 6,000 new homes, known as Welborne Garden Village. The SWVR concludes, on the grounds of viability, that:-

- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £20m
- Affordable housing for the first 1,000 units should be 10%
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus for the first 1,000 homes

BDL does clearly state that its target is to provide 30% affordable housing and policy compliant levels of Passivhaus and Lifetime Homes however viability does not enable these items to be provided during the initial phase of 1,000 homes. This is principally due to the need to provide circa £105m of site wide infrastructure alongside the delivery of the first 1,000 homes.

Key Welborne Plan Policies – Viability Review Provisions

Policy WEL18 of the Welborne Plan does state that the affordable housing quantum (and tenure split) can be varied on viability grounds however it contains caps and collars whereby each phase must deliver between 10% and 40% affordable housing to achieve the overall target of 30%. The Welborne Plan also envisages lower levels of affordable housing in the earlier phases of the scheme due to the need for significant early provision of site wide infrastructure. Policy WEL17 Lifetime Homes and WEL36 Passivhaus also enable these requirements to be relaxed on viability grounds. CBRE understands that the proposal by BDL is compliant with the requirements of WEL17, WEL18 and WEL36 however this must be confirmed by the Local Planning Authority.

Viability Review Mechanism

A review mechanism has been put forward by BDL to enable viability to be assessed on an iterative basis throughout the life of the scheme with the aim of achieving the full requirements of WEL17, WEL18 and WEL36. Key points to note from the viability review mechanism are:-

- First review to be completed following completion of the 1,000th residential unit and occur at a frequency of 750 unit completions thereafter.
- The review will be in accordance with the agreed financial model and a number of agreed financial parameters. Over time, the actual known costs and revenues will replace the original forecasts.

EXECUTIVE SUMMARY

- In addition to 750 unit phase reviews BDL will provide an annual financial return statement as part of the monitoring arrangement with FBC.
- Any additional grant funding received may trigger a standalone viability review.
- Affordable quantum and tenure, Lifetime Homes and Passivhaus will form part of future viability reviews. FBC will have the ability to adjust and prioritise its requirements in relation to these items should the scheme not be able to afford them all.

M27 Junction 10 Contribution

With regard to the contribution towards the M27 Junction 10 being capped at £20m it should be noted that the total estimated costs of this junction ranges from £80m to £90m. £29m of grant funding towards junction costs has been secured leaving a gap of £31m to £41m.

In addition £10m of Housing Infrastructure Funding (HIF) is being made available by Homes England towards the cost of the junction. However, as this is being provided on a recoverable basis and must be repaid the receipt of HIF does not reduce the potential funding gap.

CBRE Viability Conclusions

CBRE has reviewed the SWVR and benchmarked the assumptions made against market data to ascertain the reasonableness of BDL's assertions. CBRE has also reviewed the inputs and outputs of the BDL financial model which is the key tool for assessing the viability of the scheme. We have also analysed their approach against guidance contained in the National Planning Policy Framework (NPPF) and the National Planning Policy Guidance (NPPG) regarding assessing viability for planning purposes. In addition we have held extensive discussions with the applicant on viability matters having reviewed a number of previous iterations of viability statements and financial models prepared by BDL. In consideration of the information provided by the applicant and CBRE's review of it we concur with the applicant's conclusions that:-

Whole Scheme

- The scheme cannot afford to pay both CIL and £308m of site wide infrastructure costs
- If the BDL contribution towards M27 Junction 10 costs is increased beyond £20m it will adversely affect the viability of the scheme and the ability to meet the various policy requirements including providing 30% affordable housing overall

First 1,000 Units

- The scheme can only afford to provide 10% affordable housing during the delivery of the first 1,000 units
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures on viability grounds
- Lifetime Homes and Passivhaus House requirements for the first 1,000 homes cannot be provided on viability grounds, although some Lifetime Homes may be provided depending on final design and/or potential to deliver it within the affordable housing working in partnership with a Registered Provider.

EXECUTIVE SUMMARY

General

- A review mechanism is utilised going forward enabling the viability of achieving policy targets to be assessed throughout the life of the scheme.
- Sensitivity analysis shows a reasonable prospect of the scheme meeting all policy targets subject to growth projections being achieved, nil CIL and junction contributions being capped at £20m



INTRODUCTION

CBRE

INTRODUCTION

CBRE has been instructed by Fareham Borough Council (FBC) to undertake a review of the Site Wide Viability Report (SWVR) produced for Welborne Garden Village by the Master Developer, Buckland Development Limited (BDL). The key documents informing the assessment of viability are the Site Wide Viability Report dated February 2017, the Site Wide Viability Report Addendum dated March 2019 and the Supplemental Position Statement dated August 2019.

In addition CBRE has been instructed to review the costs contained within the Infrastructure Delivery Plan (IDP). The IDP has been produced by AECOM on behalf of BDL and contains the cost estimates for the site wide infrastructure which includes allowances for items such as site preparation, transport, utilities, social and green infrastructure amongst others. The IDP costs amount to £308m.

The SWVR and IDP is provided in support of BDL's outline planning application (P/17/0266/OA) submitted by BDL for a new community of 6,000 new homes, known as Welborne Garden Village.

Land Ownership

At the time of writing the original SWVR in February 2017 the majority of land required to implement the Welborne Plan was held by two land owners. In September 2017 an associated company of BDL, Welborne Land Ltd, acquired the Dean Farm Estate. This acquisition gave BDL majority control of land required to implement the Welborne Plan.

It is noted that BDL and Welborne Land Limited are owned by the same majority shareholder **however for the purposes of the planning** viability assessment CBRE considers it appropriate to disregard this and carry out the assessment based on the overriding principles of planning viability guidance. As such an appropriate risk adjusted return/profit must be allowed for BDL acting as master developer and the land owner is entitled to receive an appropriate value for its land.

Background

BDL originally produced a viability report in support of the outline planning application which was confidentially submitted to the council in March 2017. The viability report was dated February 2017 and concluded that the site was viable and able to provide a policy compliant level of affordable housing, 30%, subject to: -

- The scheme paying £0 CIL or if CIL was paid it was reinvested back into the scheme
- That any New Homes Bonus (NHB) generated by the development was reinvested back into the scheme – NHB was estimated to generate £30.4m of receipts
- BDL's contribution towards the cost of the new M27 Junction 10 being capped at £20m – which based on cost estimates at that time was considered sufficient to enable the junction to come forward in combination with the £29m of public funding allocated to the junction costs.

Key Changes since 2017

Since the February 2017 viability report was submitted several material changes have occurred which have the potential to impact on viability and these are summarised by BDL as follows: -

- NHB cannot be included within the viability analysis. This has resulted in £30.4m of income being removed from the appraisal

INTRODUCTION

- The Council has confirmed that Welborne is liable to pay CIL which could amount to c.£74m although it is noted that the Welborne Plan envisaged that an update to the CIL policy may be required to enable WGV to be nil rated.
- The costs of junction 10 has increased and current cost estimates range from £80m to £90m. BDL proposes to cap its contribution to the junction works at £20m. Available public funding is £29m resulting in a junction funding deficit of £31m to £41m.
- Housing Infrastructure Funding (HIF) of £10m is being made available by Homes England. However, HIF is being given on a recoverable basis rather than as grant as such it must be repaid and therefore does not contribute towards reducing the junction 10 funding gap.
- In addition to the above the National Planning Policy Framework (NPPF) was introduced in July 2018 which provides the most current guidance on planning viability matters. The information within this has been considered by CBRE to assist in forming our conclusions.

As a result of the changes this has, according to BDL, necessitated an adjustment to the approach of delivering affordable housing requiring a reduction to the initial levels of affordable housing and for this to be made up in subsequent phases. This position was anticipated in the Welborne Plan (paragraph 1.44) which stated that.

“Given the lack of certainty about the future relationship between scheme costs and revenues, the Welborne Plan incorporates a flexible approach which will apply overall to how Welborne will be delivered and in particular to the masterplanning of the site and the infrastructure required. This process has largely been undertaken since publishing the Draft Welborne Plan in early 2013 and has involved extensive engagement with a wide range of interested parties. It includes:

- ***Providing greater masterplanning flexibility to site promoters through adopting the ‘Strategic Framework’ approach, rather than requiring adherence to the Council’s Concept Masterplan;***
- ***Re-considering the timing of infrastructure provision and the scope to utilise existing infrastructure capacity, where available;***
- ***Examining more cost-effective ways to deliver infrastructure;***
- ***A flexible approach to development phasing that would allow for revenue generating development to be commenced earlier; and***
- ***Reducing policy requirements, targets and standards, where they were not essential.”***

Within its SWVR BDL state that importantly, whilst the initial phase of Welborne will provide a lower level of affordable housing, the overall target of 30% affordable housing will remain. The initial levels will be lower to off-set high initial infrastructure costs, removal of New Homes Bonus investment and other rising costs.

The financial viability of the project will be regularly monitored by the Council and their advisors with the aim of making up the initial shortfall in subsequent phases.

BDL also states that Welborne Garden Village is a complex development requiring significant infrastructure to support the creation of the new 6,000 homes mixed use community. The detail and scale of the infrastructure is set out in the Infrastructure Delivery Plan (IDP) and is costed at over £308m.

INTRODUCTION

Over 34% (£105m) of the total £308m IDP will be required to deliver the first 1,000 units (16.6%) which is a significant sum. The Welborne Plan (para 1.41) anticipated this and states the following regarding infrastructure costs and viability:

“Extensive high-level viability evidence has been undertaken during the preparation of the Welborne Plan and this has involved engagement with the site promoters and other key interested parties at various stages. Nevertheless, the balance between the costs of development (including infrastructure provision) and the value that can be created, at a large complex development with a long build-out period, is not possible to accurately determine in advance. As the viability evidence demonstrates, schemes such as Welborne have very significant “up-front” costs relating to key strategic infrastructure provision (such as fully upgrading Junction 10 of the M27 Motorway). Such front-loaded costs can weigh heavily on scheme viability in the early phases. However, as the development progresses and becomes more profitable, it is generally the case that the initial costs can be recouped and the viability of the scheme as a whole maintained.”

Based on its findings BDL concludes that :-

Whole Scheme

- The scheme cannot afford to pay both CIL and £308m of site wide infrastructure costs
- If the BDL contribution towards M27 Junction 10 costs is increased beyond £20m it will adversely affect the viability of the scheme and the ability to meet the various policy requirements including providing 30% affordable housing overall

First 1,000 Units

- The scheme can only afford to provide 10% affordable housing during the delivery of the first 1,000 units
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures on viability grounds
- Lifetime Homes and Passivhaus House requirements for the first 1,000 homes cannot be provided on viability grounds, although some Lifetime Homes may be provided depending on final design and/or potential to deliver it within the affordable housing working in partnership with a Registered Provider

General

- A review mechanism is utilised going forward enabling the viability of achieving policy targets to be assessed throughout the life of the scheme.
- Sensitivity analysis shows a reasonable prospect of the scheme meeting all policy targets subject to growth projections being achieved, nil CIL and junction contributions being capped at £20m
- This report therefore seeks to verify if the assertions put forward by the applicant are valid. In the next section we provide an overview of the scheme and in the following section we outline the methodology adopted by CBRE to review the proposals put forward by the applicant.



APPLICATION OVERVIEW

CBRE

APPLICATION OVERVIEW

The Outline Planning Application that has been submitted is for a residential led mixed use new community to the north of Fareham known as Welborne. The main elements of the application are 6,000 residential dwellings, employment uses, local and community services, supporting infrastructure and improvements to the M27 junction 10. The commercial uses include a number of retail use classes; A1-A5, B1, B8, B2, C1, D1 and D2 together with secondary and primary schools and numerous items of green infrastructure.

Welborne Land Ltd will be the majority land owners of the site and BDL have been actively involved in promoting the site since 2008. BDL also worked in conjunction with FBC to achieve the allocation of the site and the formation of the Welborne Plan which underpins the application and delivery strategy for the site.

In January 2017, DCLG (now MHCLG) announced that Welborne would be one of the first garden villages across England and whilst this has not materially impacted the Welborne Plan, it is an important consideration in the preparation of the application and the determination of the application.

The site covers approximately 377 hectares of largely open countryside and is located to the north of Fareham in Hampshire at the intersection of Junction 10 of the M27 and the A32. The historic village of Wickham lies to the north of the site and a village, Funtley, to the south west of the site and the village, Knowle, to the west of the site. In addition, there is an area of woodland known as Dashwood which is located immediately north west of the site and forms part of the proposed Suitable Alternative Natural Green Space (SANGS).

The site is located within the context of a number of locally important green infrastructure assets including Dashwood, as noted above, and there are also three key routes crossing the site which are the A32, M27 and Knowle Road. The site has some access in the form of public transport via Route 20 on the local bus service, bus rapid transit and Fareham Railway Station. There are also a number of existing public rights of way which cross the site or run parallel to the site boundaries.

The concept of Welborne is to provide a popular place to live, work and visit and the objectives defined by BDL as part of their planning application are:

- Attractive and well planned.
- Distinctive and characterful.
- Vibrant community for all.
- Support healthy living.
- Resilient and sustainable.
- Long term stewardship.

The Welborne Plan forms Part 3 of the Fareham Borough Council Local Plan and follows on from the adopted Fareham Borough Council Local Plan Part 1 (Core Strategy). The Welborne Plan was adopted in June 2015 following an examination by an independently appointed Government Planning Inspector between July 2014 and May 2015. The Welborne Plan captures the essence and principles of the IDP and therefore forms the planning framework for the planning application.



CBRE VIABILITY REVIEW METHODOLOGY

CBRE

CBRE VIABILITY REVIEW METHODOLOGY

The viability review is being undertaken in the context of national Government policy with regard to the NPPF, as well as industry standard benchmarking and the guidance issued by the Royal Institution of Chartered Surveyors and the Local Housing Delivery Group. The key steps we have undertaken are as follows:-

Infrastructure Delivery Plan

BDL has identified circa £308m of site wide infrastructure costs, the cost estimate has been prepared by AECOM on behalf of BDL, and the key cost headings are summarised as follows:-

Item	Description	Cost
Site Preparation	Demolition and site clearance, remediation, archaeology, bulk earthworks	£19.2M
Transport Infrastructure	On site and off site Highways, adoption fees/ commuted sums, bus subsidies and travel plan costs etc	£64.5M
Utility Infrastructure	Electricity and gas, foul and surface water waste and recycling projects	£43.7M
Social Infrastructure	Education, community, health & leisure & recreation facilities	£82.2M
Green	Natural green space, parks and amenity open sports areas/ playing fields and ecological	£31.5M
Professional Fees	Professional fees incurred in the delivery of the	£22.8M
Contingency	Risk allowance included to cover cost overruns	£20.2M
Strategic Costs and fees	Project management, estate management, PR communication, maintenance of unadopted	£24.0M

CBRE's Building Consultancy Department has undertaken a review of the cost plan submitted AECOM. It has benchmarked the cost allowances against published data including SPONS Build Cost Information Service (BCIS) to determine the reasonableness of the cost estimate. concluded that the cost allowances were generally within acceptable market tolerances therefore deemed to be reasonable.

Viability Review

To advise on the reasonableness of the applicant's viability conclusions CBRE has:-

- Reviewed the key Welborne Plan policies affected by BDL's proposal
- Reviewed the overall approach to the assessment of viability applied by BDL

CBRE VIABILITY REVIEW METHODOLOGY

- Benchmarked the cost and values assumptions utilised within the BDL appraisals against market data and industry standards to determine the reasonableness of the approach
- Conducted viability analysis and sensitivity testing
- Reviewed the viability review mechanism proposed by BDL

Our findings are detailed over the next sections of this report.



KEY WELBORNE PLAN POLICIES

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KEY WELBORNE PLAN POLICIES

Below is an overview of the key Welborne Plan policies that are the subject of BDL's viability proposal.

AFFORDABLE HOUSING WEL18

The Council's policy for affordable housing for Welborne is set out in Policy WEL18 of the Welborne Plan. Affordable housing delivery is 'one of the key priorities of the Council and is an important objective for Welborne. Welborne provides a rare opportunity for the Borough to deliver a significant number of affordable homes and to make a real contribution towards addressing the current backlog of housing need'.

Policy WEL18 states that 'Development at Welborne shall provide a total of 30% affordable housing'. It further states that where a residential phase will not meet the 30% target of affordable housing, 'the subsequent phase or phases will be required to meet that shortfall in addition to the 30% target if possible in viability terms'.

The Plan states that new development under the NPPF needs to be deliverable and this means that the overall financial burden on new development, including obligations to deliver affordable housing, should not threaten its economic viability. The Plan notes that 'extensive viability testing has been undertaken on the proposals within this Plan. The outcome of this evidence is that there is potential to deliver a significant proportion of affordable homes, but that an overall target of 30% is likely to be the highest that the development as a whole could reasonably be expected to achieve'.

The Plan notes that delivering the target level of 30% affordable homes annually 'will be a significant challenge given the overall infrastructure burden on the development and the length of time it will take to build the new community. Therefore, it is necessary for the Welborne Plan to consider how a flexible approach to the delivery of affordable homes could be required'.

The flexible approach covers phasing and delivery of affordable homes and allows for a reduced percentage of provision on a phase but with a subsequent rectification preferably later within that same phase or within a subsequent residential phase. The minimum and maximum levels that will be acceptable within any given phase are to be agreed with the Council following viability testing. The Plan states that overall a lower limit of 10% and an upper limit of 40% affordable housing provision per phase would provide 'a reasonable balance between the need for flexibility and achieving the vision and objectives of the Local Plan'.

The initial tenure split for the affordable housing provision is to be 70% affordable or social rent and 30% intermediate tenures. The tenure split is to be kept under review 'phase by phase based on evidence of need and viability'.

POLICY WEL17 - LIFETIME HOMES

Policy WEL17 of the Plan sets out the following requirement in terms of provision for Lifetime Homes.

"Approximately 15% of all market homes within each phase of the development shall be designed to meet higher accessibility standards equivalent to the Lifetime Homes standards. The precise proportions shall reflect evidence of demand at the time the phase comes forward and will be subject to the need to ensure that the phase remains economically viable."

– KEY WELBORNE PLAN POLICIES

POLICY WEL36 – PASSIVHAUS

Policy WEL36 of the Plan sets out the following requirement in terms of providing housing to Passivhaus Standard.

“Planning applications for Welborne shall be supported by an Energy Strategy which demonstrates how the development will:

- i. Optimise energy efficiency by minimising the use of energy through design, layout, orientation, landscaping and materials;
- ii. Achieve high energy efficiency standards for all buildings, including meeting the Passivhaus Standard if appropriate; and
- iii. Secure energy supply, maximising the use of low or zero carbon technologies including district energy networks.

Proposals for residential development shall incorporate 10% of dwellings built to Passivhaus Standard, unless it can be demonstrated to be unviable by means of a financial assessment which clearly demonstrates the maximum proportion of dwellings built to Passivhaus Standard which can be achieved.”

Emerging Conclusions

Based on our review of the key Welborne Plan policies we believe that it is reasonable to vary the proposals on the basis of viability. It will ultimately be the decision of Fareham Borough Council in its statutory function of Local Planning Authority to determine if the proposals put forward by BDL are planning policy compliant.



REVIEW OF BDL VIABILITY APPROACH

CBRE

REVIEW OF VIABILITY APPROACH

BUCKLAND APPROACH TO VIABILITY – MASTER DEVELOPER

BDL has assessed viability on the basis of the master developer approach. The key matters carried out by the master developer are:-

- Acquires land from the landowners
- Provides the site wide strategic infrastructure
- Sells serviced plots to housebuilders to enable the residential and commercial uses to be delivered

Residual Appraisal

With regard to third point above, selling serviced plots to housebuilders, BDL has carried out residual appraisals to estimate how much a developer might pay for a serviced plot. This assumes that the strategic infrastructure is provided by the master developer and the plot developer only has to deliver the residential or commercial uses (which may also include some plot level infrastructure such as non strategic roads and green spaces). The residual appraisal works on the basis of the following:-

Gross Development Value
(Value of the units within the completed scheme)
LESS
Purchaser costs
Equals Net Development Value
LESS
Costs of Delivery
(Including construction, professional fees, finance and developers profit amongst others)
EQUALS
Residual Land Value
(How much a developer pays for a serviced plot)

As such in the course of its viability assessment BDL has made assumptions regarding the costs, revenue and profit incurred by both the master developer and plot level housebuilders. CBRE has reviewed these assumptions and given our opinion as to their reasonableness.

REVIEW OF VIABILITY APPROACH

FIRST 1,000 HOMES VIABILITY VS WHOLE SCHEME

It is noted that BDL has not assessed the viability of the first 1,000 units in isolation. Its approach has been to model scenarios for the whole scheme and make assertions regarding the viability of the first 1,000 homes based on this. CBRE concurs that this is a reasonable approach to take. Viability of strategic sites is particularly challenging during the early years of the scheme given the need to provide significant early infrastructure. To advise on the reasonableness of the BDL assertions for the first 1,000 homes we have analysed the revenue and costs incurred alongside the delivery of the 1,000 homes to assess profitability and potential to achieve policy targets.

BDL's base case i.e. 10% affordable housing, £0 CIL and junction contribution capped at £20m is undertaken on the basis of today's costs and values. As such no allowance has been included for value or cost growth that might occur over the life of the scheme. It subsequently carries out various sensitivity analysis to show how growth could impact on the viability.

CBRE concurs with the approach adopted by BDL and agree that it is prudent to analyse the base case assuming today's costs and values. The growth assumptions have been analysed and benchmarked against available market data to determine their reasonableness too.



MASTER DEVELOPER
APPRAISAL ASSUMPTIONS

CBRE

REVIEW OF VIABILITY ASSUMPTIONS

MASTER DEVELOPER ASSUMPTIONS

In this section we seek to review the assumptions applied by BDL in relation to the master developer.

Land Value

At the time of writing the original SWVR the majority of land required to implement the Welborne Plan was held by two land owners. In September 2017 an associated company of BDL, Welborne Land Ltd, acquired the Dean Farm Estate. This acquisition gave Welborne Land Ltd majority control of land required to implement the Welborne Plan.

BDL and Welborne Land Limited are owned by the same majority shareholder **however for the purposes of the planning** viability assessment CBRE considers it appropriate to disregard the relationship and carry out the assessment based on the overriding principles of planning viability guidance. As such an appropriate risk adjusted return/profit must be allowed for BDL and the land owner is entitled to receive an appropriate value for its land.

BDL has assumed that the agricultural land will be included in the viability assessment at a fixed price of **£100,000 per gross acre**. The only exception to this are existing properties which BDL assumes will be acquired at their market value. The total cost of land acquisition (including fees and stamp duty) is estimated to be circa **£112m**.

Land Payment Profile

Within the BDL appraisal a day one land acquisition allowance of £78m has been included. A significant proportion of this is for the Dean Farm Estate but it also includes a number of interests that BDL believe are required to enable the site wide infrastructure to be delivered. This relatively high day one cost has an adverse impact on scheme viability as finance costs are accrued on this sum from the outset. From a viability perspective it would be preferable if these costs could be cash flowed over the life of the scheme. However the approach taken by BDL reflects their actual assumed expenditure and it would therefore be appropriate to have regard to this when assessing viability. CBRE anticipates that any alterations to the assumed land payment profile will be picked up in the viability review where assumptions are replaced with actual costs and receipts.

With regard to the land value allowance of £100k per acre, in July 2018 the new National Planning Policy Framework (NPPF) was published along with detailed supporting National Planning Policy Guidance (NPPG). In respect of benchmark land value NPPG Paragraph 012 Ref ID 10-013-20180724 advises that:

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

REVIEW OF VIABILITY ASSUMPTIONS

In order to establish benchmark land value, plan makers, landowners, developers, infrastructure and affordable housing providers should engage and provide evidence to inform this iterative and collaborative process". The benchmark land value therefore needs to reflect a price at which the landowner would sell its land and which would need to reflect a premium over existing use value to encourage the landowner to release the land for development as a one-off opportunity.

The factors which should be considered when establishing the benchmark land value are further detailed in new NPPG Paragraph 014 Ref ID 10-014-20180724 and must:

- be based upon existing use value
- allow for a premium to landowners (including equity resulting from those building their own homes)
- reflect the implications of abnormal costs; site-specific infrastructure costs; and professional site fees and
- be informed by market evidence including current uses, costs and values wherever possible. Where recent market evidence is used to inform assessment of benchmark land value this evidence should be based on developments which are compliant with policies, including for affordable housing. Where this evidence is not available plan makers and applicants should identify and evidence any adjustments to reflect the cost of policy compliance. This is so that historic benchmark land values of non-policy compliant developments are not used to inflate values over time.

To confirm the rate of £100k per acre we have compared the BDL land cost figure with reference to greenfield site values in the Local Plan Viability Assessment, May 2017 carried out by Dixon Searle Partnership for Fareham Borough Council. Para 2.11.12 reviews greenfield site values and states

'in our experience of dealing with site specific viability, greenfield land values tend to be assumed at minimum option agreement levels. This is typically between £100,000 to £150,000 per gross acre (i.e. approx. £250,000 – £370,000 per gross hectare) in our experience. Generally, this works back to not less than around £100,000/acre (approx. £250,000/ha) based on net residential (developable) area'.

CBRE also has significant experience of advising strategic sites. For example we have advised Homes England on investments from its HIF fund on circa 15 large strategic sites over the last 12 months. In addition we advise a number of master developers and investors on bringing forward strategic sites and are also retained to dispose of serviced plots to house builders. Examples of this include advising Land Securities on Easton Park (10,000 homes), Crest Nicholson at RAF Wyton (4,750 homes) and Grainger at Wellesley (3,850 homes).

In our experience we are of the opinion that £100k per acre is the minimum price that strategic land is acquired for. We have recent experience of other strategic sites where the option agreements have values of up to £300k per acre. We therefore conclude that the land acquisition price assumed by BDL is reasonable.

REVIEW OF VIABILITY ASSUMPTIONS

Site Wide Infrastructure Costs

The site wide infrastructure costs have been reviewed by CBRE's Building Consultancy Department. It concludes that the cost allowances are reasonable.

Master Developer Profit

The BDL model is showing a master developer's profit on cost of 14.44% and a master developer's Internal Rate of Return (IRR) of 7.3% which equates to a nominal profit of c£78m.

Internal Rate of Return

On strategic sites a key measure of viability is the IRR which should, ideally be, circa 12%+. The IRR reflects the profitability of a scheme over the investment period. For example a project may be viable but it may take several years for the profit to be realised. The IRR enables the impact of time to be explicitly taken into account.

As such it is not unusual for IRR to be the primary benchmark of profitability used by developers of strategic sites and the need to generate a market level IRR can have an adverse impact on the profit on cost calculation. For example a recent scheme CBRE has been involved in the IRR of 13.50% equated to a profit on cost of 30%.

BDL has agreed not to use IRR as a profitability benchmark for assessing the viability of WGV. It proposes using profit on cost metrics instead.

Profit on Cost

BDL's assessment of viability for the whole scheme, with affordable housing at 10%, zero CIL and the junction contribution capped at £20m, produces a profit on cost of 14.4%. BDL has stated that it is willing to proceed with the delivery of the first 1,000 homes on the basis of the scheme showing a 14.4% profit level. However it has stated that it wishes to achieve a 20% profit over the life of the scheme and for this to be taken in account in future viability reviews. A profit of 20% on costs is supported by independent viability guidance and therefore considered to be reasonable.

Finance Costs

BDL has assumed that the master developer finance rate will be 6%. The rate of finance is impacted by a range of factors including amount borrowed, security offered, loan to cost and loan to value ratios, the financial strength of the borrower and the relationship with the lender amongst other matters. The rate applied by BDL is in line with market tolerances. It is noted that there is no explicit allowance for arrangement, non-utilisation or other fees that may be charged by a lender. However the all in rate of 6% is deemed to be reasonable.

Emerging Conclusions – Master Developer Appraisal Assumptions

CBRE is of the opinion that the master developer assumptions applied by BDL with regard to land acquisition, profit, IDP cost and finance rates are reasonable. Indeed the land value and profit assumptions are towards the lower end of the rates prevalent in the market.



PLOT DEVELOPER APPRAISAL ASSUMPTIONS

CBRE

PLOT DEVELOPER APPRAISAL ASSUMPTIONS

RESIDENTIAL SALES VALUES

We have undertaken market research to estimate residential private sales values which have been applied by BDL at an average £350psf. We have considered web-based data related to new build schemes and also sense checked second-hand values within the local area. The sales values to be applied reflect prevailing market conditions and are to be viewed as high level at this stage due to the early stage of delivery of the scheme.

The affordable sales values assume an average value of £148 per sq. ft in respect of the Affordable Rent tenures, and £249.98 per sqft in respect of the Shared Ownership tenures. Against the market units, this equates to c.43% and 71% of values respectively. The rates applied are in line with expected market tolerances as advised by CBRE's affordable housing team.

In conclusion, we do not disagree with the base sales values used by BDL and consider that the assumptions are broadly reasonable.

Sales Rates

In terms of sales rates, BDL has assumed a rate averaging 250 sales per year in the peak delivery period. CBRE consider this projection to be reasonable.

RESIDENTIAL DEVELOPMENT COSTS

Build Cost

BDL has used costs provided by AECOM current at the time of their Site Wide Viability Report. cost allowance was for an 'all-in on plot' basis i.e. a base build cost including prelims and an for costs for 'on-plot' externals (i.e. within the curtilage) to include paths, driveways, plot landscaping. This assumes that residential land parcels are fully serviced to the boundary.

In summary, the costs used by BDL comprise:

Build Cost (£psf)			
Density:	Market Housing	Affordable Rent	Shared Ownership
Low	£132.14	£137.61	£134.38
Medium	£133.12	£137.61	£134.38
High	£137.10	£137.61	£134.38

As the scheme is at such an early stage, there is insufficient detail to prepare a bespoke cost plan. This view has also been taken by BDL, and therefore BCIS data is used to model the cost assumptions in the appraisals. The approach of using BCIS is also supported by the NPPG. Within its SWVR BDL included the extract from BCIS showing where it derived its cost data from. We consider this approach to be reasonable.

No build cost inflation is accounted for within the BDL appraisal, however that is consistent with the lack of house price growth assumed and therefore CBRE support this approach.

PLOT DEVELOPER APPRAISAL ASSUMPTIONS

Other Costs

A summary of other costs used in the residential appraisals (by both CBRE and BDL) are:

- Contingency at 3% of costs
- Professional fees applied at 5% of costs
- Marketing/sales agents – 1.5% of GDV for all tenures
- Sales legal - £750 per unit
- Finance – 5% per annum

Plot Developer's Profit

BDL have assumed a return to a housebuilder 20% of GDV of market housing and 6% to housing. The NPPG advises the following in respect of developers profit that:

"...an assumption of 15-20% of gross development value (GDV) may be considered a suitable developers in order to establish the viability of plan policies. Plan makers may choose to apply alternative figures where there is evidence to support this according to the type, scale and of planned development. A lower figure may be more appropriate in consideration of affordable housing in circumstances where this guarantees an end sale at a known value risk. Alternative figures may also be appropriate for different development types." - Reference ID: 10-018-20180724).

The rates applied by BDL are therefore considered to be reasonable in consideration of the

RESIDUAL LAND VALUE OUTPUTS – RESIDENTIAL SITES

BDL's Residential Land Sales input to the Master Developer Appraisal derives from their analysis of the residual land values for the serviced plots. In total this comprises the sum of £603,299,000 (including the village centres) which equates to an average of £1,362,156 per acre (£3.366m per ha). CBRE considers this to be reasonable based on our analysis of the assumptions utilised and our independent residual analysis.



BDL GROWTH ANALYSIS



BDL GROWTH ANALYSIS

BDL asserts that the development is viable and can deliver policy levels of affordable housing if growth is applied to the financial modelling. CBRE has therefore sought to review the growth assumptions applied by BDL. It is noted that the BDL modelling does not explicitly analyse the ability to deliver the other policy variables i.e. Passivhaus, Lifetime Homes or a 70/30 tenure split as part of the sensitivity analysis however commentary with regard to this is provided by CBRE.

To assess the viability prospects BDL assumes that construction costs could grow at a rate of 2% pa and values at a rate of 3% pa throughout the life of the scheme. BDL concludes that if these growth rates are achieved the 30% affordable housing will be provided. It is noted that this analysis is not undertaken for first 1,000 homes in isolation on the basis that this phase will always struggle to be viable in isolation due to the £105m of infrastructure delivered alongside the first 1,000 homes.

In addition BDL assumes that the affordable housing percentage will grow over the life of the scheme starting at 10% for the first 1,000 homes, 20% for the next 1,000, 30% for the subsequent 1,000 and 40% for the remainder of the scheme. This equates to 30% affordable housing overall and the BDL approach reflects the cap and collar provisions in Policy WEL18 whereby affordable housing should be between 10% and 40% per phase. The results of the BDL growth analysis is below.

BDL Results – 3% Value & 2% Cost Growth	
Gross Development Value	781,373
Costs inc. Finance	-610,312
Profit/Deficit	171,061
Profit/Deficit as % of costs	28%

Whilst BDL does not explicitly model Passivhaus, Lifetime Homes or 70/30 tenure split the outputs of its growth sensitivity analysis show that the scheme will be viable if growth occurs at the rates assumed with this scenario producing a profit on cost of 28%. As BDL requires a 20% profit the 8% above this, which equates to circa £48m, could be used to fund the additional policy requirements enabling the scheme to achieve all policy targets.

Further on in this report CBRE has modelled the scheme utilising BDL's growth assumptions but have included Passivhaus, a 70/30 tenure split and increased affordable housing provision in line with the steps contained within the viability review mechanism i.e. first review at 1,000 units and subsequent reviews at 750 unit intervals thereafter. The BDL model assumes affordable housing is increased at 1,000 unit intervals.

CBRE Review Of BDL Growth Assumptions

CBRE analysis of the viability, detailed in the next section, concurs with the approach applied whereby affordable housing quantum is grown over time. Our analysis that applied 30% from the outset showed the scheme to be unviable given the significant early investment in infrastructure and insufficient revenue being generated to enable finance costs to be repaid expediently. We found that delivering lower levels of affordable in the earlier phases has an impact on the cashflow. Our review of the BDL growth scenarios has therefore sought to the 2%pa cost growth and 3%pa value growth assumptions are reasonable.

BDL GROWTH ANALYSIS

2%pa Cost Growth

CBRE has reviewed cost forecasts published by cost consultants Mace, Gardiner Theobald and Arcadis. These companies are amongst the leading construction firms across the industry and they regularly publish forecast data. Each firm has produced a detailed report outlining the rationale behind their forecasts and the assumptions utilised to reach their conclusions. Below we produce a summary table showing the results of the forecasts – the detailed reports are available to download online.

Company	2019	2020	2021	2022	2023
Mace	1.50%	1.50%	2.50%	3.00%	3.00%
Gardiner Theobald Theobald	1.00%	1.25%	1.50%	1.50%	1.50%
Arcadis	3.00%	3.00%	3.00%	4.00%	4.00%
Average	1.83%	1.92%	2.33%	2.83%	2.83%

It should be noted that the forecasts are only provided for a 5 year period and when compiling their analysis all commentators caveat their outputs due to the currently unknown potential impact of Brexit and the uncertainty this creates when forecasting.

Historical Cost Trends

In addition to reviewing the forecasts CBRE has extrapolated historical data from the BCIS All In Tender In Tender Price Index and the Office for National Statistics (ONS) Construction Output Price Indices. Indices. The BCIS data covers the period from Q4 2005 to Q4 2017 and the ONS data covers the period the period between 2014 and 2018 .

BCIS All In Tender Price Index

The BCIS Cost Index shows cost increasing by 31% over the 12 years from Q4 2005 to Q4 2017 equating to average of 2.57% per annum. The ONS data is contained in the table below.

ONS Construction Output Price Indices

Year	% Change
2014	-3.1%
2015	1.1%
2016	2.4%
2017	2.6%
2018	3.6%
Average	1.3%

CBRE notes that the 2%pa assumption utilised by BDL sits broadly within the range identified by the the industry forecasts and the historic construction cost data collated by BCIS and ONS. BDL's 2%pa 2%pa growth assumption is deemed to be a reasonable assumption for sensitivity analysis purposes.

BDL GROWTH ANALYSIS

3%pa Value Growth

A similar exercise has been undertaken with regard to value growth forecasts. Information has been extrapolated from market reports published by property advisers CBRE, Savills and Jones Lang LaSelle. These firms are amongst the leading real estate advisory firms by market share within the UK and all have produced detailed reports that outline the rationale for their forecasts. The forecast data is summarised in the table below.

	2019	2020	2021	2022	2023
CBRE	1.50%	2.50%	3.50%	4.00%	1.50%
Savills	0.25%	2.75%	2.50%	2.25%	2.75%
Jones Lang	0.50%	1.00%	3.00%	3.50%	3.00%
Average	0.75%	2.08%	3.00%	3.25%	2.42%

As per the construction cost estimate forecasts are only provided for 5 years and all commentators cite the impact of Brexit as having an adverse impact on the ability to forecast. It is generally envisaged that growth will be muted over the next couple of years and will pick up from 2021 onwards.

Historic Value Growth – Land Registry Data

CBRE has reviewed historic average price data collated by the Land Registry for Fareham. In September 2009 the average price of a property in Fareham was **£191,276**. As of July 2019 the average price has increased to **£291,853**. Over this circa 10 year period the average property price has increased by 34% equating to an average of **3.4%** per annum.

The value growth rate of 3% pa applied by BDL is in line with the medium term range identified by the forecasters and is broadly in line with historic Land Registry data. On this basis CBRE considers the BDL value growth assumption to be reasonable.

Emerging Conclusions

The research undertaken by CBRE suggest that the growth rates applied by BDL are reasonable. If the BDL levels of growth can be achieved the scheme will be able to achieve full policy compliance to include 30% affordable housing, 70/30 tenure split, Passivhaus and Lifetime Homes.



**CBRE VIABILITY ANALYSIS
WHOLE SCHEME**

CBRE

CBRE VIABILITY ANALYSIS – WHOLE SCHEME

In this section we summarise the results of the viability analysis that has been undertaken by CBRE. The scenarios modelled by CBRE are outlined below and are for the whole scheme.

It should be noted that all scenarios assume a phased delivery of affordable housing as per the BDL approach i.e. starting at 10% and increasing over time to give an average of 30% overall.

No Growth Scenarios

The scenarios modelled are outlined below and **exclude** cost and value growth.

1. Welborne Plan including CIL payments
2. Welborne Plan excluding CIL payments
3. Welborne Plan including CIL payments; Junction 10 costs capped at £20M
4. Welborne Plan excluding CIL payments, Junction 10 costs capped at £20M

Viability Results

SCENARIO	1	2	3	4
Gross Development Value	475,507	475,507	475,507	475,507
Cost Ex. Finance	(527,171)	(466,585)	(492,171)	(431,585)
Finance	(425,708)	(349,681)	(318,634)	(242,607)
Profit/Deficit	(477,372)	(340,759)	(335,298)	(198,685)
Profit/Deficit as % of costs	(50.1%)	(41.7%)	(41.4%)	(29.5%)

Scenario 1 - Welborne Plan including CIL payments

Key assumptions in this scenario include:-

- 30% affordable housing
- Affordable tenures 70% rented and 30% intermediate
- Passivhaus is included applied to 10% of dwellings
- 15% Lifetime Homes (no explicit allowance for this)
- Scheme pays for junction costs assumed to be £80m for the purpose of this
- CIL is payable

From the viability analysis undertaken, the scheme is not able to support the payment of CIL, affordable housing, Passivhaus requirements and full contributions to the new junction as the generates a loss of circa £480m. The extent of this loss is distorted to an extent by the way in finance costs accrue in loss making schemes – circa £425m of the deficit can be attributed to costs. It should be noted that finance costs in all scenarios that produce a negative return will impacted in a similar way.

CBRE VIABILITY ANALYSIS – WHOLE SCHEME

Scenario 2 – Welborne Plan excluding CIL payments

The loss in this scenario is reduced to £340m but shows that the scheme still is unable to achieve the policy targets even with nil CIL applied.

Scenario 3 – Welborne Plan including CIL payments; Junction 10 costs capped at £20M

The loss in this scenario is reduced to £335m but shows that the scheme still is unable to achieve the policy targets even with the junction contribution capped at £20m.

Scenario 4 – Welborne Plan excluding CIL payments, Junction 10 costs capped at £20M

This scenario produces a loss of £198m which is significantly lower than the deficits in scenarios 1 to 3 however it still shows that the scheme is unable to deliver all policy targets.

Sensitivity Testing On Key Policy Variables

CBRE has also assessed the viability impact of varying the Welborne Plan policy requirements. The scenarios modelled are below and all are benchmarked against CBRE's Welborne Plan compliant scheme, but with no CIL and Junction 10 contributions capped at £20m, and no growth assumed i.e. scenario 4 above:

- Tenure mix 50:50
- Nil Passivhaus
- Affordable Housing at 10% with tenure mix 70/30
- Affordable Housing at 20% with tenure mix 70/30

Lifetime Homes – Assumption Applied For Viability Purposes

According to the Lifetime Homes website to achieve Lifetime Homes there are 16 design criteria that need to be met. This includes design features that increase ease of access such as level thresholds and wider doorways, lit and covered entranceways and good accessibility throughout the home.

The financial impact of Lifetime Homes is difficult to assess from a viability perspective at this stage of the scheme given that detailed design has not been undertaken and assumptions are made regarding the average size of units that will be delivered. It will therefore require the input of architects/design consultants in order for this to be analysed.

The Lifetime Homes website provides a range of indicative costs estimates for achieving compliance ranging from £550 per unit to £1,500 per unit. CBRE notes that these estimates are historic ranging in date from 1997 to 2007. Given the age of the cost information and lack of detailed design CBRE considers it difficult to accurately assess what the impact of Lifetime Homes maybe. We therefore are unable to carry out the analysis including an explicit allowance for Lifetime Homes. Instead we provide commentary on the ability of the scheme to afford additional costs or not.

CBRE VIABILITY ANALYSIS – WHOLE SCHEME

Passivhaus House - Assumption Applied For Viability Purposes

Passivhaus House units provide a high level of sustainability whereby the units use lower levels energy for heating and cooling the properties achieving a circa 75% reduction in space requirements. BDL state that the cost of achieving Passivhaus could add 10% to 30% to the and CBRE's Building Consultancy Department concur that this is a reasonable assumption to high level viability analysis. For the purposes of assessing viability with Passivhaus included assumed a 15% uplift in costs.

Sensitivity Testing Results – Key Policy Variables

	Base Case	Tenure mix 50:50	Nil Passivhaus	10% Affordable Housing	20% Affordable Housing
Gross Development Value	475,507	521,499	489,938	584,114	530,639
Cost Ex. Finance	(431,585)	(431,585)	(431,585)	(431,585)	(431,585)
Finance	(242,607)	(186,356)	(216,947)	(155,668)	(183,426)
Profit/Deficit	(198,685)	(96,443)	(158,595)	(3,140)	(84,372)
Profit/Deficit as % of costs	(29.5%)	(15.6%)	(24.5%)	(0.5%)	(13.7%)
Change v Base Case	n/a	+102,242	+40,090	+195,545	+114,313

The table shows the net impact on profitability as a result of varying the key policy requirements. It should be noted, as per previous comments, that it is the way in which finance costs accrue in loss making scenarios that has the largest impact on viability as shown in the finance row in the table above.

To assess the net impact of varying the policy requirements, pre finance, one may wish to examine/review the Gross Development Value line. This effectively shows the impact on the amount that will be paid for the land by house builders to BDL as a result of the policy change. For example altering the tenure mix from 70/30 to 50/50 for the whole scheme could generate circa £46m of additional revenue. Alternatively removing Passivhaus could generate circa £14m of additional revenue across the whole scheme

Cost/Value Growth & Placemaking

CBRE has conducted further analysis to show the impact on the scheme of cost and value growth. In addition we also seek to assess the impact that placemaking could have on viability. All scenarios in this section are based on the Welborne Plan requirements excluding CIL payments and Junction 10 costs capped at £20m as per scenario 4 on the previous page. The analysis is also undertaken on the basis of affordable housing quantum increasing over the life of the scheme.

Cost and Value Growth

In a previous section we reviewed the BDL 2% pa cost and 3% pa growth assumptions. Based on the information available we concluded that the growth assumptions applied are reasonable but must also state that there is no guarantee that growth will be achieved. Also BDL did not explicitly model Passivhaus, 70/30 tenure split nor increase affordable housing provision as per the intervals within the review mechanism. This scenario showed the scheme generated a profit of 28% on costs and good prospects for all Welborne Plan policy requirements to be delivered if growth occurred in the manner assumed by BDL.

CBRE VIABILITY ANALYSIS – WHOLE SCHEME

CBRE has modelled the scheme utilising BDL's growth assumptions but have included Passivhaus, a 70/30 tenure split and increased affordable housing provision in line with the steps contained within the viability review mechanism i.e. first review at 1,000 units and subsequent reviews at 750 unit intervals thereafter. The BDL model assumes affordable housing is increased at 1,000 unit intervals. The results of this are included in the summary table below.

Placemaking Premium

Through the viability discussions the developer's desire to deliver a high quality scheme was communicated with placemaking a key part of its delivery strategy. CBRE and the RICS in 2016 published a research document entitled "Placemaking and Value". The research found that placemaking does add commercial value, with greater premiums achievable in areas that already have a higher embedded new build value and where schemes contain more than 1,000 units.

Good placemaking techniques in high value areas can secure additional premiums of over 50%. This can be sustained over the long term as the reputation gathers pace. This was evident in large schemes that continued to sell new-build accommodation at a significant premium over a ten-year build period.

Placemaking is effective in lower-value areas too with schemes achieving a c. 20% uplift on local new build competition. Ambitious design committed to innovative architecture, high grade materials and high quality finish all help to drive the premium. Such schemes became aspirational places to live within both the local and broader market. The placemaking premium is one that is likely to be witnessed incrementally, as the development and location evolves rather than at one point in time during the construction programme.

Placemaking and Growth Viability Analysis

CBRE has modelled three scenarios to assess the impact of growth and/or placemaking. The first simply assumes that a 20% premium is achieved by the time the 1,000th home is delivered; the second assumes a 30% premium is achieved by the time the 1000th home is delivered; and the third assumes both a place making premium of 20% and BDL's growth assumptions.

20% and 30% is towards the lower end of the placemaking premium range and considered to be prudent sensitivity assumptions. The results are summarised in the table below and are benchmarked against CBRE's policy compliant scheme (scenario 4).

	Base Case No Growth	3% Value & 2% Cost Growth	20% Placemaking Premium	30% Placemaking Premium	20% Placemaking + 3% & 2%
Gross Development Value	475,507	726,780	567,758	610,435	851,700
Cost (ex. Finance)	(527,171)	(513,679)	(431,585)	(431,585)	(513,679)
Finance Costs	(425,708)	(120,280)	(111,164)	(75,047)	(70,903)
Profit/Deficit	(477,372)	92,822	25,008	103,803	267,119
Profit/Deficit as % of costs	(50.1%)	14.6%	4.6%	20.5%	45.7%

CBRE VIABILITY ANALYSIS – WHOLE SCHEME

The sensitivity analysis shows that the scheme is able to deliver all policy targets subject to achieving either a circa 30% placemaking premium or a combination of a placemaking premium and growth in line with BDL's assumption.

Viability Analysis Emerging Conclusions

The viability analysis undertaken in this section demonstrates that the scheme will not be able to afford all policy requirements on the basis of today's cost and values. It is therefore reasonable to concur with BDL's assumption that the scheme should not be liable to pay CIL and the junction contribution costs should be capped at £20m from a viability perspective.

The growth and placemaking scenarios show much better prospects for achieving the full policy targets and the outputs from this sensitivity testing demonstrate just how sensitive the project financial model is to changes in key assumptions. CBRE therefore considers it prudent to monitor the financial performance of the project as it progresses and for the assumptions to be replaced with actual costs and revenues for future viability reviews.



**CBRE VIABILITY ANALYSIS
FIRST 1,000 UNITS**

CBRE

CBRE VIABILITY ANALYSIS – FIRST 1,000 UNITS

First 1,000 Units Viability

We have sought to assess the viability of the first 1,000 units via analysis of the cashflow. We have estimated the costs and revenues that maybe incurred by BDL during the delivery of the first 1,000 homes.

This scenario is based on BDL's proposal of 10% affordable housing, the junction costs capped at £20m and zero CIL, Passivhaus and Lifetime Homes. The results of this are summarised below

	First 1,000 Homes (£/m)
Gross Development Value	129
Cost	(252)
Profit/Deficit	(123)
Profit/Deficit as % of costs costs	(49%)

Emerging Conclusions – Viability of First 1,000 Units

Phase 1 is loss making due to the **£105m** of infrastructure and **£83m** of land acquisition and other costs, such as finance, incurred whilst the first 1,000 homes are being delivered.

The analysis shows that an alternative approach to delivery is required if the scheme is to achieve all policy targets. As such the approach suggested by BDL whereby 10% affordable housing, 50/50 tenure split, 0% Passivhaus, 0% Lifetime Homes are considered to be reasonable on viability grounds. Even with these metrics applied in the first 1,000 units the viability will be challenging. BDL must therefore deliver future phases in order to realise a profit and this is a relatively normal delivery profile for strategic sites with significant upfront infrastructure costs.

Based on the analysis undertaken CBRE concludes, from a viability perspective, that it is appropriate to vary the proposals from full policy on the grounds of viability for the first 1,000 units.



VIABILITY REVIEW MECHANISM

CBRE

VIABILITY REVIEW MECHANISM

VIABILITY REVIEW MECHANISM

Given that the viability analysis shows that the scheme is unable to afford the policy targets from the outset a review mechanism has been proposed by BDL to enable viability to be assessed on an iterative basis. This enables viability to be assessed throughout the life of the scheme with the aim of achieving the full requirements of WEL17, WEL18 and WEL36. Key points to note from the viability review mechanism are:-

- First review to be completed following completion of the 1,000th residential unit and to occur at a frequency of 750 unit completions thereafter.
- The review will be in accordance with the agreed financial model and a number of agreed financial parameters. Over time, the actual costs and revenues will replace the original forecasts.
- In addition to 750 unit phase reviews BDL will provide an annual financial return statement as part of the monitoring arrangement with FBC providing information on expenditure and revenue.
- Any additional grant funding received may trigger a standalone viability review.
- Affordable quantum and tenure, Lifetime Homes and Passivhaus will form part of future viability reviews. FBC will have the ability to adjust and prioritise its requirements in relation to these items should the scheme not be able to afford them all.
- **Key Variable Inputs:**
 - **Revenue:** Revenue from all sales would be recorded, with the viability cashflow updated to track the ongoing viability of the project, ensuring that there would be regular capturing of any value growth within the appraisal.
 - **Infrastructure Costs:** Within the IDP provided there are a number of items that are subject to optimism bias. Tracking these costs throughout the development will allow greater clarity in relation to the actual costs associated with this development.
 - **Interest Rates:** Buckland allow for the review mechanism to incorporate Bank of England Base Rate + 5.25% subject to the rate used in future reviews be in line with prevailing market rates at the time of review. Given the reference to market rates at the time of review, CBRE believe that there is appropriate protection in place to ensure that at each review, the interest rate can be adjusted accordingly.
- **Key Fixed Inputs:**
 - Land Cost: Fixed at £100,000 per gross acre for each viability review (other than properties which are valued on an existing use value basis). CBRE has confirmed that this is reasonable.
- **Performance / Viability Measure:**
 - Profit on Cost is a widely used measure when assessing real estate development projects. Buckland have provided two targets, one for the first 1,000 units (14.4%), and another to be used as a benchmark at a scheme level assessment (20.0%).

The viability review mechanism has been subject to negotiation with BDL and CBRE considers that the final proposal put forward by BDL is reasonable from a viability perspective.



CONCLUSIONS



CONCLUSIONS

CBRE VIABILITY CONCLUSIONS

CBRE has reviewed the SWVR and benchmarked the assumptions made against market data to ascertain the reasonableness of BDL's approach. CBRE has also reviewed the inputs and outputs of the BDL financial model which underpins their approach to assessing the viability of the scheme. We have also analysed their approach against guidance contained in the NPPF and the NPPG regarding assessing viability for planning purposes. In addition we have held extensive discussions with the applicant on viability matters having reviewed previous iteration viability statements and financial models prepared by BDL. In consideration of the information provided by the applicant and CBRE's review of it we concur with the applicant's conclusions that:-

Whole Scheme

- The scheme cannot afford to pay both CIL and £308m of site wide infrastructure costs.
- If the BDL contribution towards M27 Junction 10 costs is increased beyond £20m it will adversely affect the viability of the scheme and the ability to meet the various policy requirements including providing 30% affordable housing overall.

First 1,000 Units

- The scheme can only afford to provide 10% affordable housing during the delivery of the first 1,000 units.
- The affordable mix for the first 1,000 units is split 50/50 between affordable rent and intermediate tenures on viability grounds
- Lifetime Homes and Passivhaus House requirements for the first 1,000 homes cannot be provided on viability grounds, although some Lifetime Homes may be provided depending on final design and/or potential to deliver it within the affordable housing working in partnership with a Registered Provider.

General

- A review mechanism is utilised going forward enabling the viability of achieving policy targets to be assessed throughout the life of the scheme.
- Sensitivity analysis shows a reasonable prospect of the scheme meeting all policy targets subject to growth projections being achieved, nil CIL and junction contributions being capped at £20m. The prospect of achieving the growth targets cannot be guaranteed and any value or cost growth that may occur will be reflected in the future viability reviews.

WELBORNE – ADDENDUM, OCTOBER 2019.

INTRODUCTION:

CBRE has been instructed by Fareham Borough Council (FBC) to undertake further sensitivity analysis modelling in relation to the growth rates that were included as part of the assessment of viability of the Welborne Garden Village scheme.

Background

A planning application has been submitted by the Master Developer, Buckland Development Limited (BDL), for a new community of 6,000 new homes. In support of the planning application BDL submitted a Site Wide Viability Report (SWVR) which concluded on viability grounds that:

- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £20m
- Affordable housing for the first 1,000 units should be 10%
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus for the first 1,000 homes

CBRE reviewed the viability evidence put forward by BDL and concurred with the points raised above. This Addendum builds on the initial work set out within the Viability Review previously submitted by CBRE.

Growth Analysis

Within its SWVR BDL assumes no growth in its base case which CBRE considers to be reasonable. However, it provides sensitivity analysis that shows the viability of the scheme if growth was to occur. When assessing the growth scenario BDL applies 3% value and 2% cost growth. CBRE reviewed the growth rates applied, benchmarked them against industry data and found them to be reasonable.

The purpose of the Addendum is to financially model the impact of different growth rates for build cost and values and assess the extent to which full policy compliance could be achieved. This will then be used to advise FBC on the level of growth that needs to occur to achieve the delivery of 30% affordable housing, a 70:30 tenure split, and Passivhaus and Lifetime Homes compliance.

In addition to cost and value growth analysis the impact of Placemaking is also financially modelled to demonstrate its impact on how full policy compliance could be achieved.

METHODOLOGY:

The methodology undertaken for the purposes of this Addendum remains consistent with the process applied within the original Viability Review whereby a residual master developer appraisal is undertaken.

The scenarios modelled by CBRE are outlined within the Growth Analysis section and are for the whole scheme. It should be noted that all scenarios assumed a phased delivery of affordable housing i.e. starting at 10% and increasing over time to give an average of 30% overall. The review timing remains consistent with that set out within the Viability Review, and is outlined below:

Review	Affordable Housing Units	Total Units Delivered at Review	Units Subject to Review
1	100	0	1,000
2	150	1,000	750
3	150	1,750	750
4	300	2,500	750
5	300	3,250	750
6	300	4,000	750
7	300	4,750	750
8	200	5,500	500
Scheme Total	1,800	30%	6,000

First 1,000 Units

Within the first 1,000 units of the scenarios analysed the assumptions agreed with BDL during the viability review are applied. Whereby, due to the significant upfront infrastructure requirements:-

- Affordable housing for the first 1,000 units is 10%
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures
- There are no Lifetime Homes or Passivhaus for the first 1,000 homes

Whole Scheme

After the first 1,000 units CBRE has assessed viability based on achieving an average of 30% affordable housing across the scheme. This also assumes a 70:30 tenure split and also Passivhaus requirement fulfilment. As per the Viability Review, the Lifetime Homes requirements have not been financially modelled due to the level of information needed to assess this not being available. Other key assumptions applied to the whole scheme analysis are:

- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £20m

These assumptions were found to be reasonable during the original viability review.

GROWTH ANALYSIS:

In this section CBRE summarise the results of the viability analysis that has been undertaken. FBC have requested sensitivity analysis to be undertaken in respect of growth rates assumed for both the costs and values, using rates of 1% to 4% in respect of each. These growth rates are explicit and do not include the potential impact of

placemaking, which is analysed separately whereby a 20% and 30% placemaking premium is applied. Further scenarios are tested that combine both growth and placemaking.

When reviewing the outputs of the sensitivity analysis the scheme is deemed to be viable where a Profit on Cost figure in excess of 20% is achieved; this is the minimum profit level BDL have proposed for the Review Mechanism and is a rate consistent within viability guidance. Where the metric does not exceed 20% it is assumed that full policy compliance may not be achieved. The tables below therefore show the % profit on cost achieved within each scenario.

No Placemaking Considered

Profit on Cost (%) Sensitivity		Revenue Growth (%per annum)			
		1.00	2.00	3.00	4.00
Cost Growth (%per annum)	1.00	(22.5%)	(0.5%)	25.0%	51.2%
	2.00	(31.8%)	(13.6%)	10.9%	36.8%
	3.00	(39.9%)	(24.9%)	(3.9%)	21.8%
	4.00	(47.1%)	(34.6%)	(17.4%)	6.4%

20% Placemaking Considered

Profit on Cost (%) Sensitivity		Revenue Growth (% per annum)			
		1.00	2.00	3.00	4.00
Cost Growth (% per annum)	1.00	5.7%	30.3%	54.9%	81.2%
	2.00	(8.4%)	16.5%	41.4%	66.4%
	3.00	(20.8%)	1.9%	27.0%	51.9%
	4.00	(31.3%)	(13.0%)	11.6%	36.8%

30% Placemaking Considered

Profit on Cost (%) Sensitivity		Revenue Growth (%per annum)			
		1.00	2.00	3.00	4.00
Cost Growth (%per annum)	1.00	19.4%	43.3%	67.4%	95.6%
	2.00	5.6%	30.0%	53.7%	79.6%
	3.00	(9.2%)	15.6%	40.0%	64.1%
	4.00	(22.0%)	0.2%	25.2%	49.2%

CONCLUSIONS:

The financial modelling undertaken shows just how sensitive residual appraisals are to changes in the underlying assumptions. Whilst the analysis in this note focuses on the impact of varying the growth rates and placemaking premium, residuals are also very sensitive to general changes in costs, values and programme or phasing assumptions.

The sensitivity analysis shows that a combination of value and cost growth is required to achieve full policy compliance. CBRE has undertaken further analysis to assess what level of placemaking premium is needed to achieve full policy compliance when cost and value growth is applied at 2% and 3% respectively (as per BDL’s growth scenario).

This showed that a **6%** placemaking premium is needed in addition to 3%pa value growth and 2%pa cost growth to enable full policy compliance to be achieved. This is based on the assumption that contributions to Junction 10 are capped at £20m, and that CIL is not applied to the development as per the findings of the Viability Review.

It should be noted that large strategic scheme such as Welborne Garden Village, are long term projects, and the viability modelling is very sensitive to what can appear to be small changes in the assumptions. The impact of placemaking analysed within this Addendum demonstrates that it is able to compensate for lower underlying market growth, however as outlined within the Viability Review, certainty cannot be placed on this occurring, due to the vast range of factors that can influence the level of placemaking premium achievable.

The viability review mechanism agreed with BDL is therefore key to enabling the performance of the development to be tracked over time. The forecasts within the financial model will be replaced with the actual costs and revenues. Improvements in viability will be captured and any additional revenue generated, after a 20% profit has been achieved, will go towards the target of achieving full policy compliance.



WELBORNE GARDEN VILLAGE

Planning Viability Review

Addendum Report

January 2021

Welborne Garden Village – Planning Viability Review January 2021

CBRE has been instructed by Fareham Borough Council (FBC) to undertake a review of the updated planning viability statement submitted by Buckland Development Ltd (BDL), dated 17th December 2020, in relation to Welborne Garden Village (WGV).

Reliance

In accordance with PS 1.6 of the RICS Valuation – Professional Standards (January 2014 Edition) (the 'Red Book'), the provisions of VPS 1 to VPS 4 are not of mandatory application and accordingly this report should not be relied upon as a Red Book valuation.

This report is addressed to Fareham Borough Council only and should not be reproduced without our prior consent.

Background

CBRE has previously advised FBC on viability statements prepared by BDL in relation to the viability of WGV. This culminated in the approval of the planning application for WGV in October 2019. CBRE undertook a detailed review of the proposals put forward by BDL in the lead up to the October 2019 planning decision and concluded, on viability grounds, that:-

- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £20m
- Affordable housing for the first 1,000 units should be 10%
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus for the first 1,000 homes

In addition to the above, terms were agreed for a viability review mechanism. The purpose of this was to monitor and review the viability of the scheme over time so that if viability improved it could be possible for the policy requirements to be met either partially or in full. The key terms of the viability review mechanism were as follows:

- First review to be completed following completion of the 1,000th residential unit and occur at a frequency of 750 unit completions thereafter.
- The review will be in accordance with the agreed financial model and a number of agreed financial parameters. Over time, the actual known costs and revenues will replace the original forecasts.
- In addition to 750 unit phase reviews BDL will provide an annual financial return statement as part of the monitoring arrangement with FBC.
- Any additional grant funding received may trigger a standalone viability review.
- Affordable quantum and tenure, Lifetime Homes and Passivhaus will form part of future viability reviews. FBC will have the ability to adjust and prioritise its requirements in relation to these items should the scheme not be able to afford them all.

An important part of the viability position at the time was how the new Junction 10 of the M27 would be funded. The junction must be provided to enable more than 1,160 units to be occupied due to highway constraints. At the point of the planning application determination it was highlighted that there was a funding gap for the estimated £80-90m costs of the Junction scheme. Funding had been allocated as follows:

- £20m developer contribution

- £10m of Housing Infrastructure Funding provided by Homes England, unconfirmed
- £14.15m of Solent Local Growth Deal funding allocated by the LEP
- £14.9m of Solent Growth Deal funding retained by the DfT

Given that all the funding for the junction was not in place, a planning condition was imposed for BDL to revert back with a confirmed junction funding strategy before any development other than the Junction 10 works could commence.

Current Position

The Junction 10 scheme delivery cost is now estimated as in the region of £75m, following the progression of a more cost-effective design.

Of the £14.9m Solent Growth Deal funding retained by DfT, £5.5m has been advanced to progress scheme design. The remaining Solent Growth Deal funding retained by DfT, and the £14.15m locally earmarked Solent Growth Deal funding has been reallocated to other infrastructure projects in the LEP's pipeline that could spend the funding before the end of March 2021.

Discussions with Central Government have resulted in an increase in the offer of Housing Infrastructure Funding (HIF) from £10m to £30m. Discussions on this are progressing at pace and although there is a reasonable prospect of this funding being available for Welborne Garden Village, the funding remains subject to Homes England approval and may require a decision by the Council's Executive.

Even with the scheme costs reducing and the HIF offer increasing, a funding gap of £20m remains.

To enable the scheme to come forward BDL has proposed to increase their total junction contribution to £40m. If the HIF funding is made available and the scheme costs remain at or below £75m, this proposition would address the funding requirement. However, given that the HIF funding contract is not yet in place, FBC officers have advised that the planning condition for BDL to revert back with a confirmed junction funding strategy will need to remain.

The increased contribution from BDL impacts the overall viability of the scheme and this has led to BDL seeking to amend the previously approved viability position. Within its revised viability statement BDL has set out its proposed viability position as follows – it should be noted that the some of the statements are as per the consented scheme and others are updates as a result of the increased contribution to Junction 10.

Proposed BDL Financial Viability Position

BDL has stated that as a result of making the additional £20m contribution to the junction, the scheme now generates a return of 1.5% profit on both cost and Gross Development Value (GDV) down from 14.4% profit on cost (12.6% profit on GDV) level that the scheme was showing in October 2019.

Profit on cost is calculated by dividing the gross profit by the total development costs whereas profit on GDV is calculated by showing the profit as a percentage of total revenue. Both metrics are used within the development industry and are therefore also used by planning authorities when negotiating affordable housing quantum and viability. Either calculation of profit is acceptable and the reasonableness of the level applied is assessed by benchmarking against planning viability guidance and industry standards.

It is noted that, other than the additional £20m contribution to the junction, BDL has not sought to change any other assumptions within their model (values, costs, timings etc.), and nor have they considered reducing the £288m of site-wide infrastructure costs set out in the Infrastructure Delivery Plan.

BDL Proposed Viability Parameters

BDL Proposition October 2019	BDL Proposition December 2020	Comments
Profit of 14.4% (12.6% on GDV)	Profit of 1.5% on both profit on cost and GDV	BDL reports a significant reduction in profit and has submitted a revised viability proposition as a result. A 1.5% profit level is significantly below market norms.
The scheme should not be liable to pay the Community Infrastructure Levy (CIL)	The scheme should not be liable to pay the Community Infrastructure Levy (CIL)	No change
The developer contribution towards M27 Junction 10 costs is capped at £20m	The developer contribution towards M27 Junction 10 costs is capped at £40m	The BDL contribution is increased by £20m
Affordable housing to be 10% minimum	Affordable housing to be 10% minimum	No change. The Welborne Plan requires at least 10% affordable housing and up to 30% affordable, subject to viability
The affordable mix is split 50/50 between affordable rent and intermediate for the first 1000 homes. The position would then be reviewed at future viability reviews	The affordable mix is split 50/50 between affordable rent and intermediate for all 6000 homes	Change. The Welborne Plan requires a unit mix of 70/30 affordable rent and intermediate, subject to need and viability
No Passivhaus or Lifetime Homes provided for the first 1,000 homes. The position would then be reviewed at future viability reviews	No Passivhaus or Lifetime Homes provided in the scheme	Change. The Welborne Plan requires 10% Passivhaus and 15% Lifetime Homes, subject to viability
Viability reviews at 1,000 th unit and every 750 units thereafter	Viability reviews to be held at 3,000, 3,750, 4,500, 5,250 and 5,750 dwellings	Change. The first viability review is proposed at 3,000 homes rather than 1,000

In addition to the proposed changes BDL has put forward suggested changes to the viability review mechanism and these are outlined below.

BDL Proposed Viability Review Mechanism Changes

Other than the Housing Infrastructure Funding (HIF) funding being a grant to the Council but recoverable from the developer, the detailed requirements of HIF were not known when the planning application was approved in October 2019. FBC & BDL have since progressed discussions with Homes England regarding the offer of £30m HIF. At the time of drafting this report the HIF funding agreement has not been entered into and key principles have still to be finalised.

However, some of the conditions associated with HIF are now understood in more detail. It is a requirement that the grant is repaid if the viability of the scheme improves and this will be secured in the s106 agreement. Where HIF repayments are made, the money is retained by FBC rather than going back to Homes England. It is BDL’s proposition that any HIF funding that they repay is used to provide additional affordable housing within WGV. CBRE understands that how HIF repayments are used is not a matter for the Planning Committee to opine on, as such no comment is provided in this report as to the acceptability of this proposal.

Welborne Garden Village – Planning Viability Review January 2021

Given the specific conditions that HIF funding is subject to, BDL propose that two different recovery mechanisms will be applied to the scheme 1. HIF Repayment and 2. Planning Viability Review Mechanism. The first complies with HIF conditions and the second should comply with planning viability guidance.

1. HIF Repayment

- A developer return of 20% profit on cost is permitted
- 80% of any surplus above 20% profit on cost will be used to repay the HIF funding
- 20% of any surplus above 20% profit on cost will be retained by BDL

The HIF repayment terms are stipulated by Homes England as a condition for receiving the £30m grant. CBRE understands that the acceptability of the HIF conditions is not a matter for the Planning Committee to opine on as such no comment is made by CBRE in relation to this. It should however be noted that HIF repayment ranks ahead of any planning viability review mechanism i.e. the £30m must be repaid prior to any additional planning obligations being provided. As the £30m of HIF is retained by FBC, rather than be repaid to Homes England, FBC could choose to reinvest the £30m into WGV to provide additional affordable housing. If this were the case, the additional affordable housing, estimated at 150 units at current day values, would be counted towards the overall affordable housing percentage at Welborne.

2. Planning Viability Review Mechanism

The planning viability review mechanism must be in accordance with planning guidance. The mechanism proposed by BDL is as follows:

BDL Proposition October 2019	BDL Proposition December 2020	Comments
A minimum developer return of 20% on Profit on Cost	A minimum developer return of 20% on GDV	Profit being at 20% on GDV instead of 20% of costs is a higher threshold and less beneficial for the Council. BDL consider it to be a reasonable change as it is taking more risk in the delivery of the scheme due to the reduced viability
Finance Rate to be based on benchmarked prevailing market rates for the Cost of Capital appropriate for the project and be reviewed on a regular basis	Finance Rate to be based on benchmarked prevailing market rates for the Cost of Capital appropriate for the project and be reviewed on a regular basis	No change
Any surplus over 20% profit on cost would go towards meeting planning policy requirements on affordable housing %, tenure split, Passivhaus % and Lifetime Homes %. All surplus profits thereafter would go to the developer	50% of any surplus profit above 20% on GDV will go towards meeting planning policy requirements on affordable housing %, tenure split, Passivhaus % and Lifetime Homes %. All surplus profits thereafter would go to the developer	Previously there was no split of surplus profit
The maximum affordable housing delivered will be 40% in any single phase and 30% overall	The maximum affordable housing delivered will be 40% in any single phase and 30% overall	No change. The Welborne Plan requires this

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Where any phase is able to deliver in excess of 40%, financial contributions may be made in lieu of onsite delivery subject to agreement by both parties	Where any phase is able to deliver in excess of 40%, financial contributions may be made in lieu of onsite delivery subject to agreement by both parties	No change
The detailed workings of the mechanism will be secured in the S106 agreement	The detailed workings of the mechanism will be secured in the S106 agreement	No change

CBRE has been asked to advise FBC on the reasonableness of the proposed changes and our findings are detailed below.

CBRE REVIEW OF BDL'S PROPOSED CHANGES

Overall Scheme Viability

CBRE has historically undertaken extensive reviews of the financial appraisals prepared by BDL including detailed reviews of the supporting cost and value information. Our findings are contained in the Site Wide Viability Report and Addendum report prepared for the October 2019 planning committee.

In providing the updated financial appraisal BDL has not made changes to the cost and value assumptions except to include an additional £20m contribution towards the Junction. It should also be noted that within its appraisal BDL assumes: -

- 10% Affordable housing
- Affordable tenure is split 50/50 between affordable rent and intermediate tenures
- No Passivhaus or Lifetime Homes

CBRE has reviewed BDL's financial model and concurs with its assumption that the scheme delivers a profit of 1.5% (on costs and revenue) when undertaken using the above assumptions.

Gross Development Value	625,271
Costs (inc interest)	616,097
Profit	9,175
Profit on costs %	1.5%
Profit on GDV %	1.5%

Developer Junction Contribution Capped at £40m

BDL has proposed to increase its contribution to the junction to £40m. CBRE's previous report to Planning Committee stated that, "if the BDL contribution towards M27 Junction 10 costs is increased beyond £20m it will adversely affect the viability of the scheme and the ability to meet the various policy requirements". The viability modelling undertaken above shows that BDL is unable to provide more than £40m, without further policy concessions. Indeed, given that a profit of only 1.5% is generated, which is significantly below market norms, a £40m contribution is significantly higher than most developers would provide.

Two Review Mechanisms – HIF & Planning

CBRE has been involved in other HIF schemes either working for Homes England in reviewing and conducting due diligence on funding applications; or for applicants, where local authorities have sought to obtain funding. We are aware of a number of similar situations where there are two or more recovery mechanisms applied to schemes and consider this to be acceptable.

HIF Repayment

The HIF profit threshold is lower than the proposed planning viability mechanism, as it is based on costs rather than revenue. The HIF share of profit, above the 20% profit on cost threshold, is 80%. Based on the most optimistic sensitivity analysis undertaken, it is estimated that HIF can start to be recovered at around 2034 or 3750 homes as this is when the 20% profit on cost threshold could be exceeded.

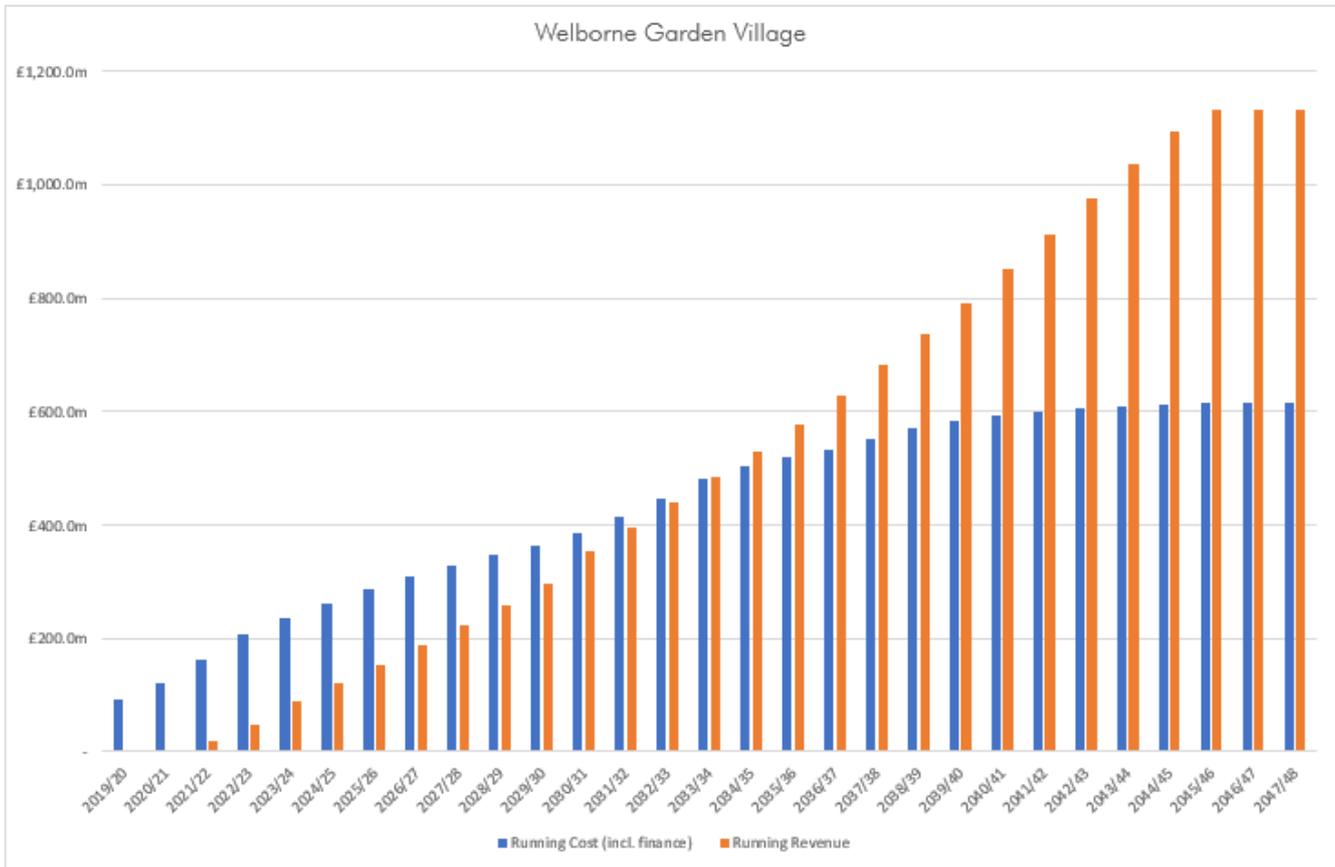
FBC will have received £30m in HIF repayments prior to any planning viability review benefits being received. The Borough Council can decide whether to invest the HIF funding in affordable housing at Welborne or elsewhere in the Borough, although this is not a decision for the Planning Committee. At present day values, £30m of HIF repayments equates to circa 150 additional affordable homes at Welborne.

First Planning Viability Review at 3,000 Homes

On today's costs and today's values the scheme will not be able to provide any more than 10% affordable housing at any point – this scenario generates a profit of 1.5%. To opine on the reasonableness of moving the first review from 1,000 homes to 3,000 homes CBRE has undertaken sensitivity modelling. The sensitivity modelling is based on the most optimistic scenario included within the Site Wide Viability Report produced for the October 2019 Planning Committee. Within this it was assumed that values could grow at 3% and costs at 2%. In addition, a placemaking premium of 20% was also included.

The cashflow of this sensitivity scenario was examined and this showed that the scheme is unlikely to deliver sufficient levels of profit prior to 3,000 units and this is illustrated by the graphic below.

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The blue bars show costs incurred and the revenue is shown in orange. It shows that it takes circa 15 years for the scheme to break even and that most of the profit is delivered towards the back end of the scheme. It is important to note that this chart is derived from the most optimistic scenario described above. CBRE therefore concludes, on viability grounds, that it is not unreasonable for the first viability review to be moved from 1,000 homes to 3,000 homes.

Profit of 20% of Gross Development Value

BDL proposes that it can achieve a profit of 20% of Gross Development Value (GDV) before it must make additional payments towards affordable housing. Previously profit was assessed as being 20% on cost, however both methods are acceptable and used within the development industry. With regard to profit level the National Planning Policy Guidance (NPPG) states the following:-

"...an assumption of 15-20% of gross development value (GDV) may be considered a suitable return to developers in order to establish the viability of plan policies. Plan makers may choose to apply alternative figures where there is evidence to support this according to the type, scale and risk profile of planned development. A lower figure may be more appropriate in consideration of delivery of affordable housing in circumstances where this guarantees an end sale at a known value and reduces risk. Alternative figures may also be appropriate for different development types." - (Paragraph: 018 Reference ID: 10-018-20180724).

The profit level proposed by BDL sits within the range identified within the NPPG albeit at the top end of range. When determining the level of profit that should be applied it is necessary to consider the risks associated with

the scheme, with higher risk schemes allowed higher returns and vice versa. The viability modelling shows that WGV generates a developer's profit of 1.5% on today's costs and values. This is at a level below which developers would generally consider bringing schemes forward and significantly below the range identified within the NPPG. BDL is therefore proceeding at risk in the hope that values will increase over time enabling it to achieve a return in line with market norms. In consideration of the risk being undertaken by BDL a profit of 20% on GDV is considered reasonable. It is worth noting that committing to deliver 10% affordable housing on a scheme generating a 1.5% profit is unusual. Most developers would seek to reduce affordable housing further in this scenario.

50/50 Profit Share above 20% Profit on GDV

FBC will have received £30m in HIF repayments prior to any planning profit share being received. CBRE is not aware of any formal planning viability guidance in relation to profit share. As such we have reviewed the proposal to provide a 50/50 profit share on a commercial basis. CBRE has been involved in multiple projects and joint ventures where profit share is agreed between the parties. A 50/50 profit share above 20% profit on GDV is considered to be an equitable position particularly as developers need to be incentivised to generate surplus profit. If 100% of any surplus profit was claimed by FBC there would be no reason for BDL, or indeed any developer, to seek to achieve any additional value.

Even without the benefit of FBC potentially receiving £30m of HIF repayments, CBRE considers a 50/50 share of surplus profits to be reasonable and equitable to both parties.

Additionality through improved viability

The Welborne Plan requires 30% affordable housing, a 70:30 affordable rent: intermediate tenure mix, 10% Passivhaus and 15% Lifetime homes to be provided unless viability considerations demonstrate that this is unaffordable. Through the planning viability review mechanism, the council has a choice about what should be provided if the scheme begins to make higher profits. These choices are to increase the number of affordable housing units, vary the affordable tenure or deliver Passivhaus homes or lifetime homes, or a combination of any of the above.

The viability modelling supports BDL's view that the scheme cannot afford to provide more affordable housing units, a more beneficial tenure split, Passivhaus or Lifetime Homes. We would however advise that FBC retains the ability to assess if these requirements can be delivered at future viability reviews.

SENSITIVITY ANALYSIS

As the viability of the scheme is impacted by the proposed change, CBRE has re-run the sensitivity analysis undertaken previously to show how viability could be improved in different growth scenarios. The analysis incorporates both the HIF and Planning viability review mechanisms. It therefore shows the potential for HIF to be repaid and the potential level of affordable housing that could be delivered under each scenario. In addition, it shows how much money could be available to Fareham to improve the housing proposition at Welborne as above or to invest in affordable housing elsewhere in the Borough

	Base Case (Nil growth)	3% Value Growth & 2% Cost Growth Only	20% Placemaking & 3% Value & 2% Cost Growth
Gross Development Value	£625.3m	£871.4m	£899.7m
Cost (ex. Finance)	(£451.6m)	(£535.1m)	(£535.1m)

Welborne Garden Village – Planning Viability Review January 2021

Finance Costs	(£164.5m)	(£106.5m)	(£98.8m)
Gross Profit/Deficit (pre HIF repayment and provision of additional affordable housing)	£9.2m	£229.7m	£265.8m
<i>Profit as % of costs</i>	1.5%	36%	42%
<i>Profit as % of GDV</i>	1.5%	26%	30%
Developer Profit/Deficit (Post HIF repayment & Planning Viability Reviews)	£9.2m	£184.1m	£194.8m
<i>Profit as % of costs</i>	1.5%	29%	31%
<i>Profit as % of GDV</i>	1.5%	21%	22%
Affordable Housing			
Guaranteed Affordable Housing %	10%	10%	10%
Guaranteed Affordable Housing units	600	600	600
HIF repayment			
HIF Repaid to FBC	-	£30.0m	£30.0m
Additional Affordable Housing units If HIF converted to affordable housing at Welborne (at current day values)		150	150
Planning viability recovery			
On-site additional Affordable Housing % up to 40% on each phase	0%	3.75%	3.75%
On-site additional Affordable Housing Units up to 40% on each phase	0	225	225
Additional funds available to Fareham for an improved housing proposition at Welborne or off-site Affordable Housing at FBC discretion	-	£15.6m	£41.0m

The sensitivity analysis shows, that subject to growth occurring as per the assumptions outline above, there is a reasonable prospect for additional affordable housing to be provided on site. The analysis shows that it may be limited to circa 14% on site and this is due to:-

- The overall viability position as outlined within the report
- The scheme not generating surplus profit until the back end of the scheme – as shown in the chart under the 'First Viability Review at 3,000 Homes' section most of the profit is generated towards the end of the scheme A maximum of 40% affordable housing within each phase – there could be situations, at viability review stage, where the scheme could financially afford to provide more affordable housing but the 40% phase cap would be reached resulting in a financial contribution to FBC.

The sensitivity analysis focuses on the ability to provide additional affordable housing. However, where a surplus is generated FBC could choose to improve the housing proposition at Welborne as above (subject to the agreement of BDL) or invest its funds in offsite affordable housing provision.

CONCLUSIONS

CBRE is of the view that the revised proposition put forward by BDL is reasonable on viability grounds. We therefore concur with BDL that as a result of making an additional £20m contribution to the junction:-

Welborne Garden Village – Planning Viability Review January 2021

- Overall, the scheme produces a profit of 1.5% based on today's costs and values
- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £40m
- Affordable housing should be 10% minimum
- Viability reviews should be held at 3,000, 3,750, 4,500, 5,250 and 5,750 dwellings
- The affordable mix is split 50/50 between affordable rent and intermediate tenures but this should be re-assessed during future viability reviews
- The scheme is unable to provide Passivhaus or Lifetime Homes but this should be re-assessed during future viability reviews
- It is appropriate to have two recovery mechanisms – HIF repayment & Planning viability review
- The Profit at 20% on GDV proposed for the Planning viability review is in line with planning guidance
- The 50/50 profit share proposed for the Planning viability review is reasonable



WELBORNE GARDEN VILLAGE

Planning Viability Review

Addendum Report

July 2021

Welborne Garden Village – Planning Viability Review July 2021

CBRE has been instructed by Fareham Borough Council (FBC) to undertake a review of the further amendments to the outline planning application submitted by Buckland Development Ltd (BDL), issued on 8th June 2021, in relation to Welborne Garden Village (WGV).

Reliance

This report is addressed to Fareham Borough Council only and should not be reproduced without our prior consent.

Background

CBRE previously advised FBC on viability statements prepared by BDL in relation to the viability of WGV. This culminated in the approval of the planning application for WGV in October 2019. CBRE undertook a detailed review of the proposals put forward by BDL in the lead up to the October 2019 planning decision and concluded, on viability grounds, that:-

- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- The developer contribution towards M27 Junction 10 costs is capped at £20m
- Affordable housing for the first 1,000 units should be 10%
- The affordable mix for the first 1,000 units is split 50/50 between affordable/social rent and intermediate tenures
- The scheme is unable to provide Lifetime Homes or Passivhaus for the first 1,000 homes

In addition to the above, terms were agreed for a viability review mechanism. The purpose of this was to monitor and review the viability of the scheme over time so that if viability improved it could be possible for the policy requirements to be met either partially or in full. The key terms of the viability review mechanism were as follows:

- First review to be completed following completion of the 1,000th residential unit and occur at a frequency of 750 unit completions thereafter.
- The review will be in accordance with the agreed financial model and a number of agreed financial parameters. Over time, the actual known costs and revenues will replace the original forecasts.
- In addition to 750 unit phase reviews, BDL will provide an annual financial return statement as part of the monitoring arrangement with FBC.
- Any additional grant funding received may trigger a standalone viability review.
- Affordable quantum and tenure, Lifetime Homes and Passivhaus will form part of future viability reviews. FBC will have the ability to adjust and prioritise its requirements in relation to these items should the scheme not be able to afford them all.

An important part of the viability position at the time was how the new Junction 10 of the M27 would be funded. The junction must be provided to enable more than 1,160 units to be occupied due to highway constraints. At the point of the planning application determination, it was highlighted that there was a funding gap for the estimated £80-90m costs of the Junction 10 scheme. Funding had been allocated as follows:

- £20m developer contribution
- £10m of Housing Infrastructure Funding provided by Homes England, unconfirmed
- £14.15m of Solent Local Growth Deal funding allocated by the LEP
- £14.9m of Solent Growth Deal funding retained by the DfT

Given that all the funding for the junction was not in place, a planning condition was imposed for BDL to revert back with a confirmed junction funding strategy before any development, other than the Junction 10 works, could commence.

Welborne Garden Village – Planning Viability Review July 2021

Planning Viability Review – January 2021

Further to the approval of the planning application in October 2019, BDL submitted an updated planning viability statement, dated 17th December 2020, in relation to WGV. This was driven by the requirement for BDL to provide clarity over the funding strategy for the infrastructure works which relate to Junction 10 of the M27.

The Junction 10 scheme delivery cost was estimated to be in the region of £75m, following the progression of a more cost-effective design.

Of the £14.9m Solent Growth Deal funding retained by DfT, £5.5m has been advanced to progress scheme design. The remaining Solent Growth Deal funding retained by DfT, and the £14.15m locally earmarked Solent Growth Deal funding has been reallocated to other infrastructure projects in the LEP's pipeline that could spend the funding before the end of March 2021.

Discussions with Central Government resulted in an increase in the offer of Housing Infrastructure Funding (HIF) from £10m to £30m. However, even with the scheme costs reducing and the HIF offer increasing, a funding gap of £20m remained. To enable the scheme to be brought forward BDL proposed to increase their total junction contribution to £40m.

CBRE was instructed by FBC to undertake a review of the updated planning viability statement submitted by BDL. Following a detailed review of the revised proposal, CBRE was of the opinion that the revised proposition put forward by BDL was reasonable on viability grounds and that as a result of making an additional £20m contribution to the junction:-

- Overall, the scheme produces a profit of 1.5% based on today's costs and values
- The developer contribution towards M27 Junction 10 costs is capped at £40m
- The scheme should not be liable to pay the Community Infrastructure Levy (CIL)
- Affordable housing should be 10% minimum
- The affordable mix is split 50/50 between affordable rent and intermediate tenures but this should be re-assessed during future viability reviews
- The scheme is unable to provide Passivhaus or Lifetime Homes but this should be re-assessed during future viability reviews
- Viability reviews should be held at 3,000, 3,750, 4,500, 5,250 and 5,750 dwellings
- It is appropriate to have two recovery mechanisms – HIF repayment & Planning viability review
- The use of 80% of any surplus above 20% profit on cost to repay the HIF funding and the developer to retain 20% of any surplus is reasonable.
- The Profit at 20% on GDV proposed for the Planning viability review is in line with planning guidance
- The 50/50 profit share proposed for the Planning viability review is reasonable

Current Position

FBC submitted a recommendation to the full Council on 7th June 2021 that the area of Welborne be nil rated under the Revised Community Infrastructure Levy (CIL) Charging Schedule. This was approved on 10th June 2021 on the basis that the imposition of CIL at Welborne, in addition to the site wide infrastructure works required, would impact development viability.

The M27 Junction 10 scheme delivery cost is now estimated to be in the region of £81m. Discussions with Central Government have resulted in an increase in the offer of funding to £42m. This comprises £41.25m of Housing Investment Grant (HIG) funding and £750,000 Capacity Funding from Homes England. CBRE is aware that negotiations on this are progressing at pace and although there is a reasonable prospect of this funding being available for Welborne Garden Village, the funding remains subject to completion of various documents namely,

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the S106 Agreement and the Grant Determination Agreement (GDA) between Homes England and Hampshire County Council. In addition, FBC is required to enter into a Memorandum of Understanding (MOU) with Homes England which relates to HIG recovery, recycling and the monitoring and reporting of housing output at WGV.

CBRE has been advised that as part of the proposed agreement Homes England is seeking to bring forward the first planning viability review to 2,000 homes with subsequent reviews to take place upon completion of the 3,000th, 4,000th, 5,000th and 5,800th home. This would be in addition to the review being proposed by BDL upon receipt of confirmation of any cost overruns which may result in a reduction of the number of affordable housing units to be delivered at WGV.

To enable delivery of the Junction 10 scheme BDL has proposed to increase their total junction contribution to £40m and to bear any cost overruns up to a maximum of £10m – equating to a total potential contribution of £50m. If the HIG funding is made available and the scheme costs remain at or below £81m, this proposition would address the funding requirement.

The potential increased contribution from BDL could impact the overall viability of the scheme, particularly the provision of affordable housing, and this has led to BDL seeking to amend the previously approved viability position in the event that the £10m cost overrun is required. Within its revised viability statement BDL has set out its proposed viability position as follows – it should be noted that the some of the statements are as per the consented scheme and others are updates as a result of the potential requirement to make an additional £10m contribution to Junction 10.

Proposed BDL Financial Viability Position

BDL has stated that should there be a requirement to contribute an additional £10m, taking total developer contribution to £50m, to cover any exceptional cost overrun during the construction of the junction, this will further impact the viability of the scheme. In order to maintain a return of 1.5% profit on both cost and Gross Development Value (GDV), down from 14.4% profit on cost (12.6% profit on GDV) level that the scheme was showing in October 2019, the number of affordable housing units may need to be reduced below the previously agreed level of 10%.

In order to maintain current levels of profitability, BDL has proposed that any cost overrun contribution should result in a reduction of one affordable housing unit for each £62,500 increment of overspend. If the additional contribution of £10m is required in full this will result in a reduction of 160 affordable housing units throughout the development period.

CBRE has been asked to advise FBC on the reasonableness of the proposed changes and our findings are detailed below.

CBRE REVIEW OF BDL'S PROPOSED CHANGES

CBRE has historically undertaken extensive reviews of the financial appraisals prepared by BDL including detailed reviews of the supporting cost and value information. Our findings are contained in the Site Wide Viability Report and Addendum report prepared for the October 2019 planning committee and the subsequent planning viability review undertaken in January 2021.

In providing the updated financial appraisal, BDL has not made changes to the cost and value assumptions nor have they considered reducing the £288m of site-wide infrastructure costs set out in the Infrastructure Delivery Plan which, for the avoidance of doubt, does not include the contribution to the M27 Junction 10 improvement works. The key changes include the additional £10m contribution towards the junction works and a reduction of the total number of affordable housing units from 600 to 440 units. Whilst a review of the updated financial appraisal has been undertaken to determine the extent of BDL's proposed amendments and the reasonableness of its inputs and assumptions, CBRE has not undertaken an audit of the functionality of the financial model itself. It is assumed that the formulas are correct and that the model outputs can be relied upon.

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BDL have sought to determine what impact any cost overrun contribution may have on scheme viability. If the developer's contribution is to be increased to £50m from the current cap of £40m whilst maintaining a profit of 1.5%, BDL has indicated that a reduction of 160 affordable housing units, to a total of 440 units, is required; this equates to an overall reduction of 2.7% in affordable housing provision across the development lifecycle.

Based on today's costs and values, the current low levels of profit indicate that any substantial increase in costs will lead to a deficit and impact the viability of the scheme. Furthermore, it is important to note that current levels of profitability without the cost overrun is significantly below market norms and a total developer contribution of £50m is significantly higher than most developers would provide under these circumstances.

The proposed mechanism of reducing affordable housing provision by one unit for each £62,500 increment of overspend is a factor of the maximum additional contribution of £10m for any cost overruns divided by the overall reduction of the affordable housing units. Given that the timing and potential for cost overruns are unknown at this stage, this appears to be an equitable way of determining a reduction in order for the development to commence.

In addition, it is likely that the junction 10 works are due to take place during the earlier stages of development and perhaps even prior to the initially proposed viability review at 2,000 homes. The earlier the requirement to provide the additional contribution of up to £10m, the more significant the impact to affordable housing delivery as the scheme could incur increased finance costs.

Any reduction of affordable housing to be agreed with BDL will be subject to scrutiny at each viability review and revised upwards if actual costs and values show that the scheme is more profitable than currently predicted. Notwithstanding this, previous sensitivity analysis undertaken by CBRE indicated that it takes circa 15 years for the scheme to break even and that most of the profit is delivered towards the back end of the scheme.

Overall, it appears that proposed mechanism for reducing the number of affordable housing units to a minimum of 7.3% is reasonable if BDL is required to contribute additional funding over and above the existing cap of £40m.

CONCLUSIONS

BDL previously agreed to increase its contribution to the junction to £40m. CBRE's previous report to Planning Committee stated that, "if the BDL contribution towards M27 Junction 10 costs is increased beyond £20m it will adversely affect the viability of the scheme and the ability to meet the various policy requirements". Subsequent viability modelling undertaken demonstrated that BDL is unable to provide more than £40m, without further policy concessions.

CBRE is of the view that the revised proposition put forward by BDL is reasonable on viability grounds. We therefore concur with BDL that as a result of bearing additional cost overruns to a maximum of £10m, taking the total developer contribution to £50m, in relation to the proposed junction: -

- Overall, the scheme produces a profit of 1.5% based on today's costs and values
- The developer contribution towards M27 Junction 10 costs is capped at £40m with a potential extra £10m for cost overruns
- Affordable housing should be 10% minimum until such a time that cost overruns have been confirmed
- A reduction in affordable housing provision by one unit for each £62,500 of additional contribution is reasonable
- Any reduction in the provision of affordable housing should not fall below a minimum of 7.3% in the event of any cost overruns
- The affordable mix is split 50/50 between affordable rent and intermediate tenures but this should be re-assessed during future viability reviews

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- The scheme is unable to provide Passivhaus or Lifetime Homes but this should be re-assessed during future viability reviews
- Viability reviews should be held at 2,000, 3,000, 4,000, 5,000 and 5,800 dwellings
- It is appropriate to have two recovery mechanisms – HIG repayment & planning viability review. HIG repayments will precede the planning reviews and all payments will be made in line with the proposed profit sharing arrangement agreed in January 2021.