

Dear Councillor

COUNCIL - THURSDAY, 26 FEBRUARY 2026

Please find attached, for consideration at the meeting of the Council on Thursday, 26 February 2026, the following reports which were unavailable when the agenda was published.

Agenda No Item

10. **Report of Cabinet - 18 February 2026 (Pages 3 - 198)**

Following the Cabinet meeting, the report of Cabinet is enclosed.

The Liberal Democrat alternative budget proposals for 2026/27 are enclosed alongside the Cabinet recommendations.

12. **Questions (Pages 199 - 202)**

To ask questions under Standing Order 22. Questions received are enclosed.

Yours sincerely

Kate Ryan
Chief Executive

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Council – 26 February 2026

Report of Cabinet – [18 February 2026](#)

Part I – Items resolved by Cabinet

None

Part II – Recommendations to Council

1. Housing Revenue Account Budget and Housing Public Sector Capital Expenditure Programme 2026/27

Portfolio – Housing and Homelessness

Recommended:

That Council agrees:

1. that from 06 April 2026, an increase in dwelling rents of 4.8% from the 2025/26 weekly rent level, in accordance with Government guidelines, be agreed;
2. that from 06 April 2026, an increase in garage rents of 4.8% from the 2025/26 weekly rent level be agreed;
3. that from 06 April 2026, shared ownership property rents be increased in line with the applicable rent review provisions within each lease. For the eight properties held under leases allowing RPI+0.5%, an increase of 5.00% from the 2025/26 weekly rent level be agreed, for all properties which are subject to CPI+1% under the current model lease, an increase of 4.8% be agreed and the weekly rent of one property sold under previous legislation be agreed to increase by 4.8%;
4. that from 06 April 2026 Service Charges will continue to reflect actual charges;
5. that the HRA budget, as set out in Appendix 1 of this report, be agreed; and
6. that a Housing Capital Programme to 2028/29, as set out in Appendix 4, be agreed.

Cabinet Discussion:

The Portfolio Holder for Housing and Homelessness presented the report. He was pleased that the proposed Housing and Revenue Account (HRA) budget for 2026/27 was a balanced budget. He explained that the budget underpinned the corporate plan priorities and was supported by a 30-year business plan forecast. He highlighted several points of significance within the report.

These included:

- A £19 million spend on the maintenance of tenants' properties in 2026/2027.
- A £15.2 million spend on the continued development and acquisition of new Council dwellings.
- There would be rent increases in order to achieve a balanced budget, however these were in line with the Government's guidelines.
- A £1.3 million budget was proposed to ensure continued and improved fire safety compliance.
- A £3 million budget was proposed for Home Energy Improvement programmes.

The Assistant Director of Finance provided further information on the report. He explained in further detail the recommendations before Cabinet, including increases to rent and service charges plus the approval of the HRA Capital Programme. He explained that, as required, the HRA budget was balanced and was also supported by the 30-year business plan. The proposed HRA budget prudently maintained the HRA reserve of £1 million.

Cabinet heard that there was sufficient capacity within the budget to meet statutory, regulatory and landlord obligations. It was reported that rents were being increased by 4.8% in line with Government policy. The enhanced level of income would enable the Council to continue to invest in its existing housing stock.

The Assistant Director for Finance summarised the various elements of the budget, including the Capital Programme. The report had been considered by the Tenant Involvement Group and the Council's Housing and Communities Overview and Scrutiny Panel. The Assistant Director of Finance explained that there were certain corrections to be made in relation to the report. Paragraph 34 should state a figure of £824,000,

paragraph 38 should refer to paragraphs 26-28 rather than section 3, and paragraph 56 should contain reference to paragraphs 33 and 34.

Overall, the proposed budget was financially sustainable, protects tenants' safety and service standards, enables continued delivery of new affordable homes, aligns with national policy and the Council's corporate priorities.

The Portfolio Holder for Finance and Corporate commented on the Maintenance Programme, the level of funding that the Council puts into it and the subsequent high standard of housing provision. He hoped that the new authority following Local Government Reorganisation (LGR), would meet the challenge of continuing the high standard of service provided by NFDC.

The Portfolio Holder for Housing and Homelessness answered a question from a non-executive member on EPC Energy Efficiency targets. He explained that despite the challenging nature of the Government's ever-changing EPC 'C' rating criteria, the Council was on target to meet required standards.

Appendix 1 – Updated Background Report to Cabinet

2. Medium Term Financial Plan and Annual Budget 2026/27

Portfolio – Finance and Corporate

Recommended:

That:

1. the updated Medium Term Financial Plan (MTFP) and financial strategy, as set out in the report and throughout appendices 1-3, be approved.
2. there is a General Fund Net Budget Requirement in 2026/27 of £26.630 million, as set out in appendices 5a - 5d of the report;
3. the New Forest District Council Band D Council Tax for 2026/27 shall be £211.92 (paragraph 37);
4. the General Fund Capital Programme for 2026/27 of £14.646 million, as set out in appendix 6 to this report be approved; and
5. the proposed fees and charges as included at appendix 7 to the report be approved.

Cabinet Discussion:

The Portfolio Holder for Finance and Corporate introduced the report. He explained that the Council had produced a balanced budget for 2026/2027. He congratulated the hard work that had gone into the budget, though acknowledged the challenges facing the Council with a medium-term financial gap of £3.4 million. The Council was running a Capital Programme for 2026/27 of £14.646 million which would enable the Council to deliver a range of projects across the district. He commented on the detrimental impact that the Government's 'Fair Funding' Review had on the Council's finances. Despite promises of new burdens funding to support food waste collection, the Council was going to receive £1.2 million less funding than it received now.

The Portfolio Holder confirmed that council tax would increase by 2.99%, with District Council tax increasing by £211.92 for a band D dwelling, which equated to an increase of £3.95 a week. Cabinet heard that the extended producer's responsibility funding was increasing to £2.4 million. The Council aligned its budgets with the corporate priorities with, among other things, focus on the new waste service, public conveniences refurbishments and a new Council ICT service.

The Assistant Director of Finance explained that the Council had a balanced General Fund budget for 2026/27 including a net budget requirement of £26.6 million. This had been achieved without the need to use the budget equalisation reserve; however, the medium-term forecast did identify a £3.4 million deficit. The Government's Fair Funding review had disproportionately affected rural and District councils, with a reduction in funding of £1.2 million over the settlement period. Grant simplification has rolled up several previously discreet grants into the overall revenue support grant contributing to the overall reduction, additionally the Council had not received the previously assumed £1.5 million food waste funding reductions. Council tax had been increased by 2.99% in line with Government limits. Within the budget there had been service investment across the Council's key priorities with enhancement in several service areas and resources provided for the LGR process.

It was explained that there was additional income through the extra £1.3 million EPR money as well as an additional £1.9 million from fees and charges, contractual income growth and positive movement on the pension contributions made by the Council. Cabinet was reminded that the budget also contained the £14.6 million Capital Programme. Appendix 5b required a minor presentational adjustment to align with Appendix 5a. A non-executive member commented on this being NFDC's final budget prior to the LGR Structural Change Order and wider

oversight, acknowledging the service investments made by the Council and referring to the level of car parking charges. The Portfolio Holder for Finance and Corporate explained that the Council undertook a reset of its car parking charges to align with comparable charges in other areas seeing subsequent increases in line with inflation.

Appendix 2 – Updated Background Report to Cabinet

3. Lymington and Pennington Neighbourhood Plan – Making the Plan (Referendum and Decision on Adoption)

Portfolio – Planning and Economy

Recommended:

That Council:

1. Notes the outcome of the referendum of 29 January 2026; and
2. Agrees that the Lymington and Pennington Neighbourhood Plan be 'made' (adopted) as part of the Development Plan for New Forest District (Outside the National Park).

Cabinet Discussion:

The Portfolio Holder for Planning and Economy introduced the report. He explained that neighbourhood plans gave communities a direct role in the development of their local area. The plan had been developed over the last 10 years, with work being led by the Lymington and Pennington Town Council steering group, supported by NFDC and the National Park Authority. A referendum was held on 29 January which resulted in a 92.5% vote in support of the adoption of the plan. If NFDC were to formally adopt the plan at Council, it would form a part of the statutory development plan and would guide decisions made on planning applications.

Non-Cabinet members congratulated the various bodies that had worked on the development of the plan and acknowledged the benefit it would bring the local area. The Planning Policy Team Leader gave thanks to those who had worked on the plan including, the Neighbourhood Plan steering group, the wider community and the Council's Electoral Services team who facilitated the referendum. A non-Cabinet member asked a question on the development of the Fawley neighbourhood plan, to which Officers would respond after the meeting

Appendix 3 – Background Report to Cabinet

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Cabinet – 18 February 2026**Housing Revenue Account Budget and Housing Public Sector Capital Expenditure Programme 2026/27**

Purpose	For Decision
Classification	Public
Executive Summary	The report sets out a proposed balanced HRA budget for 2026/27, including decisions to be taken on dwelling rents, garage rents, shared ownership rents and service charges. The proposed budget includes uplifted maintenance budgets, meaning that a total of £19.293 million will be spent on maintaining tenants' properties in 2026/27. This proposal supports the Council's Corporate Plan commitments and responsibilities to its tenants. Budgets of £1.300 million and £3.000 million are proposed for Fire Safety & Statutory compliance, and Home Energy Improvement programmes respectively. The proposed Capital Programme totals £31.550 million, including spend of £15.200 million on the continued development and acquisition of new Council dwellings. The Capital programme requires external loan finance of £14.045 million, with the cost of this borrowing covered in the medium-long term through the rents' payable. The budget is supported by a 30-year business plan forecast and spending decisions taken within this proposed budget support the financial sustainability of the HRA over this longer-term period through the protection of the minimum reserve balance and an appropriate level of interest cover.
Recommendations	That Cabinet recommend approval of the following to Council:

	1. that from 06 April 2026, an increase in dwelling rents of 4.8% from the 2025/26 weekly rent level, in accordance with Government guidelines, be agreed; 2. that from 06 April 2026, an increase in garage rents of 4.8% from the 2025/26 weekly rent level be agreed; 3. that from 06 April 2026, shared ownership property rents be increased in line with the applicable rent review provisions within each lease. For the eight properties held under leases allowing RPI+0.5%, an increase of 5.00% from the 2025/26 weekly rent level be agreed, for all properties which are subject to CPI+1% under the current model lease, an increase of 4.8% be agreed and the weekly rent of one property sold under previous legislation be agreed to increase by 4.8%; 4. that from 06 April 2026 Service Charges will continue to reflect actual charges; 5. that the HRA budget, as set out in Appendix 1 of this report, be agreed; and 6. that a Housing Capital Programme to 2028/29, as set out in Appendix 4, be agreed.
Reasons for recommendation(s)	The Current National agreed Rent Settlement allows for social housing rents to be increased by up to CPI +1%. To maximise rental income to continue to afford and provide energy efficient, safe and quality housing to our tenants, and to continue to provide new affordable housing it is recommended to set the rent increase to the maximum allowable and to confirm the capital programme to comply with statutory compliance regulations, the Social Housing Regulation Act 2023 and the Council's Corporate Plan commitments.

Ward(s)	All
Portfolio Holder(s)	Cllr Steve Davies – Housing and Homelessness
Strategic Director(s)	Richard Knott – Chief Operations Officer (Deputy Chief Executive)
Officer Contact	Alan Bethune Strategic Director Corporate Resources (Section 151 Officer) 023 8028 5001 Email: alan.bethune@nfdc.gov.uk Peter Matthew Interim Strategic Director Housing and Communities 023 8028 5729 Email: peter.matthew@nfdc.gov.uk Kevin Green Principal Service Accountant 023 8028 5067 Email: kevin.green@nfdc.gov.uk

Introduction and background

1. This report sets out the proposed Housing Revenue Account (HRA) budget, the proposed rent levels and other charges, the maintenance programme and a proposed Housing Public Sector Capital Programme for 2026/27 – 2028/29.
2. The proposed budgets for 2026/27 were considered by tenants on the Tenants' Involvement Group on 15 January 2026 and by the Housing and Communities Overview and Scrutiny Panel on 21 January 2026. Their comments are included in paragraphs 73-78 of this report.
3. The proposed HRA budget is attached as **Appendix 1**, the detailed maintenance programme at **Appendix 2**, the 3-year forecast medium term financial position at **Appendix 3**, the proposed Capital programme at **Appendix 4** and a 30-year business plan briefing document at **Appendix 5**.

Key Issues

4. Housing Authorities and Registered Providers face on-going challenges to maintain the continuation of high-quality services to their tenants, ensuring that buildings are safe and free from hazards and delivering greater energy efficiency measures in the retrofitting of their stock, as well as delivering more affordable homes. Tenants, too, are facing challenges over rises in the cost of living. The proposal set out below to increase rents in line with the Government's current recommendation is considered to strike the right balance to ensure that the Council continues to provide high quality services to tenants and that the necessary programmes of maintenance and repairs to council housing stock are undertaken, as well as delivering Home Energy Improvement targets (EPC C and above) and new affordable council homes in the district.
5. Members are asked to consider a number of financial issues for 2026/27.

Housing Rents

6. The proposed budget identifies a social rent increase of 4.8%, in line with the Government's policy rent increase guidelines. It is the seventh increase, following a previous four-year social rent reduction programme.
7. Following the rent increase, average weekly rents will be £133.36 for 2026/27. The actual increase will vary by property but will amount to an average increase of £6.10 per week. Approximately two thirds of tenants are in receipt of benefits to help pay rent costs.
8. In 2023/24 the Government restricted rent increases to 7% rather than the 11.1% that would have applied under the policy of CPI+1%. This meant that actual rents have since that time been lower than formula rent levels, and income fell behind the inflationary costs to the service. The formula rent is still calculated per property and is a guideline figure to show what the rent would have been had there been no rent restrictions in place.
9. The Government has been considering allowing Councils to increase rents by an amount greater than the standard 4.8%, in order to move back towards formula rent levels, using rent convergence – the act of closing the gap between actual rents and formula rents over a period of time. The Housing Minister has now announced that convergence will not be implemented for the 2026/27 financial year but that 2027/28 weekly rents will be permitted to rise by £1 over and above CPI+1% and then by £2 above CPI+1% from 2028, until formula rent is reached.

10. This approach to rent setting enables the council to continue to provide homes that are safe, warm, and attractive places to live for our tenants. For example, the extra rental income allows stable long-term investment in our housing stock to deliver our ambition of improving the energy efficiency of over 3,200 homes to at least EPC C or above by 2030 (Corporate plan 2024 to 2028).
11. The recognised benefits to tenants and their households include better health outcomes, and homes that are cheaper to keep warm. Warmer homes are also better for the environment and for the council in meeting its housing energy efficiency targets.
12. We have a total housing stock of 5,275 well-maintained homes with 98.8% meeting the current Decent Homes Standard. Whilst we do not have any high-rise building, included in our housing stock and requiring on-going capital investment to ensure specific health and safety requirements such as enhanced fire remediation works are met due to vulnerabilities are:
 - 3 Extra Care Schemes
 - 81 units of HRA owned Temporary Accommodation comprising 101 bedrooms
 - 1 Scheme for ex-rough sleepers
13. The previous, current and proposed HRA budget allows for around 20,000 responsive repairs each year and the works to relet 250 empty properties per year. This has been reflective of demand, though it continues to increase and tenant expectations continue to rise. From the 01 April – 31 December 2025 the housing landlord service has attended 26,063 repairs which demonstrates a demand increase of 30.3%, with the potential to rise by the end of the financial year 2025-26. In addition, social mobility is increasing with over 400 empty properties requiring relet works.
14. It is worth noting that 1,185 of these repairs were classed as Emergency repairs requiring 3 hours attendance anywhere within the large geography of the New Forest, in turn creating operational delivery pressures for the teams involved to meet the response times.
15. Despite this spike in demand, performance in November 2025 against SLA timeframes is recorded as:

Urgent Jobs	Priority Jobs	Routine Jobs	Programmes works
97.89%	96.28%	93.89%	98.72%

16. Our tenant data and insight reports demonstrate that complaints have clustered around damp/mould and repeated access arrangements; and expectation of scope of repairs continue to rise locally and nationally. The introduction of the Hazards in Social Housing (Prescribed Requirements) (England) Regulations 2025 which came into force 27 October 2025 commonly known as "Awaab's Law"; plus, the national publicity campaigns are seen as a contributing factor around the surge in repairs demand and associated complaints regarding damp and mould. This should not by proxy be taken that properties are in poor condition, more so that tenants are more aware of their responsibilities, of the implications on their health for not reporting repairs and the ease of reporting repairs to the council.
17. NFDC prepared well for the new legislation and went a step further in planning to address all the 28 hazards contained within the legislation (currently with different implementation dates through 2026) in its current operating procedures, not just damp and mould. This has included faster triage and better resident liaison reduce re visits, speed access, and to cut avoidable costs. It also means maintaining uplifted responsive repairs budgets including funding new Resident Liaison Compliance Officer capacity to unblock access and meet statutory health and safety compliance cycles including gas, electrical, and water hygiene etc.
18. A key driver therefore of HRA costs remains cyclical/responsive repairs, where there is less opportunity to control the increasing demand pressures as indicated. It is also the priority landlord service needed and requested by our tenants and leaseholders to keep them safe and satisfied within their own homes and communities.
19. The Major Repairs programme is also a significant proposed programme which includes an increase in gas boiler replacements, and a replacement windows and doors programme to keep on track for the Council's ambition to have all its homes certified EPC C by 2030.
20. This ambition has been demonstrated in our housing service always seeking to pro-actively achieve excellence in how we have supported our tenants and their homes. The results of 81% tenant satisfaction for this service, and the high performing service KPIs which demonstrate that despite the increasing service pressures, including costs of employees and materials that continue to rise above inflation, we can demonstrate and provide assurance of our good performance through our performance data and governance.

21. This includes working with our housing tenants to understand their needs and provide high quality service standards in line with the government's regulatory regime.
22. Whilst we welcome the opportunities and challenges provided by new legislation and improved standards the proposal to rent setting enables the council to continue to deliver to required standards and maintain its current high levels of regulatory compliance, health and safety, and tenant satisfaction over the medium term.
23. The additional rental income will also fund significant Home Energy Improvement programmes and carbon reduction impacts as costs are likely to be higher at the outset of the programme.
24. Improvements targeted in specific areas, where more challenging to improve property types are difficult to improve, such as non-traditional properties given our generally aged housing stock which puts pressure on the HRA in the medium term and longer term. Due to the geographical spread and type of housing stock with mixed fuel types including oil burning technologies where certain rural areas are off-gas and in a few cases off-grid adding complexity and cost to planned improvements
25. There are on-going cost pressures in labour and materials which outstrip inflation targets and remain volatile within the economy. The continued support for the funding of Disabled Facilities Grants in the Council Owned stock to support vulnerable and disabled tenants to remain in their own homes is one example where the service has reported an average of 30% cost increases over the last year by specialist contractors and the price of equipment and building works etc. The council nevertheless remains committed to providing this service for the reasons mentioned.

Service Charges – Hostels & Flat Accommodation

26. Service Charges are currently used by the Council as a method to recover Council Tax and domestic and communal energy costs from tenants where their personal usage costs are charged directly to the Council by the respective billing organisations. Service Charges are also used to recover some aspects of equipment provision, cleaning and communal heating and lighting costs from tenants, which are also incurred in their respective properties.
27. Around 1,300 tenants and leaseholders pay service charges to the Council and a review of costs and rates commences at the end of each calendar year. All service charges are revised and disaggregated each year to reflect accurate charges for tenants and leaseholders based on actual costs, and this year's exercise has been used to

inform this report, and service charges are then adjusted flexibly each year in line with these changes.

28. For 2026/27 total service charge income will increase by £69,000, largely reflecting additional properties arising from the Development Programme.

Garage Rents

29. It is proposed that garage rent charges are increased in 2026/27 by 4.8% (£0.68 per week) to £14.93 per week, plus VAT where applicable.

Planned Maintenance & Improvement Works

30. The report proposes total budgetary provision of £13.657 million for planned maintenance and improvement works to houses and estates. This, together with budgetary provision of £5.636 million for reactive maintenance works means that, in total, £19.293 million will be spent on tenants' properties in 2026/27. Details of the proposed works for 2026/27 and an indication of proposals for the following two years are set out in **Appendix 2**.

Fire Risk Assessment Works

31. Between 2022/23 and 2025/26 the Council will have spent £6.8 million on fire safety and statutory compliance matters. Funding of £1.3 million has been allocated for 2026/27, including £850,000 rephased from 2025/26, to continue the requirements to address identified actions from Fire Risk Assessments (FRAs) in flat blocks.
32. Rephasing includes two existing buildings covered within the scope of project work which met the requirements of Building Regulations at the time of construction. These buildings have been assessed by our commissioned fire engineer with new fire safety strategies devised to support the continuation of 'defend in place'. The scope of work is intended to support fire safety improvements as a betterment to those in place at the time of construction, alongside wider modernisation improvements to common space, external façade and roof covering replacement which have come to the end of their serviceable life. More urgent work to deal with risk mitigation has already taken place. These buildings are inspected weekly by our building safety officers.

Home Energy Improvement Programme

33. In 2023/24 work to establish the future upgrade programmes to deliver all homes to EPC C by 2030, and net zero carbon by 2050 were established. Measures required to each home within the Council stock to meet these targets is known and estimated costs applied up to 2050. 2024/25 was considered a transition year where planning the upgrade strategy began to be overtaken by the delivery of increased retrofit activity. Funding of £3 million is proposed for 2026/27, but total expenditure up to 2030 is likely to be £15 million, with a further £115 million required to meet net zero targets by 2050.
34. Expenditure in the next 3 years will likely be offset by securing a grant of up to £824,000 from the Social Housing Decarbonisation Fund (SHDF).

HRA Income 2026/27

35. Estimated total income for 2026/27 is £1.851 million higher than the original budget for 2025/26. The income variations from the 2025/26 approved budget are set out below:

	Change £000	Paragraph
Dwelling Rents	(1,929)	36
Non – Dwelling Rents	10	37
Service Charges	(69)	38
Contributions to Expenditure	51	39
Other Income	86	40
Total	<u>(1,851)</u>	

36. **Dwelling Rents (£1.929 million increase)** – The proposed budget for 2026/27 includes the benefits of £1.640 million arising from the proposed 4.8% rent increase, £267,000 from a net increase in property numbers from the development programme, including new shared ownership properties, offset by Right to Buy Sales and £22,000 from flexible rent and capped rent changes.
37. **Non - Dwelling Rents (£10,000 reduction)** – This income is derived from garages and rents of other housing land. The overall reduction reflects a £74,000 impact of reduced lettings due to voids and an ongoing project to provide a full options appraisal of all sites, offset by a £34,000 benefit arising from the proposed 4.8% increase in charges and increased non garage rent income of £30,000.
38. **Service Charges (£69,000 increase)** – The service charges proposals detailed in paragraphs 26 to 28 will result in increased

income of £69,000 largely due to additional properties arising from the Development Programme.

39. **Contributions to Expenditure (£51,000 reduction)** – This reduced income reflects the removal of specific Government grant that was provided in 2025/26 as a contribution towards the estimated £200,000 additional costs arising from the National Insurance changes announced in the 2025/26 Budget.
40. **Other Income (£86,000 reduction)** – Interest earnings are anticipated to reduce by £114,000 due to lower interest rates and the use of capital receipts to fund the capital programme. Administration income has reduced by £20,000 due to lower predicted numbers of Right to Buy Sales. These reductions are offset by an increase of £48,000 in the Shared Amenities contribution from the General Fund, to cover inflationary increases in costs and increases in expenditure on grounds maintenance budgets, as detailed in paragraph 43.

HRA Expenditure 2026/27

41. Budgeted operating expenditure for 2026/27 is £957,000 higher than the approved budget for 2025/26. After allowing for depreciation charges and the removal of the non-recurring 2025/26 transfer of £150,000 from reserves for specific earmarked projects, surplus resources available for making principal repayments on borrowing have increased by £744,000 to maintain a balanced Housing Revenue Account for the year. The major variations are set out below:

	Change £000	Paragraph
Cyclical/Reactive Maintenance	554	42
General Management	179	43
Grounds Maintenance and Trees	176	44
Housing Schemes and Temporary Accommodation	106	45
Capital Financing Costs - Interest	(58)	46
Operating Expenditure	<u>957</u>	
Contribution to Capital – Supporting Housing Strategy	0	47
	<u>957</u>	
Capital Financing Costs – Principal	744	48
Total	<u>1,701</u>	

42. **Cyclical/Reactive Maintenance (£554,000 increase)**– Increased maintenance budgets are principally due to pay and prices increases of £225,000 and an increase of £211,000 on cyclical

maintenance, due to the expansion of lead/legionella testing (£131,000), increased stock condition surveys (£45,000) and additional window cleaning costs (£35,000). In addition, a review of the Vehicles programme has increased allocations by £123,000.

43. **General Management (£179,000 increase)**- Supervision and Management budgets will increase due to pay and prices increases of £85,000. Budget provision has been added for a Waste Advisor to support the waste roll out to tenants (£21,000), for additional cleaners for new properties provided by the Development Programme (£30,000) and for additional resources to deal with the impact of increased housing regulations (£120,000). These increases have been offset by various other net reductions, mainly staff allocations, of £77,000.
44. **Grounds Maintenance and Trees (£176,000 increase)** – An increase in budgets is due to pay and prices increases of £23,000 and an increase of £153,000 in charges from the Grounds Maintenance team, principally due to the outcome of a review of vehicle cost allocations. These increases are partially offset by an increase in the Shared Amenities Contribution from the General Fund.
45. **Housing Schemes and Temporary Accommodation (£106,000 increase)** – Additional costs are principally due to inflation of £15,000, an increase of £65,000 in the cleaning budget for additional properties arising from the Development Programme and increased allocations charges of £28,000, principally following a review of the Vehicle allocation methodology.
46. **Capital Financing Costs Interest (£58,000 reduction)** – Capital financing costs have reduced by £58,000. This is principally due to a reduction of £116,000 following the repayment of the next instalment of the settlement borrowing in March 2026. Additional interest costs of £337,000 are expected on forecast new borrowing for the proposed 2026/27 capital programme but these are largely offset by reduced costs due to less borrowing than expected in 2024/25 and 2025/26 and due to lower interest rates than budgeted on actual borrowing taken out during 2025/26.
47. **Contribution to Capital - Supporting Housing Strategy (£0 increase)**– This budget is the prescribed calculation of dwellings depreciation that needs to be charged to the Housing Revenue Account and is used to part fund the capital programme. The figure is based on a combination of factors including property valuation, component costs and remaining component life. While materials costs have increased this impact has been offset by a reduction in the property valuation element. The budget will remain at £10.2 million.

48. **Capital Financing Costs – Principal (£744,000 increase)**– After allowing for transfers from reserves of £150,000, the Council is required to set a balanced budget for the year. Increased operating income of £1.851 million exceeds estimated increased operating expenditure of £957,000, increasing the annual amount available for repaying principal on borrowing by £744,000. This results in a total repayment amount available of £3.769 million, which means that there will not be sufficient resources to enable the maturing loan of £4.1 million to be repaid in full during 2026/27 and therefore additional replacement borrowing of £331,000 will be required.

HRA Reserve Balance

49. The HRA Reserve balance as at 1 April 2025 was £1 million. This is a prudent level and meets with good governance practice.
50. The original 2025/26 HRA budget showed a break-even operating position, with no proposed reserves transfers. A financial update report for the year was presented to Cabinet on 4 February 2026, which included forecast variations to the year end. In accordance with current policy, any surplus or deficit for the year will be balanced by a transfer to or from the Acquisitions and Development Reserve, but assuming a break-even HRA position for the year 2025/26, this will result in a year-end balance of c£4.8 million as at 31 March 2026, after funding the capital programme.
51. The proposed HRA budget for 2026/27 currently shows a break-even position and therefore the estimated Housing Revenue Account balance (cash reserve) as at 31 March 2026 and 31 March 2027 will be £1 million.

30 Year Business Plan

52. In 2024/25 the Council, with the assistance of an external consultant produced an initial 30-year HRA business plan projection, a summary of which was included in the budget report last year. This projection was further refined during the last year which will inform a formal plan with an agreed strategic direction for stock investment and new housing development. A Briefing document is attached at **Appendix 5**.

Capital Programme

53. The proposed Housing Public Sector capital expenditure programme for 2026/27 totals £31.550 million. The detailed programme and anticipated funding are set out over the page with indicative details for future years in **Appendix 4**.

	Original 2025/26 £000	Latest 2025/26 £000	Original 2026/27 £000
Proposed Expenditure			
Fire Risk Assessment Works	1,500	650	1,300
Major Structural Refurbishments	0	921	0
Planned Maintenance & Improvements	11,100	10,752	10,700
Home Energy Improvement programmes	1,870	2,070	3,000
Estate Improvements	200	200	400
Disabled Facilities Adaptations	950	950	950
Development Strategy	15,200	15,200	15,200
TOTAL	30,820	30,743	31,550
Funded by			
Revenue	10,200	10,000	10,200
Capital Receipts	4,000	7,200	6,080
Acquisitions and Dev. Reserve	950	950	950
Government Grant	2,805	4,326	275
External Borrowing	12,865	8,267	14,045
TOTAL	30,820	30,743	31,550

54. Significant works to properties, including mandatory compartmentation and new fire doors, are being carried out following detailed Fire Risk Assessment surveys. Funding of £1.3 million is proposed for 2026/27, but this includes £850,000 rephased from 2025/26.
55. The Major Repairs budget has been set at £10.7 million. Details of the proposed programme are set out in Appendix 2 but include an increase in gas boiler replacements, and a catch-up programme of new window and door replacements which are required for the Council's drive to have all its homes certified EPC C by 2030.

56. Funding of £3.000 million is proposed in 2026/27 to continue works for Home Energy Improvements to the Council's housing stock and take advantage of any government grant funding available, as covered in more detail in paragraphs 33 and 34. Insulation programmes will be continued in 2026/27 to enhance the energy rating of properties and reduce fuel bills.
57. The Council's current Housing Strategy and Corporate Plan prioritise the delivery of new affordable housing homes covering the period 2018 - 2026. The proposed capital programme for 2026/27 includes £15.200 million to be invested in additional homes. Expenditure is also expected over the period post 2026/27 through to the end of 2029, which has been accounted for in Appendix 3 with similar levels of proposed expenditure.
58. In summary, significant financial commitments are needed to deliver the Council's priorities including our capability to deliver the HRA Business Plan:
- More affordable and sustainable homes
 - Stronger and more resilient communities
 - Changes to realise opportunities including IT Transformation and new asset management/repairs system (MARS)
 - Maintaining high quality and value for money services, monitoring, scrutiny, and collaboration
 - Mitigate Increasing Challenges and Risk in delivering Landlord services to vulnerable tenants with increased legislative requirements including building safety hazards and housing stock improvements with a focus on health and safety.

HRA Medium Term Financial Position

59. Attached at **Appendix 3** is an indication of HRA budgets for two years post 2026/27 and is included to enable decisions for 2026/27 to be made in the context of affordability for the medium term. With the continuation of a significant Home Energy Improvement programme and the increasing expenditure required to maintain the aging stock the HRA is placed under continuing significant pressure.
60. Based on continuing rent increases of CPI+1% alone, it currently shows an estimated operating deficit of c£1.1 million in 2027/28 and £0.6 million in 2028/29. These figures exclude the impact of additional income from implementing rent convergence to close the gap over the medium term, whilst concurrently expenditure and income budgets will be reviewed for those years with a view to further reducing the gap, but any remaining deficit will be closed by reducing the loan principal amount repaid to the externally borrowed commitment level of £4.1 million. Significant future costs of the

Major Repairs Programme and the Home Energy Improvement requirements will require both revenue and capital programme spend priorities to be reconsidered in accordance with the Corporate Plan priorities.

Section 25 Statement: Robustness of Estimates and Adequacy of Reserves

61. There are a range of safeguards in place to help prevent local authorities overcommitting themselves financially. These include the Chief Finance Officer's duty to report on the robustness of estimates and adequacy of reserves (under section 25 of the Local Government Act 2003) when the authority is considering its budget requirement 41 (England and Wales).

Section 25 Statement from the Section 151 Officer

62. The 2026/27 budget has been constructed based on all latest information and considers all factors that will have an implication to 2026/27 that are in the council's control. Budget variations in relation to levels of inflation have been considered and included within the budget where appropriate. Income projections are sensible and not overinflated, and the full cost of the council's staffing establishment is based on latest pay assumptions and is calculated in an appropriate level of detail. Senior Housing Management across the council engage with the council's central finance team on the preparation of the detailed budgets, and only budgets that have the backing of senior management make it through to this budget setting report for consideration by members of the Cabinet and ultimately Council.
63. There are areas of uncertainty that the council needs to be particularly mindful of, affecting the budget assumptions over the medium-term. These include (but are not entirely limited to) the following:
 - a. impact of resources required to support LGR preparations
 - b. pay award increases
 - c. materials and suppliers' costs
64. In setting the Housing Revenue Account (HRA) Budget for 2026/27, the council is contributing to the financing of the capital programme. Use of reserves is supplemented where appropriate with borrowing, and an assessment is made on the affordability and proportionality of financing charges to the revenue budget.

65. The Housing Revenue Account reserve at £1 million and Acquisitions and Development Reserve, estimated at £4.8 million as at 31 March 2026, are considered to be adequate for 2026/27 considering the overall size of the council's capital and revenue budgets. Variations in actual performance as compared to budget assumptions are inevitable in an organisation with a Housing turnover as large as the council's, especially when also considering the diverse range and complexities of Housing services and differing levels of demand on those services throughout a fiscal period. Reserves exist to provide a cushion for these variations.
66. The proposal to use £950,000 of the Acquisitions and Development Reserve balance to support the delivery of the 2026/27 capital programme is considered appropriate and acceptable, both in the context of Local Government Reorganisation and the overall HRA business plan.
67. The council maintains a suitable level of liquidity regarding its overall cash balances in order to service the day-to-day requirements of the council. In order to maintain its professional investor status a minimum of £10 million must be available. Full details on how the council manages its borrowing, investments and risks can be found in the council's Treasury Management Strategy 2026/27 report.
68. As the council's Chief Finance Officer, I am satisfied on the robustness of the estimates as included in the budget for 2026/27 and MTFP to 2028/29 and I am able to provide assurance on the adequacy of reserves held by the council.

Corporate plan priorities

69. People Priority 1: Helping those in our community with the greatest need: Provide more quality, temporary accommodation for single people and families and work with our partners to tackle homelessness.
70. People Priority 3: Meeting housing needs: Provide increased numbers of affordable homes by 2026. Improve the energy efficiency of over 3,200 council houses by 2030. Work with our housing tenants to understand their needs and provide high quality service standards in line with the government's new Social Housing Charter and regulatory regime.

Options appraisal

71. All spending options were considered, including postponing required capital works, but there is a risk that revenue spending will increase fixing end of life components.
72. Due to the age of a significant number of gas boilers, where parts are no longer available, there are very few alternative options to consider. Phasing of boiler replacements over a number of years has already taken place, following the obsolescence of major parts in October 2024.

Consultation undertaken

Tenants' Views

73. The Tenant Involvement Group (TIG) recognise the Council are in a strong position with an appropriately considered and prudent Housing Revenue Account (HRA) report and budget for 2026/27. It's important that the HRA is considered with tenants needs, desires and expectations in mind, and the TIG have been satisfied that the budget and associated report has given due consideration to this fact, having had the ability to review and scrutinise the report alongside senior officers of the Council.
74. The tenant's view is that the proposed rent increase is reasonable, alongside the anticipated and proposed rent convergence levels that are being considered by Government. The TIG also support the continued service charge recommendations, with service charges apportioned to tenants based on actual charges incurred by the Council.
75. Tenants appreciate the Council's commitment to our homes, specifically repairs and maintenance budgets, ensuring the safety and quality of homes, alongside the programme of improvements to homes including warmer, more energy efficient homes.
76. The TIG recognise the diverse tenant population and that the proposed rent increase will affect all tenants in different ways. Whilst the Council have given due consideration to this and are looking to ensure a balanced approach to tenants needs, communities and homes, the TIG noted concern about the impact of increased rents on those tenants affected by pressures on the cost of living. This is especially true for those whose income is not increasing in line with the proposed rent increase. The TIG noted that the council already offer a wide range of support and pointed to the Council's publicised 'cost of living' help and support. However, the TIG also recommended a review of support that can be provided to our Housing Tenants, and consideration of a specific Poverty Strategy.

77. As a result of the TIGs scrutiny of the proposed budget, the TIG are able to agree with the proposals, and support the recommendations within this report.

Housing & Communities Overview and Scrutiny Panel Comments

78. The Housing and Communities Overview and Scrutiny Panel considered the proposed HRA budget and housing public sector capital programme for 2026/27 and supported the recommendations.

Financial and resource implications

79. Attached at **Appendix 3** is an indication of HRA budgets for two years post 2026/27 and is included to enable decisions for 2026/27 to be made in the context of affordability for the medium term. With the onset of a significant Home Energy Improvement programme and the increasing expenditure required to maintain the aging stock the HRA is placed under continuing significant pressure. Whilst these budgets will be amended in future years, it shows an estimated operating deficit of c£1.1 million, before the calculation of any additional income achieved through rent convergence. Significant future costs of the Major Repairs Programme and the Home Energy Improvement requirements will require both revenue and capital programme spend priorities to be reconsidered in accordance with the Corporate Plan priorities.

Legal implications

80. The recommended capital and revenue funding levels for 2026/27 ensure ongoing compliance with legislation and guidance set by central government. Maintaining good quality and safe housing mitigates housing disrepair claims and other health and safety related claims.

Risk assessment

81. Risks related to safety compliance, maintaining the decent homes standard and maintaining the momentum toward achieving EPC C and net zero have been addressed by the recommended revenue and capital programmes.

Environmental / Climate and nature implications

82. The capital works programme continues to provide more sustainable measures to improve the thermal efficiency of Council housing stock, through more efficient window replacement programmes, insulation, boiler replacements and air source heat pumps. Following the previous work of the Greener Housing Task and Finish Group and the Greener Housing Strategy, the Council is committed to undertaking

more sustainable measures year on year to reach the target of all properties having a minimum energy efficiency rating of EPC C, which will require in excess of £6 million over the next 3 years to fund the initial phases of the work, and up to a further £9 million by 2030.

83. In the long-term, should decarbonisation of the entire stock still remain a priority it will require the HRA to fund an additional £115 million of expenditure. This will present significant challenges to the HRA, and future priorities and strategic choices will need to be carefully considered. Whilst meeting net zero will require some carbon off-setting in due course the programme will remove several thousand tonnes of carbon emissions each year.
84. Initially, we remain focussed on Home Energy Improvement programmes across the stock, targeting the worst performing properties, which are often off the gas network and in rural areas.
85. All products used in the repair, maintenance and improvement of Council homes are selected to ensure the minimum impact upon the environment, are sourced from recycled materials where possible and at the same time balance the need to improve the energy efficiency of tenants' homes in order to meet the requirement for thermal efficiency under the Decent Homes Standard and meet specified and legal safety standards.

Equalities implications

86. All equality and diversity implications will be considered at every stage of the process of commissioning and carrying out planned maintenance, improvement and cyclical maintenance works. In addition, any contractor used for works will have been assessed, as part of the process in becoming an approved NFDC contractor, in respect of their adherence to equality and diversity principles.
87. The HRA funding priorities support the funding and commissioning of necessary works with a view to improving building quality and safety, and the energy efficiency performance of the council stock, which supports vulnerable people reduce household bills at a time of cost-of-living pressures, and which reduces disrepair and the exposure to damp and mould tackling health and housing inequalities.
88. The Tenancy Account Team, which incorporates a dedicated support worker, will continue to support and signpost tenants experiencing difficulties paying their rent, working collaboratively with community support networks.
89. The continued support for the development and acquisitions programme in 2026/27 addresses housing need issues and increases the supply of properties in areas where there is high demand for

social housing, and which supports the Council's aims of tackling homelessness in vulnerable communities.

90. The continued funding of Disabled Facilities Grants in the Council Owned stock supports vulnerable and disabled tenants to remain in their own homes or provides suitable alternative housing options for applicants and existing tenants whose needs cannot be met by their existing accommodation.

Crime and disorder implications

91. Many aspects of work identified within this report will improve the security of tenants' homes and improve the condition and aesthetics of neighbourhoods.

Data protection / Information governance / ICT implications

92. There are significant IT systems and change projects to fund and implement in 2026-27 for housing services, including a new council wide customer service IT system as a part of the Transformation programme, and a new asset management/repairs system (MARS) project for housing fully funded by the HRA.

Conclusion

93. The proposed uplifted rent (in line with government guidelines) and service charges, as well as partial re-financing of the HRA settlement loan enable expenditure levels on housing maintenance and capital programmes to be maintained. This increased expenditure ensures compliance with Housing Regulatory Standards. The proposed budget is supported with 30-year projections and potential for fiscal borrowing and debt increases to accommodate the programme.

Appendices:

Appendix 1 – Summary HRA
Appendix 2 – Maintenance Programme
Appendix 3 – 3 Year HRA MTFP
Appendix 4 – Capital Programme
Appendix 5 – 30 Year Business Plan
Briefing Document.

Background Papers:

HOUSING REVENUE ACCOUNT BUDGET

	2025/26 £'000	2026/27 £'000	Variation £'000	Para
INCOME				
Dwelling Rents	-34,230	-36,159	-1,929	36
Non Dwelling Rents	-735	-725	10	37
Service Charges	-1,142	-1,211	-69	38
Contributions towards Expenditure	-128	-77	51	39
Interest Receivable	-418	-304	114	40
Sales Administration Recharge	-33	-13	20	40
Shared Amenities Contribution	-361	-409	-48	40
TOTAL INCOME	-37,047	-38,898	-1,851	
EXPENDITURE				
Repairs & Maintenance				
Cyclical Maintenance	2,234	2,557	323	42
Reactive Maintenance - General	3,520	3,569	49	42
Reactive Maintenance - Voids	1,885	2,067	182	42
General Management	8,288	8,467	179	43
Grounds Maintenance and Trees	1,087	1,263	176	44
Housing Schemes and Temporary Accommodation	1,200	1,306	106	45
Provision for Bad Debt	150	150	0	
Capital Financing Costs - Interest/Debt Management	5,608	5,550	-58	46
TOTAL EXPENDITURE	23,972	24,929	957	
HRA OPERATING SURPLUS(-)	-13,075	-13,969	-894	
Contribution to Capital - Supporting Housing Strategy	10,200	10,200	0	47
Capital Financing Costs - Principal	3,025	3,769	744	48
HRA Total Annual Surplus(-) / Deficit	150	0	-150	
Use of Reserves for Major Projects	-150	0	150	
HRA TOTAL ANNUAL SURPLUS(-) / DEFICIT	0	0	0	

2026/27 - 2028/29 MAINTENANCE BUDGETS

CYCLICAL MAINTENANCE	2026/27	2027/28	2028/29
External Cleaning and Decoration	630,500		
Appliance servicing (including gas, oil, solid fuel)	1,171,850		
Lift Servicing	103,000		
Fire Alarm Servicing	78,500		
Portable Appliance Testing	4,500		
Fire Risk Assessments	29,000		
Air Source Heat Pump Servicing	17,500		
CCTV, Laundry & Door Entry Servicing	64,000		
Legionella/Lead Testing	165,000		
Emergency Lighting	110,230		
Automatic Door Servicing	32,000		
Window Cleaning	55,000		
Alarms & Telecommunications	51,500		
Stock Condition Surveys	45,000		
TOTAL CYCLICAL MAINTENANCE BUDGET	2,557,580	2,634,310	2,713,340

PLANNED MAINTENANCE & IMPROVEMENTS	2026/27	2027/28	2028/29
Heating Replacement Gas	1,915,160		
Electrical Rewiring	711,400		
Sheltered Schemes Minor Works	227,900		
Low Maintenance Eaves	460,000		
External Door Replacements	710,000		
Pitched Roofing	1,045,000		
Repointing	10,000		
Window Replacements	1,000,000		
Kitchen Refurbishments	1,250,000		
Drainage	100,000		
Structural Works	300,000		
Asbestos surveys and removal	100,000		
Garages	200,000		
Bathroom Refurbishments	350,000		
Insurance Work	10,000		
Water Main Renewals	40,000		
Miscellaneous	2,270,540		
TOTAL PLANNED MAINTENANCE & IMPROVEMENT BUDGET	10,700,000	11,021,000	11,351,630

ESTATE IMPROVEMENTS	2026/27	2027/28	2028/29
Provision of estates works and paving	400,000		
TOTAL ESTATE IMPROVEMENTS BUDGET	400,000	400,000	400,000

TOTAL FORECAST MAINTENANCE EXPENDITURE	2026/27	2027/28	2028/29
TOTAL EXPENDITURE	13,657,580	14,055,310	14,464,970

MEDIUM TERM FINANCIAL PLAN - HOUSING REVENUE ACCOUNT

	Budget 2026/27 £'000	Forecast 2027/28 £'000	Forecast 2028/29 £'000
INCOME			
Dwelling Rents	-36,159	-38,121	-40,365
Non Dwelling Rents	-725	-747	-769
Service Charges	-1,211	-1,247	-1,285
Contributions towards Expenditure	-77	-77	-77
Interest Receivable	-304	-200	-141
Sales Administration Recharge	-13	-13	-13
Shared Amenities Contribution	-409	-421	-434
TOTAL INCOME	-38,898	-40,827	-43,084
EXPENDITURE			
Repairs & Maintenance			
Cyclical Maintenance	2,557	2,634	2,713
Reactive Maintenance - General	3,569	3,676	3,786
Reactive Maintenance - Voids	2,067	2,129	2,193
General Management	8,467	8,721	8,983
Grounds Maintenance and Trees	1,263	1,301	1,340
Housing Schemes and Temporary Accommodation	1,306	1,345	1,386
Provision for Bad Debt	150	150	150
Capital Financing Costs - Interest/Debt Management	5,550	6,171	6,880
TOTAL EXPENDITURE	24,929	26,127	27,430
HRA OPERATING SURPLUS(-)	-13,969	-14,700	-15,654
Contribution to Capital - supporting Housing Strategy	10,200	10,500	10,800
* Capital Financing Costs - Principal	3,769	5,301	5,469
HRA Total Annual Surplus(-) / Deficit	0	1,101	615
Use of Reserves for Major Projects	0	0	0
HRA TOTAL ANNUAL SURPLUS(-) / DEFICIT	0	1,101	615
OPTIONS IDENTIFIED TO CLOSE THE DEFICIT			
General Efficiency and Channel Shift/Rent Convergence		200k-500k	200k-500k
* Loan Re-financing		upto £4.1m	upto £4.1m

CAPITAL PROJECTS REQUIREMENTS WITH FINANCING

PUBLIC SECTOR HOUSING CAPITAL PROGRAMME

Fire Risk Assessment Works

HRA

1,300,000

0

HRA - Major Repairs

HRA

10,700,000

10,980,000

11,350,000

Home Energy Improvements

HRA

3,000,000

3,000,000

3,000,000

Estate Improvements

HRA

400,000

400,000

400,000

Council Dwellings - Strategy Delivery

HRA

15,200,000

15,200,000

15,200,000

Disabled Facilities Grants

HRA

950,000

950,000

950,000

31,550,000

30,530,000

30,900,000

2026/27 PROJECT FINANCING £

Grants & Conts.

Cap Receipts /
DC's

Internal/External
Borrowing

HRA

HRA Reserves

1,300,000

0

500,000

10,200,000

275,000

2,725,000

400,000

0

0

6,080,000

9,120,000

950,000

275,000

6,080,000

14,045,000

10,200,000

950,000

31,550,000

HRA 30 year business plan briefing document

1. Introduction

This note has been prepared by Housing Finance Associates, using information supplied by officers at New Forest District Council about the authority's housing revenue account (HRA). It presents an updated baseline position, which has been prepared using working papers and assumptions agreed with the authority following its budget-setting process.

The projections summarise expenditure, investment, capital financing and borrowing in respect of council housing over a 30 year period, starting in 2024/25 and the authority's best available data and assumptions. They allow for inflationary pressures to impact on budgets and programmes from 2026/27 onwards. The projections also assume that National rent policy will permit maximum rent increases of CPI +1% until 2035/36, which is in line with a recent announcement by government.

The government has recently consulted on reintroducing rent convergence for existing social rent tenancies. Alongside the baseline we have included an indication of the potential effects of two scenarios for reintroducing rent convergence from 2026/27.

We recommend that the authority reviews the risks facing its HRA regularly, with a view to identify the effects of emerging situations at an early stage, testing its response and taking appropriate action to eliminate or mitigate the risk.

2. Baseline projections

2.1. Baseline assumptions

The baseline assumptions reflect the projected 2024/25 revenue outturn, 2025/26 budget and medium term projections for capital and revenue prepared by the authority's finance team. These update the draft budgets that were reported to Cabinet in the annual budget-setting report from February 2025. Other information and assumptions we have used in preparing this baseline projection include:

- Updated information on the authority's programme for developing and acquiring new dwellings over the medium term.
- An expectation that growth in General Management budgets in 2025/26 to support the authority's transformation programme will be removed from 2027/28 onwards.
- Data from the right to buy pooling returns that the authority submits to MHCLG
- We have assumed that the authority sold 25 homes under the right to buy in 2024/25 and sells 40 homes in 2025/26, while it processes an influx of applications that followed publication in October 2024 of the government's plans to reform the Right to Buy and reduce discount levels. From 2026/27 onwards we have allowed for 10 to 11 sales pa.
- The authority aims to maintain a minimum HRA balance of £1.000m, adjusted for inflation
- Any sums generated by the HRA that exceed the minimum balance are made available to finance the capital programme or to repay debt
- Actual rents increase at the maximum rate currently permitted by the rent standard. The maximum rent increase for existing tenants in 2025/26 has been set at 2.7%. Under a recent announcement by government, increases of CPI +1% are expected to apply until 2035/36. We have made the prudent assumption that rent increases will be limited to a CPI uplift from April 2036.
- Formula rents increase at CPI +1% until 2035/36, in line with the government's announcement. From 2036/37 onwards we have assumed that formula rents increase in line with CPI.
- In 2024/25 the authority re-let 5.5% of its social rent stock (282 units) at formula rent, with future relets in the same proportion. A small number of these dwellings (6 pa) are also re-let with an additional 5% rent flexibility charge, which is permitted under the rent standard.
- Depreciation costs have been estimated in line with the authority's budget, uplifted for inflation at CPI.
- Inflation assumptions have been updated to reflect the May 2025 Monetary Policy report from the Bank of England and applied as follows:
 - CPI at 3.25% in the final quarter of 2025 and 2.0% in the final quarters of 2026 and 2027. These rates have been used to reflect underlying inflation for 2026/27, 2027/28 and 2028/29 respectively. From 2028/29 onwards we have assumed CPI runs at 2% pa.
 - RPI tracks at CPI +1%
 - General management and special management costs increase by underlying CPI.
 - Building costs increase at RPI. This affects spending projections for day to day repairs and maintenance, major works to existing homes and the provision or acquisition of new homes.
 - Other costs in the capital programme have been inflated by CPI.
- The baseline allows for the HRA to develop or acquire 445 new homes between 2024/25 and 2034/35.

- Major works and component replacements are treated as 100% variable from 2027/28. These costs have an element that flexes to reflect increases and reductions in the housing stock.
- At the start of the planning period HRA debt includes internal borrowing from the Council of £9.812m.
- The projections assume a pooled interest rate of 4.8% would apply to new loans in 2024/25 and 2025/25, reducing to 4.2% for 2026+/27 and 2027/28, then a rate of 3.8% from 2028/29 onwards.

In preparing this projection we have assumed that the HRA would attempt to repay any additional external borrowing that it undertakes as quickly as possible. Our reason for making this assumption is that it gives a clearer indication of how well the HRA can service and repay any borrowing that is required to deliver its long term capital programme. Any actual borrowing undertaken by the authority would be subject to the prevailing market conditions and guidance received from the authority's treasury advisors.

2.2. Gaps in the data and potential risks

Note that there are gaps in the data available to the authority, which have required us to make assumptions about future expenditure in key areas. The two principal gaps we have identified relate to:

- The cost of unforeseen works that may be required when investing in the authority's existing housing stock. We have included a contingency to allow for such works
- Lack of certainty around future National policies impacting on the Right to Buy, decarbonisation of the housing stock and associated funding. We have made prudent assumptions to accommodate these risks.

The profile of component replacements required for the existing stock is generated from the authority's stock condition data. We recommend continuing to update the modelling assumptions to accommodate new information from the stock condition data, as soon as it becomes available.

Other key risks include:

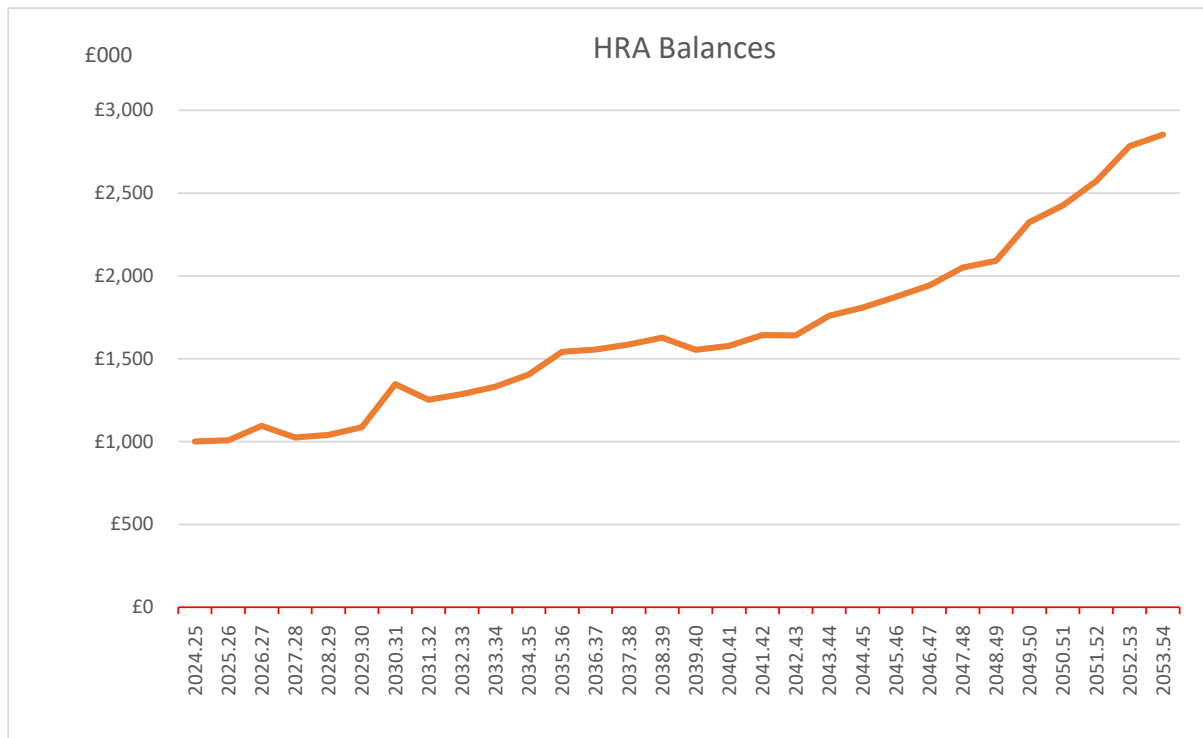
- fluctuations in the underlying rate of inflation, which can impact on both costs and income
- further constraint imposed on rent increases, whether by government or the authority itself
- increases in the costs of works and services that are not matched by increases in income
- changes to underlying interest rates

We recommend that the authority reviews the potential HRA impact of these risks regularly, as part of its early warning system. This will enable it to identify the effects of emerging situations at an early stage, test its response and take appropriate action to eliminate or mitigate the risk.

The effects of the baseline assumptions are shown in the following sections.

2.3. Baseline - revenue position

The chart below shows the authority's ability to maintain a minimum level of balances during the 30 year period covered by the baseline projection:

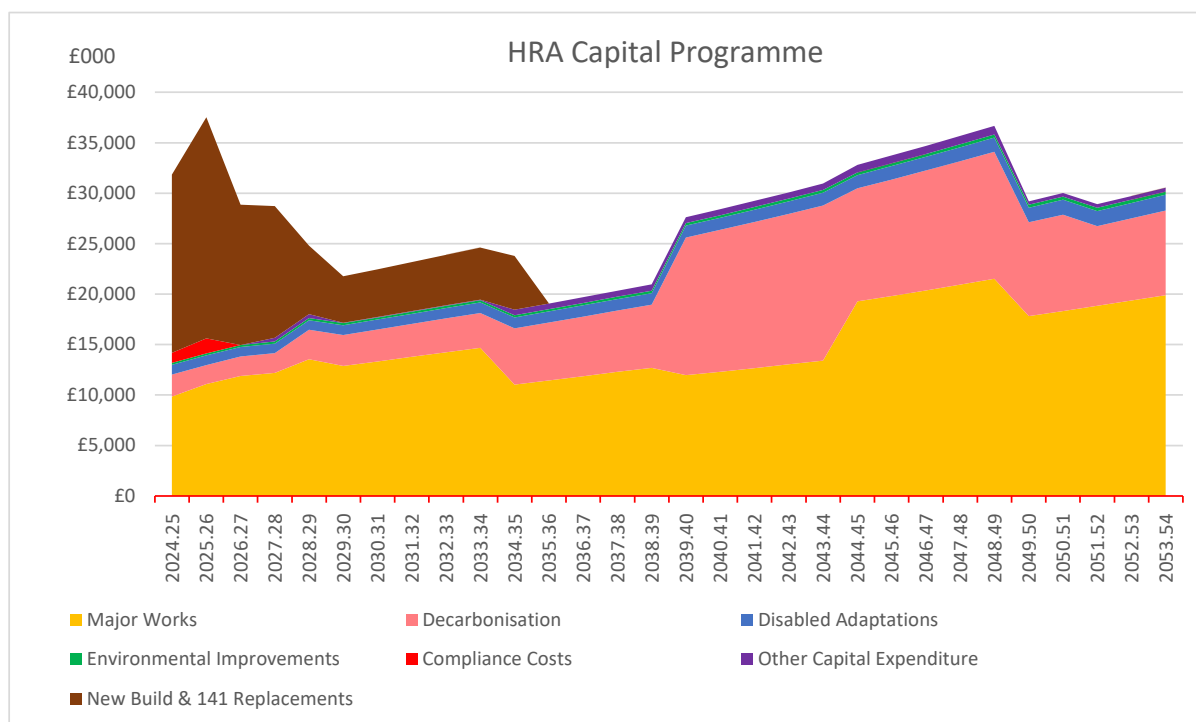


In this chart the orange line projects the cumulative HRA balance at the end of each year.

The authority maintains its minimum HRA balance of £1.000m (plus inflation) throughout the projections. During this period, any “spare” rents generated are used to pay for capital projects or to repay debt.

2.4. Baseline -capital programme

The next chart shows the scale and composition of the authority's projected capital programme:



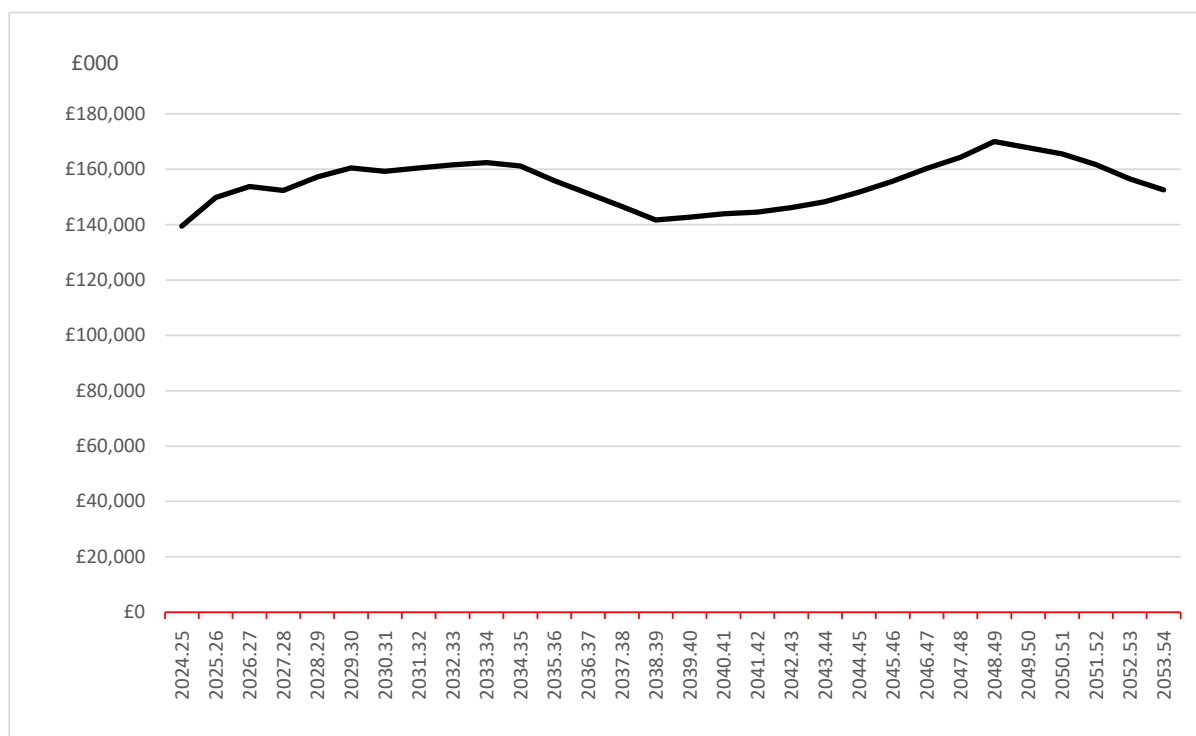
This projection includes a cautious 10 year programme for new build and stock purchase that produces 445 new properties between 2024/25 and 2034/35 (brown area). This reasonably represents the authority's commitment to increasing its housing stock, including a buyback programme, over the medium term.

The amber area allows for investment required on stock condition, based on the existing capital programme and stock condition data, with a contingency for (as yet) unidentified additional stock investment. The pink area shows an allowance for improving energy efficiency of existing homes to EPC level C standard by 2030, plus wider decarbonisation works. This allowance is based on the existing capital programme and stock condition data, with a contingency for additional decarbonisation works. The total amount of decarbonisation investment in the above chart is consistent with representative levels assumed by other local authorities.

The average cost of major works at current prices, £51,316 per dwelling (excluding decarbonisation works). The allowance for decarbonisation comes to £24,859 per dwelling at current prices over the same period. These allowances remain consistent with representative levels of investment in other authorities.

2.5. Baseline – debt

The next chart projects movements in the level of HRA debt during the planning period:



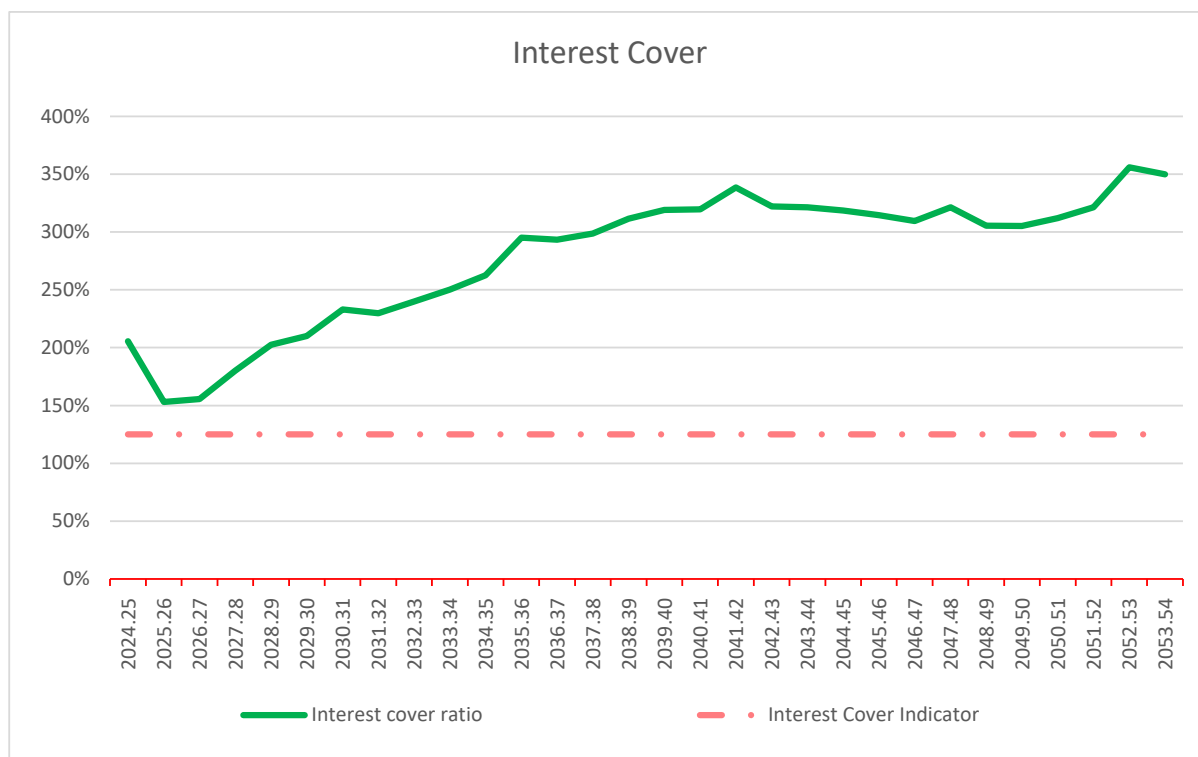
On these assumptions, the authority is unable to finance its capital programme entirely from its Major Repairs Reserve, revenue surpluses generated by the HRA and projected right to buy receipts. This causes the HRA to rely on borrowing to part-finance its HRA capital programme throughout the thirty year period.

HRA-related debt is projected to rise gradually over the medium term, reaching £162.384m in 2033/34. This coincides with a cyclical drop in major works investment. Debt then falls gradually until 2038/39 as the HRA takes the opportunity to repay debt. It then rises again, reaching a peak of £169.977m in 2048/49, when there is a further dip in the capital investment requirement and the authority is able to resume net debt repayments. It is noticeable that the authority is able to repay more debt than under previous projections. This is as a result of it generating additional rent, in line with the government announcement on rent increases.

Debt reaches its peak level in 2048/49, which is towards the end of the period covered. This means that the authority would be exposed to potential fluctuations in interest rates over the long term. It will therefore be important to continue reviewing the authority's options as the underlying economic circumstances evolve.

2.6. Baseline – affordability

Alongside our projection of the ability of the HRA to repay the debt required to finance the assumed capital programme, the chart below compares the level of operational surplus it generates with a standard indicator used by other landlords:



The green line in this chart shows the number of times the revenue HRA surplus is able to cover the assumed interest charges. When the green line goes down the authority's HRA is either making smaller surpluses or paying more in interest charges and the reverse is true when the green line goes up. The static dashed pink line suggests a minimum level of 125%, below which the authority would be at risk of being unable to cover its interest costs from its operating surplus.

This chart shows good levels of interest cover throughout the projections, which implies that the authority would be able to afford the level of borrowing required under the baseline assumptions. It is noticeable that performance against this metric levels off towards the end of the planning period. This reflects an expectation that some costs will rise at a faster rate than income over the long term, along with increases in borrowing to deliver the 30 year capital investment requirement.

Any increase in costs or loss of income would cause performance under this metric to deteriorate, unless the authority is able to make cost savings or generate additional income to compensate. The types of additional cost that the authority could encounter might result from higher inflation, increases in interest charges, commitments to spend more on providing additional or improved services, or additional costs to secure compliance with regulatory requirements. Any constraint on rent levels (whether imposed by government, or by a local decision to set rents at a lower level) would have a similar negative impact on interest cover performance.

Note that the requirement for borrowing is very sensitive to assumptions relating to cost levels, income from rents and other sources, plus interest rates. Initial sensitivity testing of these assumptions indicates that the authority should continuously seek to minimise costs and maximise income as a way of keeping debt levels down and minimising the associated risks.

2.7. Baseline – summary

The baseline assumptions produce a position that looks affordable but starts to weaken over the long term. The HRA can use borrowing to increase the number of council homes over the medium term, but to protect the long term financial health of the HRA the authority needs to be cautious about future commitments. It will be important to continue to minimise costs, while maximising income and resources. Where possible, spending pressures should be contained within the levels of income growth the authority can achieve from rents and other charges.

3. Rent convergence scenarios

3.1. Scenarios and assumptions

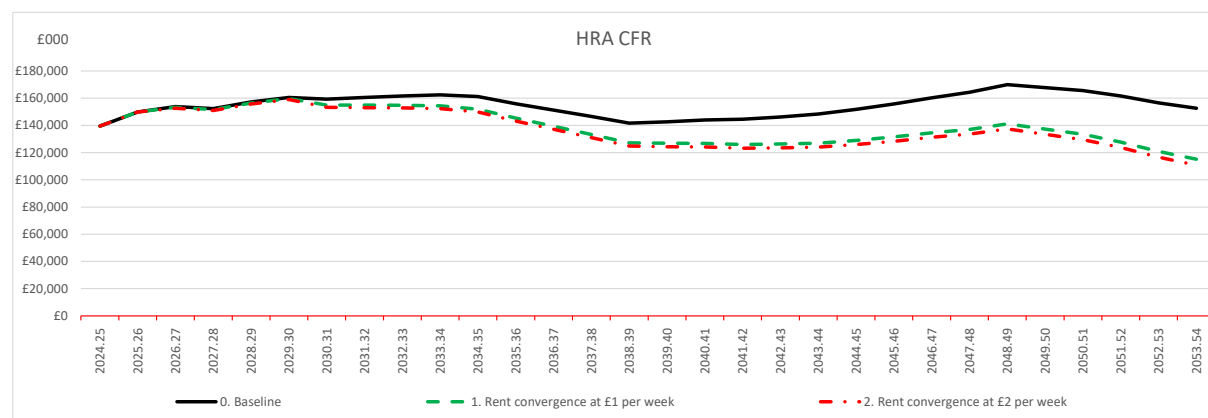
Rent convergence would enable the authority to close any gap between the rent a tenant pays and the formula rent for their property. This would be done by permitting rent increases that are higher than the maximum increase currently set under the rent standard until the actual rent and formula rent for the dwelling reach parity.

The government's consultation on rent convergence considers an uplift of £1 or £2 per week to achieve this alignment. Accordingly, we have prepared one scenario for each of these alternatives:

- Rent convergence at £1 per week
 - The maximum weekly rent increase £1 per week higher for social rent dwellings where actual rents have yet to converge with the formula rent.
 - For dwellings where the rents have already converged, the maximum rent increase is the same as assumed for the baseline
- Rent convergence at £2 per week
 - The maximum weekly rent increase £2 per week higher for social rent dwellings where actual rents have yet to converge with the formula rent.
 - For dwellings where the rents have already converged, the maximum rent increase is the same as assumed for the baseline

3.2. Rent convergence scenarios – debt

The chart below projects movements in the level of HRA debt under each scenario, compared with the baseline position:

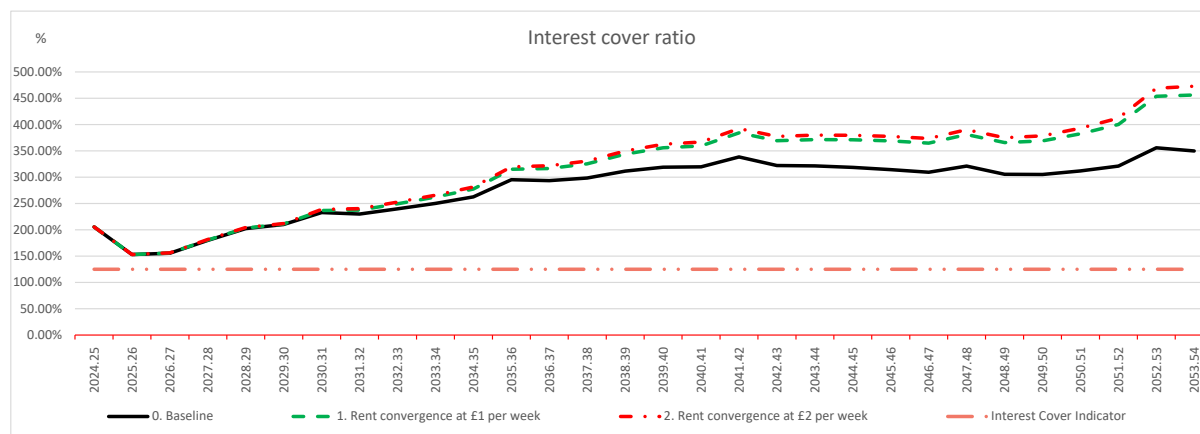


In this chart the black line shows projected HRA-related debt for the baseline. The green dashed line shows the effects of allowing for rent convergence at £1 per week. The red dashed line reflects rent convergence at £2 per week.

Both of the scenarios permit the authority to charge additional rent from 2026/27. This generates additional surpluses for the HRA, which enables it to repay more debt. As a result, debt drops noticeably after the medium term and continues to lower significantly by the end of the projections.

3.3. Rent convergence scenarios – affordability

We can expect rising rents and falling debt levels to have an impact on interest cover, which is a key measure of affordability for HRA-related debt. The impact is shown in the following chart:



The black line in this chart presents the baseline position, with the green line showing the effects of rent convergence at £1 per week and the red line showing rent convergence at £2 per week.

HRA-related debt becomes more affordable as debt levels fall and rents rise. This happens because there is more income available to the HRA, while interest charges on reduced debt levels are also lower. As a result, more income generated from rents is available to be used for other purposes.

3.4. Rent convergence scenarios – summary

Rent convergence clearly has a beneficial impact on the financial health of the HRA, as it permits the authority to increase income from rents while reducing debt.

As an indication, we anticipate that it would take six years for a general needs rent to converge at a rate of £1 per week for New Forest District Council. If rent convergence is permitted at £2 per week, these times reduce to three years for rents to reach parity. This means that rents converge quickly under both options, with similar financial benefits, although the gains are slightly higher for the authority if convergence is permitted at £2 per week.

Alongside any use of rent convergence, we expect the authority would also need to consider the affordability of the resulting rents to its tenants.

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Cabinet – 18 February 2026

Medium Term Financial Plan and Annual Budget 2026/27

Purpose	For Decision
Classification	Public
Executive Summary	This report sets out for Cabinet’s consideration and recommendation to Council the proposed 2026/27 budget and Council Tax. The report sets out what is considered the most likely medium-term financial scenario, based on latest updates from the government and from within the council. Despite the significant adverse impact that the Government’s Fair Funding Review 2.0 has had on the Council’s medium-term forecast, the budget as proposed continues to include significant investment across both revenue and capital towards agreed Corporate Plan Priorities. The proposed balanced budget includes a recommendation to increase Band D equivalent Council Tax by £6.15 (2.99%) in 2026/27 in line with government’s annual threshold. The report gives due consideration to the changing local government landscape as a result of the government’s English Devolution White Paper and emphasises the need for the council to still have due regard to the long-term impact of decisions taken in the course of setting a sound balanced budget.
Recommendation(s)	Cabinet is asked to recommend to Council that: 1) the updated Medium Term Financial Plan (MTFP) and financial strategy, as set out in the report and throughout appendices 1-3, are approved 2) there is a General Fund Net Budget Requirement in 2026/27 of £26.630 million, as set out in appendices 5a - 5d to this report; 3) the New Forest District Council Band D Council Tax for 2026/27 shall be

	£211.92 (paragraph 37); 4) the General Fund Capital Programme for 2026/27 of £14.646 million, as set out in appendix 6 to this report be approved; and 5) the proposed fees and charges as included at appendix 7 to this report be approved.
Reasons for recommendation(s)	The council is legally required to set an annual balanced budget and determine its Council Tax level for the forthcoming financial year. This report enables members to consider the development of the Medium Term Financial Plan, set the General Fund revenue and capital budgets for 2026/27, set the level of Band D Council Tax for 2026/27, and make determinations on the future level of fees and charges.
Ward(s)	All
Portfolio Holder(s)	Councillor Jeremy Heron – Finance and Corporate
Strategic Director(s)	Alan Bethune – Strategic Director Corporate Resources (Section 151 Officer)
Officer Contact	Paul Whittles Assistant Director – Finance (Deputy Section 151 Officer) 02380 285766 paul.whittles@nfdc.gov.uk

Introduction and background

1. On 1 October 2025 and 3 December 2025, the Cabinet considered updates to the Medium Term Financial Plan (MTFP) that informed development of the annual budget for 2026/27. Regular Financial Monitoring reporting throughout 2025/26 has also highlighted areas for consideration in setting the budget for 2026/27.
2. The financial assumptions underpinning this report reflect the final Local Government Finance Settlement for 2026/27, superseding the initial modelling included in the October and December MTFP reports, which were based on information available before the provisional settlement was released.

3. The medium-term forecast to 2029/30 identifies a projected budget deficit of £3.430 million. The Council's Senior Leadership Team remain absolutely committed to ensuring the council continues to be well positioned to invest in services, key priorities and deliver a balanced budget across the medium-term period.
4. In accordance with the council's financial strategy this report sets out the final proposals for the:
 - a. General Fund Net Budget Requirement for 2026/27
 - b. Level of Council Tax for 2026/27
 - c. Medium Term Financial Plan to 2029/30
 - d. General Fund Capital Programme for 2026/27
5. The 2026/27 Local Government Finance Settlement is the first multi-year settlement since 2016, covering the 3-year period from 2026/27 to 2028/29.
6. The most significant factor influencing the settlement is the outcome of the Fair Funding Review (FFR). This represents a comprehensive reform of how Government distributes funding to councils from 2026/27 onwards. It replaces the long standing system of assessing "relative needs and resources" with an evidence based approach that updates need formulas, area cost adjustments and the assessment of how much each council can raise locally through council tax. The purpose of the FFR is to achieve a fairer national distribution of resources, directing a greater share of Government support to areas with higher deprivation and greater service demand, with changes phased in over three years and supported by transitional protection. Unfortunately for New Forest District Council the arrangements broadly favour urban and metropolitan areas compared to rural and shire districts. The Council made clear representations through the consultation process, following the release of the provisional settlement.
7. Implementing the FFR also requires a full Business Rates Reset from 1 April 2026. This will remove all historic business rates accumulative growth since the previous reset and redistribute it using the new Funding formulas. Each authority will be given a new Business Rates Baseline and Baseline Funding Level. As an authority that had consistently achieved Business Rate growth since the inception of the scheme in 2013 and so had over £4 million of retained rates supporting the funding of the General Fund budget, the effective loss of the accumulated Business Rate growth over the

3-year settlement period results in a particularly difficult financial challenge for the council. In summary, the government determined funding allocation for the Council is set to reduce by £1.2 million from 2025/26 to 2028/29;

8. Table 1 – Fair Funding Allocation £ millions:

	2025/26	2026/27	2027/28	2028/29
Legacy Funding Assessment	10.3	-	-	-
Fair Funding Allocation	-	10.0	9.6	9.1

9. Whilst funding simplification through the consolidation of grants has benefits, it has also created additional financial pressure for the Council compared to previously assumed ongoing funding. Several previously discrete grant lines totalling £989,000 have now been absorbed into the overall Revenue Support Grant. Additionally, the settlement has confirmed the new burdens funding to support Food Waste collections (which the Council had estimated would be in the region of £1.5 million annually) has effectively also been amalgamated into the RSG. Adding £989,000 and £1.5 million to the 2025/26 Legacy Funding Assessment would have seen the Council's comparative funding level at c£12.8 million, instead the reset total at the end of the 3-year FFR period is just £9.1 million.
10. The council, in anticipation of the changes to local government funding arising from the Fair Funding reform, prudently put in place a Budget Equalisation Reserve to provide a degree of support to the MTFP should savings, efficiencies or additional income generating options be insufficient. There is no planned use of this reserve in 2026/27, although the significant emerging funding pressures beyond 2026/27 may necessitate its deployment and will likely relatively quickly will diminish the £1.2 million balance held.
11. The 2026/27 budget has been developed against the backdrop of Local Government Reorganisation (LGR) following the Government's invitation for councils, including New Forest District Council (NFDC), to develop and submit proposals for unitary local government. While councils must continue to meet statutory duties, such as delivering essential services, achieving Best Value, and setting a balanced budget, the government has emphasised that reorganisation is a once-in-a-generation opportunity to create simpler, more sustainable local government structures. Decisions taken now by existing councils should therefore avoid undermining the future financial sustainability and service effectiveness of any new unitary authority.

12. The Council needs to remain mindful that certain decisions could materially constrain the options available to a successor authority. These include, but is not limited to, significant asset transactions, major contracts (including IT), organisational restructures, senior appointments, changes to staff terms and conditions, borrowing, use of reserves, and substantial changes to council tax support or exemption schemes. Councils are encouraged to maintain close communication locally and, where appropriate, align services with neighbouring authorities to support a smooth transition.
13. The government has indicated that, once Structural Change Orders are made, formal directions under section 24 of the Local Government and Public Involvement in Health Act 2007 are likely to follow. These will require successor-council consent for high-value asset disposals and contracts. Prior to this formal step, there may be an agreed Memorandum of Understanding that establishes which decisions by predecessor councils will be subject to agreement by partner councils. In the meantime, New Forest District Council's members and statutory officers will maintain strong governance, financial discipline, and timely accounts preparation, collaborating closely with auditors to ensure full assurance over assets, liabilities, and risks. Overall, the council will continue to act in the best interests of the whole area, protecting service continuity while avoiding decisions that could prejudice the success of any future unitary council.
14. The Bank of England Base Rate has been steadily reducing throughout 2025, from 4.50% in February to 3.75% in December. Inflation peaked at 3.8% during the year and remains above the Government's 2% target, standing at 3.4% in December 2025. The important context of relatively high costs of borrowing and above target inflation indices cannot be forgotten when balancing the needs of the council to cover its own expenditure pressures to deliver services to residents, and the proposed levels of Council Tax.
15. Notwithstanding the government's white paper regarding devolution and LGR, the council's MTFP and Annual Budget for 2026/27 has been prepared based on business as usual for the authority, ensuring resources continue to be aligned with service delivery, and the Council's Corporate Plan priorities. Subject to the pace of change, members need to be cognisant of the potential for future in-year budgetary changes in response to any emerging requirements due to local government reform.
16. For the avoidance of doubt, it is also right and proper that the council continues to forecast its medium-term financial position on a

going-concern basis over a 4-year period, and councillors must have due regard to the medium-long term implications of any financial decisions taken in setting the 2026/27 budget and adopting the latest MTFP.

Financial Strategy

2026/27 Financial Strategy – Key Principles

17. The council's proposed budget has been set out in line with the financial strategy for 2026/27:
 - a. The provision of additional financial resources to facilitate the delivery of key strategic objectives
 - b. The establishment of a project management office governance framework to ensure delivery of projects on time and on budget, whilst where appropriate, supporting services take opportunities as they arise through service reviews to protect the delivery of frontline services provided to the Community
 - c. The generation of additional of income, including reviews of fees and charges
 - d. Supporting investment in capital infrastructure and services through the prudent use of its reserves and affordable external borrowing
 - e. Ensuring sufficient and appropriate levels of reserves are available during the period of the MTFP to safeguard frontline services; and
 - f. An understanding of balancing the needs of service users and council taxpayers

Medium Term Financial Strategy 2026/27 to 2029/30

18. In order to appropriately and pro-actively address the forecast deficit to 2029/30 and safeguard the Council's overall financial standing, the council's financial strategy over the medium-term period extends to:
 - a. A broad council-wide focus on delivery and transformation to identify and deliver a programmed approach to assets, services, and ways of working.
 - b. A full and thorough review of all options that consider overall resourcing, income generation and cost of service delivery in the context of the corporate plan and MTFP.

- c. Continuation of partnering and collaboration with others to transform service delivery in the context of the devolution and LGR agenda and timetable.
- d. Supporting the orderly transition of services and assets to the new unitary authority as part of LGR.
- e. The release of accrued short-term reserve balances to assist in the damping of the Fair Funding Review (and impact this has specifically to retained business rates) as necessary.
- f. The utilisation of reserve balances (and when necessary external borrowing) to deliver community infrastructure projects, invest in assets and assist in supporting a vibrant and robust New Forest Economy, whilst targeting valuable additional income.
- g. The adequate protection of reserve balances for unknown and/or as yet unquantifiable events / needs.
- h. Ensuring strategies developed through the corporate framework appropriately feed into the council's financial strategy; and
- i. Investing in an environmentally sustainable approach to financial planning and spending.

General Fund Budget 2026/27

19. The council's annual budget process has been particularly challenging due to the uncertainty leading up to the first multi-year settlement and the significant financial impact of the Fair Funding Review on individual local authority resources. Despite these pressures and although the financial outcomes are disappointing for the council, the 2026/27 position has been managed effectively. Through the continued identification and delivery of savings, alongside additional income being brought into the council, the council is able to set a balanced budget for 2026/27 which includes:
- a. the ongoing investment in the new waste service;
 - b. targeted investment to deliver key priorities; and
 - c. resources to support Local Government Reorganisation;

Service Investments

20. The updated resource summary and budget requirements for 2026/27 (both totalling £26.630 million) are presented in appendices 1 and 2.
21. Within the proposed budget, specific new budgetary provision has been made for targeted investment in the following areas;
 - a. Waste Strategy; An additional £1.500 million has been included to embed the “behind the gate” food waste caddy collection model trialled in 2025/26, reducing to £1.440 million in 2027/28.
 - b. Coastal Maintenance; An increase of £77,000, taking the budget to £400,000 reflecting the continued importance of maintaining and protecting the district’s coastline.
 - c. Public Conveniences; £61,000 is included to recruit additional cleaners to support service standards across the district.
 - d. Asset Maintenance and Repairs (AMR); An additional £100,000 has been added to increase the General Fund AMR budget to £2.600 million, supporting ongoing upgrades to the Council’s fleet, offices, and depots.
 - e. Transformation Programme; £306,000 investment (in line with the revised business case) to support the dedicated team and implement modern working practices and digital service improvements.
 - f. Training and Workforce Development; The corporate training budget has been increased by £14,000 to £50,000, alongside a new training co-ordinator post (£40,000) within Place Operations.
 - g. Information Governance and Complaints; £45,000 has been added to strengthen complaints administration capacity.
 - h. ICT work programme; £224,000 reprofiling of activity to support delivery in 2026/27.
 - i. Grant consolidation adjustment: Due to the funding simplification and consolidation of grants referenced in paragraph 9, the Council has needed to adjust its budget to include the previously discrete grant lines totalling £989,000.
22. In line with the summary headings used in appendix 2, the following additional material budget changes (greater than £50,000, or

otherwise noteworthy) have been incorporated into the 2026/27 budget, beyond those set out in paragraph 21.

- a. Pay & Price Increases: +£1.338 million in 2026/27; +£1.250 million in 2027/28, 2028/29 and 2029/30
 - i. Pay Award; additional budgeted pay award costs (including 2025/26 pay award beyond the original assumption anticipated) and incremental progression have totalled £1.063 million. Within this £900,000 relates to an assumed 3.2% pay award, a £51,000 increase to pay award contingency (£300,000 in total) and £83,000 regarding removal of our lowest pay band. The +£900,000 assumption for pay award is repeated in 2027/28, 2028/29 and 2029/30.
 - ii. Increments: £250,000 has been included for incremental pay increases within bands in each year up to an including 2029/30.
 - iii. Inflation and cost increases; £54,000 is included within the 2026/27 budget to allow for inflation, including insurance and contractual uplifts. £100,000 is included for all future years.
- b. Budget Adjustments relating to one-off items: -£40,000 in 2026/27
 - i. One-off funding for two reviews, Commercial Waste and Glass collection rounds was added in 2025/26, this has been removed for 2026/27.
- c. Waste Service Change: +£666,000 in 2026/27; -£114,000 in 2027/28; £100,000 in 2028/29; £100,000 in 2029/30
 - i. In addition to the £1.500 million investment outlined in paragraph 21 (a) there are a number of additional budget adjustments as follows:
 - ii. Transition costs; the 2026/27 budget shows a reduction in one-off additional support costs for the new waste service of £688,000 with the remaining £154,000 being removed in 2027/28.
 - iii. New Service Rollout; following the roll out of all three phases the new service requires £534,000 to deliver the original plan. Subsequently, as informed by a review of

phases 1 and 2, the new waste service is expecting to require a further £140,000.

- iv. EPR (Extended Producers Responsibility for Packaging) Funding: The income budget for 2026/27 has been increased by £1.282 million based on the latest advice from Department for Environment, Food & Rural Affairs (Defra). This has been reduced by £100,000 each year thereafter.
 - v. A £346,000 adjustment removes the one-off contribution from the Corporate Priority Reserve in 2025/26.
 - vi. Drivers within Waste and Street Scene services have been given a market supplement due to persistent and ongoing challenges recruiting and retaining drivers resulting in a budget requirement totalling £116,000. In accordance with Policy, the use of the Market Supplement is reviewed at least annually.
- d. Ongoing Savings and Income Generation: -£1,909,000 improvement in 2026/27; -£9,000 in 2027/28; -£2,000 in 2028/29; -£150,000 in 2029/30
- i. Efficiency Programme and Fees and Charges Yield
 - 1. Garden Waste Charges have been reviewed, with new charges forecasting an additional yield of £86,000 to the council.
 - 2. New parking service charges that came into effect 1 January 2026 are forecast to generate an additional net yield (after some direct service costs being taken into account) of £132,000 to the council for 2026/27.
 - 3. Other fees and charges reviews have taken place, including the annual rent increase at Stillwater Park, new charges for street naming and numbering and charges across the foreshore adding £68,000 to 2026/27 budgets.
 - ii. Contractual income
 - 1. Contractual increases in income relating to our leisure facilities are forecast to yield an additional

£153,000 in 2026/27 and a further £491,000 growth over the subsequent 3 years.

2. Furthermore, the leisure contract contingency regarding energy pain share has been removed (£375,000), with a £100,000 general leisure contingency provision retained in its place.
3. Contractual increases to glass recycling prices are expected to yield an additional £25,000 in 2026/27.

iii. Income Adjustments

1. Adjustments have been made to increase income expectations in Planning income by £170,000 during 2027/28 (£70,000) and 2028/29 (£100,000).

iv. Strategy Delivery

1. Treasury Management during 2026/27 forecasts the continuation of positive interest earnings with an additional £500,000 included in the MTFP, but treasury income budgets then evenly reduce between 2027/28 and 2028/29 by £250,000 each year, due to an expectation of falling interest rates and investment balances.

v. Pension Revaluation

1. The 2025 triennial pension fund valuation was positive, confirming the fund was performing well and in an overall surplus, to the extent that asset values were higher than scheme liabilities by over 20%. The council having previously been required to increase employers' contributions over the past decade from 13.1% to 18.4%, are now able to reduce employers pension contributions down to 15.5% for the next three financial years. This has resulted in a £670,000 budget reduction in 2026/27.

- e. Alignment of budget to Priorities and New Budget Requirements: +£1.067 million in 2026/27; £219,000 in 2027/28; £230,000 in 2028/29

i. New Budget Requirements

1. Following the review of Public Space Protection Orders (PSPOs) in 2025/26 this budget is not required in 2026/27 resulting in a £50,000 reduction.
2. £127,000 adjustment to right size income budgeted within car parking (£95,000) and Keyhaven (£32,000).
3. In order to support the overall Medium Term Financial Plan, it has been necessary to remove the discretionary Revenue Contributions to Capital Outlay (RCCO) totalling £1.100 million.
4. £118,000 to increase the senior manager team capacity with the inclusion of the new Deputy Chief Executive and Chief Operations Officer role.
5. Increases to ICT software licence costs requires and additional £90,000 in 2026/27.
6. Additional staffing requirements across the Council's depots has required a £79,000 investment.
7. Additional numerous minor adjustments across services result in a net favourable adjustment of £53,000.

Local Government Reorganisation (LGR)

23. This budget and the Medium Term Financial Plan acknowledge the council's requirement to ensure an orderly, well governed, and fully resourced transition into any future unitary arrangements.
24. Consequently, the 2026/27 budget includes £677,000 to fund the necessary capacity and programme support including:
 - a. Additional senior officer capacity, including a proportion of the newly created Deputy Chief Executive and Chief Operations Officer role;
 - b. Increasing specific service capacity, such as ICT, HR, and Planning; and
 - c. Project management and programme support resources

25. These costs will be funded through a combination of revenue budgets (£150,000) and drawdowns from the £2 million Devolution and Local Government Reorganisation Reserve.
26. These resources are intended to cover our own preparedness costs, as well as the anticipated additional contributions towards the wider transition programme across the participating councils. Based on the business cases submitted, the total cost of implementation and transition is estimated at between £80 million and £132 million, subject to final Government decisions. Whilst cost sharing arrangements have yet to be agreed, it is highly likely that the Council will be required to contribute its fair and proportionate share over the next two financial years.

Planned use of and contributions to Reserves

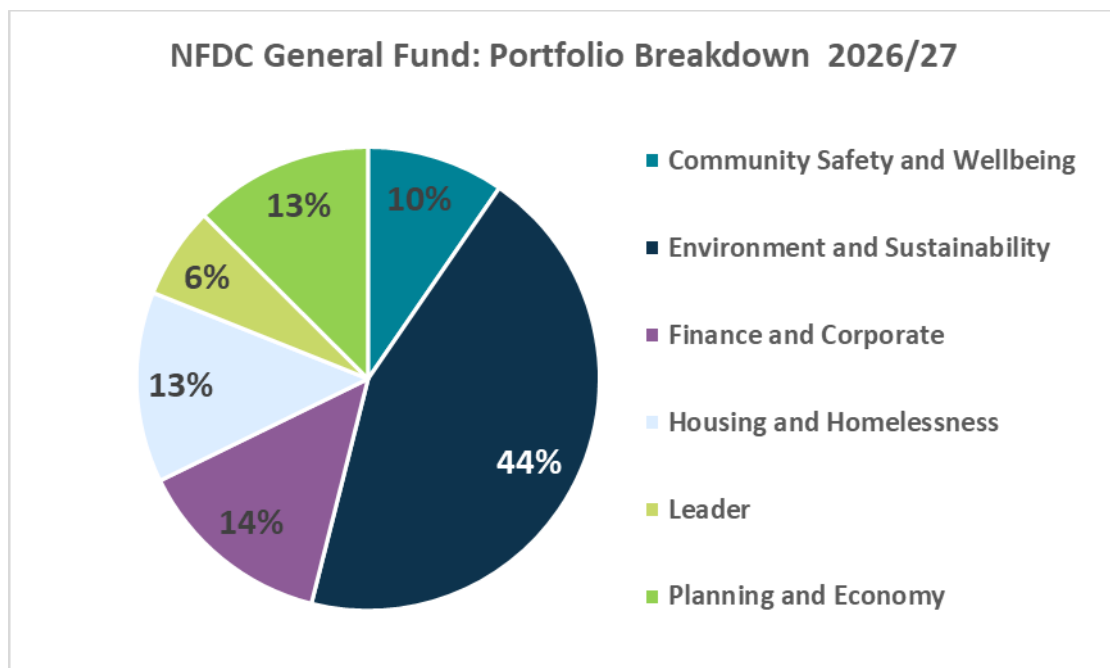
27. Appendix 5d sets out all movements in reserves that form part of the 2026/27 General Fund revenue budget. In summary, the original 2025/26 budget allowed for net transfers from reserves totalling £1.645 million. In 2026/27, planned net transfers from reserves total £877,000. A full breakdown of all transfers from and to is provided in appendix 5d.
28. Net transfers include £281,000 from the earmarked local plan reserve to support the delivery of this corporate priority.
29. The Corporate Priorities Reserve totalled £1.846 million at 1 April 2025, £676,000 has been drawn down during 2025/26 (£346,000 re waste rollout, £306,000 re transformation, £24,000 re SAMP) leaving £1.170 million available from 2026/27. The latest Financial Monitoring Report seeks council resolution to increase this reserve by £1.296 million. The intention through this MTFP is to support the improvements in public conveniences as part of the Council's Strategic Asset Management Plan (SAMP) from this enhanced reserve.

Summary of Proposals and Council Tax for 2026/27

30. The General Fund net budget requirement for 2026/27 will be £26.630 million (appendices 5a & 5b). This represents an increase of £1.121 million compared to the 2025/26 budget requirement and reflects the combined impact of service investments, inflationary pressures, pay and pension changes, and the revised funding environment arising from the Fair Funding Review.
31. The General Fund budget is allocated across six portfolios (as shown in appendix 5a). Due to their nature, the costs of some corporate resources are apportioned across several, if not all, portfolios and so

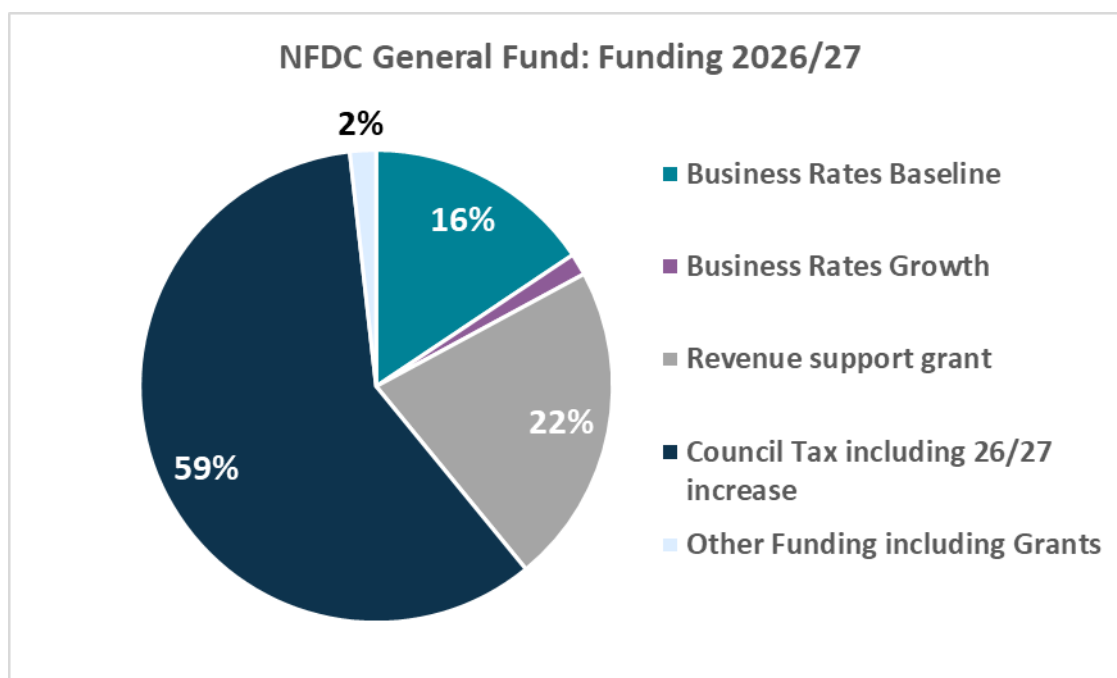
to support transparency, warrant separate inclusion as part of this budget setting report (appendix 5c). The breakdown of the 2026/27 budget at ultimate Portfolio level is as follows:

32. Graph A – NFDC General Fund: Portfolio Breakdown 2026/27



33. The budget is funded predominantly through Council Tax and Business Rates, with further support coming via central government grants:

34. Graph B – NFDC General Fund: Funding Breakdown 2026/27



35. Estimates and assumptions have been made at this time surrounding the potential for residual degree of Business Rate Retention for 2026/27. This is supported by analysis conducted by the financial advisory service that the Council subscribes to. Officers will continue to monitor the position and will report any developments and likely variations in accordance with established financial monitoring practise.
36. At its meeting on 4 February 2026, Cabinet approved the recommendations set out in the 'Community Grant Funding 2026/27' report. This confirmed the award of £273,859 in revenue and capital community grants for the 2026/27 financial year. In addition, the council has £48,000 budgeted for the councillor's community engagement grant scheme. This results in the total value of community grant awards being £321,859 for the year.

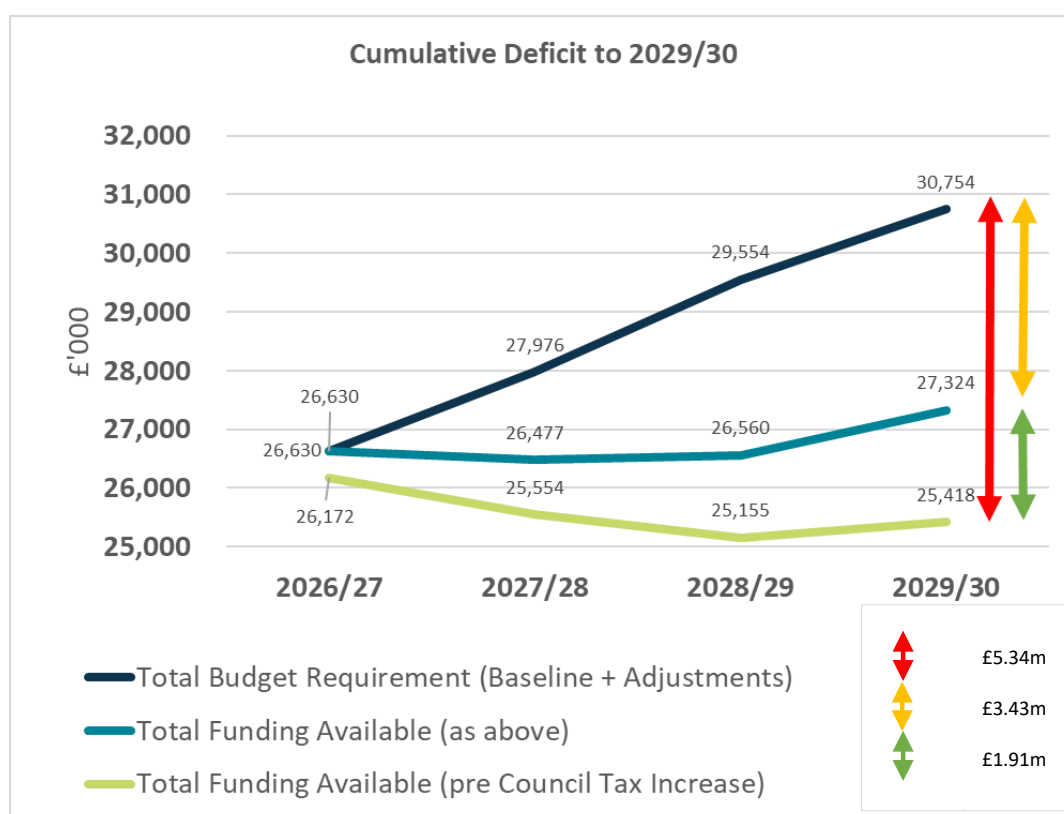
Council Tax for 2026/27

37. The proposed balanced budget for 2026/27 includes a proposed New Forest District Council Band D Council Tax increase of £6.15 (2.99%). This results in a New Forest District Precept of £211.92 for the year (equivalent to £3.95 per week for all services provided by New Forest District Council).
38. Of the £26.630 million General Fund Net Budget Requirement for 2026/27, the total cost to be met by council taxpayers will be £15.747 million with the remainder funded from business rates, government allocations, fees and charges, and other income sources.

The Medium Term Position

39. Whilst a multi-year settlement has been provided from 2026/27 until 2028/29, the full impact from the Fair Funding Review and the reset of business rate retention scheme (including any transitional arrangements) will have on individual local authorities remains unclear until fully embedded.
40. The medium-term summaries set out over appendices 1, 2 and 3 provide a prudent outlook for the future years' budgets and are based on the latest information available.
41. The council will continue to work within the financial strategy set out in paragraphs 17 and 18 of this report to ensure the longer-term financial stability of the council. The current MTFP deficit to 2029/30 (appendix 2) of £3.430 million will be addressed dependant on;

- a. taking appropriate opportunities regarding commercial and residential property strategies to bring valuable new sources of additional income into the council;
 - b. crystalising savings and efficiencies across council services;
 - c. ongoing growth in all council fees and charges income in line with policy;
 - d. council's ability to maximise its revenues through local taxation (graph C demonstrates below the severity of the budget deficit, if annual Council Tax increases are not assumed); and
 - e. appropriate use of the budget equalisation reserve.
42. The MTFP currently forecasts a balanced position in 2026/27, but this is subject to change in line with the uncertainties as outlined further in the report. The short-medium term outlook will become clearer as we progress into 2026/27, and so future MTFP updates can take account of the latest forecast and make recommendations about future budget provision beyond 2026/27 towards agreed priorities accordingly.
43. Graph C – NFDC General Fund Cumulative Deficit to 2029/30



Pay and reward

44. A base pay award assumption of 3.2% is allowed for within the detailed budget for 2026/27 and throughout the MTFP. Based on relatively high levels of inflation in recent years there is always potential for settled pay awards to be larger over the short-medium term. As a result of this, and a backdrop of larger pay awards covering 2022/23, 2023/24, 2024/25 and 2025/26, an allowance of £300,000 has been retained in a pay award contingency for 2026/27. The NJC unions have now presented their claim for 2026/27 which would be in excess of the 3.2% and the pay award contingency. On the basis the final negotiated payment is usually lower than the initial claim, there is no need for the council to reflect additional pay award costs at this time. The Employee Side Liaison Panel will keep abreast of developments on the 2026/27 pay bargaining negotiations as they progress during 2026.

General Fund Capital Programme and Financing

45. The council's proposed General Fund Capital Programme for 2026/27 totals £14.646 million. This significant programme will use the majority of remaining general capital reserve balances with current needs exhausting them over the medium-term.
46. The Asset Maintenance and Replacement Budget and General Fund Capital Programme report presented to the Cabinet on 4 February 2026 gave the full detail at individual scheme level. This report includes the summarised programme and financing at appendix 6.
47. The Commercial and Residential Property Acquisition and Development Funds are not shown in the programme at appendix 6 because of the uncertainty around when funds will be required. The council has established governance arrangements in place for the approval of funds, with each potential Commercial purchase demonstrating a strong link to supporting employment and the Economy within the District. The in-year financial reporting and updates to the Resources and Transformation Overview and Scrutiny Panel provide members with valuable updates on activity in this area.
48. A range of Prudential Indicators need to be approved prior to the start of each financial year. The council's Capital Strategy presented to the Cabinet on 4 February 2026 included the key capital indicators. The Treasury Management and Investment Strategies for 2026/27 to 2028/29, including key indicators, were considered by the Audit Committee on 23 January 2026 and have been recommended to the council for approval.

49. As of the 31 March 2025, the council was holding Developer Contribution (DC) balances of £2,356,480 and Community Infrastructure Levy (CIL) balances of £8,077,299. So far during the year, a further £710,129 of DC and £2,854,807 of CIL has been collected in cash receipts from developers. The latest 2025/26 budget provides for expenditure of £3,300,000.
50. The proposed Capital programme budget for 2026/27 - 2028/29 includes DC and CIL funded projects of £22,050,000. Further work will be undertaken during 2026/27 to ensure the council continues to facilitate the delivery of projects using the funding it collects for this purpose. This may include utilising up to 5% of collected CIL to fund administration and project management of schemes.

Section 25 Statement: Robustness of Estimates and Adequacy of Reserves

51. There are a range of safeguards in place to help prevent local authorities overcommitting themselves financially. These include the Chief Finance Officer's duty to report on the robustness of estimates and adequacy of reserves (under section 25 of the Local Government Act 2003) when the authority is considering its budget requirement 41 (England and Wales).

Section 25 Statement from the Section 151 Officer

52. The 2026/27 budget has been constructed based on all latest information and considers all factors that will have an implication to 2026/27 that are in the council's control. Budget variations in relation to 2025/26 trends and levels of inflation have been considered and included within the budget where appropriate. Income projections are sensible and not overinflated, and the full cost of the council's staffing establishment is based on latest pay assumptions and is calculated in an appropriate level of detail. Senior Management across the council engage with the council's central finance team on the preparation of the detailed budgets, and only budgets that have the backing of senior management make it through to this budget setting report for consideration by members of the Cabinet and ultimately Council.
53. There are areas of uncertainty that the council needs to be particularly mindful of, affecting the budget assumptions over the medium-term. These include (but are not entirely limited to) the:
- a. business rate changes
 - b. steady state costs of the new waste service when operating effectively as planned

- c. level of ongoing EPR funding beyond 2025/26
 - d. impact on resources required to support LGR preparations
 - e. pay award increases
 - f. impact regarding proposed changes to increase the statutory fee structure regarding Planning applications
 - g. potential for unknown and/or as yet unquantifiable events that could have a bearing on the Council's overall financial position
54. In setting the General Fund Revenue Budget for 2026/27, the overall reserve transfers are clearly laid out in appendix 5d and are for specific purposes. It is worthy of note that despite the significant funding reform impact through the Fair Funding Review 2.0, the Council is able to produce a balanced budget for 2026/27 that does not necessitate a draw down from the Budget Equalisation Reserve, reserving this limited funding source for future years when the impact of the FFR is more significant. Appendix 7 details the value of reserves to be used in financing the General Fund Capital Programme in 2026/27. The council's Capital Strategy (Cabinet: 4 February 2026) takes this further to combine the General Fund and Housing Revenue Account Capital Programmes and details how reserves will be used in financing the delivery of these forecast programmes over the medium-term period. Use of reserves is supplemented where appropriate with borrowing, and an assessment is made on the affordability and proportionality of financing charges to the revenue budget.
55. The General Fund Balance reserve at £3 million and the Housing Revenue Account (HRA) reserve at £1 million are considered to be adequate for 2026/27 considering the overall size of the council's budget across these two accounts. Variations in actual performance as compared to budget assumptions are inevitable in an organisation with a turnover as large as the council's, especially when also considering the diverse range and complexities of services and differing levels of demand on those services throughout a fiscal period. Reserves exist, in particular the General Fund Balance and HRA reserves, to provide a cushion for these variations, and to provide a funding backstop for unknown and/or as yet unquantifiable events.
56. The council maintains a suitable level of liquidity regarding its cash balances in order to service the day-to-day requirements of the council. In order to maintain its professional investor status a

minimum of £10 million must be available. Full details on how the council manages its borrowing, investments and risks can be found in the council's Treasury Management Strategy 2026/27 report.

57. As the council's Chief Finance Officer, I am satisfied on the robustness of the estimates as included in the budget for 2026/27 and MTFP to 2029/30 and I am able to provide assurance on the adequacy of reserves held by the council.

Fees and Charges

58. A fees and charges policy position was set and adopted by the council in October 2023. It included an assumption on growth equivalent to 20% over the 3-year period to 2026/27. Further fees and charges growth is budgeted to continue thereafter, with a £300,000 increase each year, targeted from 2027/28.
59. Portfolio Holders have reviewed and proposed their fees and charges levels across several services for 2026/27, and these are documented throughout appendix 7 and where required any changes form part of the recommendations to council.

Corporate plan priorities

60. This budget supports all the council priorities whilst maintaining a balanced MTFP. It ensures we are being financially responsible and supports our Future New Forest transformation programme which underpins the delivery of all our priorities.
61. The council is resourced to enable a review of priorities, and the budget as laid out makes suitable provision for allocated funding to support new and emerging priorities as a result of Devolution and Local Government Reorganisation.

Options appraisal

62. Due to the finite level of resources available to the council and the need to maintain adequate reserves every budget has been considered with due regard to all others.
63. Should significant options not be taken (for example the recommendation to increase Council Tax) this would require contra reduction within service budgets to be identified. It is considered such action would be detrimental to the delivery of a sound balanced budget, aimed at delivering the council's priorities.

Consultation undertaken

- 64. Internal consultation between portfolio holders, finance officers, service managers, and budget holders informed by external consultants and surveys have determined the forecast data presented in the report.
- 65. Throughout December and early January an on-line consultation was available to Business Rate payers. This provided the opportunity for feedback regarding the budget and MTFP including the proposed financial strategy and options to close the gap.

Financial and resource implications

- 66. This is a financial report with budget implications already detailed and considered in the main body of the report.

Legal implications

- 67. The council has a fiduciary duty to its taxpayers to be prudent in the administration of the funds on their behalf and an equal duty to consider the interests of the community which benefit from the services it provides.
- 68. It is the responsibility of councillors to ensure the council sets a balanced budget for the forthcoming year. In setting, such a budget councillors and officers of the council have a legal requirement to ensure it is balanced in a manner which reflects the needs of both current and future taxpayers in discharging these responsibilities. In essence, this is a direct reference to ensure that council sets a financially sustainable budget which is mindful of the long-term consequences of any short-term decisions.
- 69. As a billing authority, failure to set a legal budget by 11 March each year may lead to intervention from the Secretary of State under section 15 of the Local Government Act 1999. It should however be noted that the deadline is, in reality, the 1 March each year to allow sufficient time for the Council Tax direct debit process to be adhered to.

Risk assessment

- 70. The budget for 2026/27 is based upon best estimates, but uncertainty still remains over the short-term and medium-term on a variety of matters. The period of the MTFP will see the most significant change this council has undertaken, along with a changing national policy landscape. It is vitally important that the council continues with its prudent financial planning and continues

to take actions to deliver a balanced budget over the medium-term period.

71. The council provides regular financial monitoring reports, providing valuable updates on the latest forecasts as against original expectations and has £3 million in the General Fund Reserve, available to support service delivery budgets. The council also has a Budget Equalisation Reserve, which exists to smooth out annual fluctuations in council funding. Within this context, the budget as now presented to Cabinet is considered to be robust and deliverable.

Environmental / Climate and nature implications

72. The dedicated Sustainability team and the ongoing £125,000 annual working budget across revenue and capital allowed for within the council's Medium Term Financial Plan will enable the council to deliver critical priorities on its agreed Climate and Nature Emergency action plan and invest in carbon reduction projects and green initiatives. As the council moves forwards with its climate action plan and longer-term strategy, the Medium Term Financial Plan will be reviewed and further reports brought forward as required.
73. Hybrid working continues to help reduce travelling time for officers across several departments of the council.
74. All of the council's procured energy comes from 100% renewable energy sources.

Equalities implications

75. Over the medium-term, as the council continually strives to provide quality services at maximum value for money, any potential equality and diversity implications will be covered as and when key decisions are made.

Crime and disorder implications

76. The council's budget for 2026/27 contains £705,000 supporting community safety and CCTV operations.

Data protection / Information governance / ICT implications

77. There are no additional data protection, information governance or ICT implications arising directly from this report, the report and budget do however provide sufficient funding to ensure obligations and requirements in this area are met.

Appendices:

Appendix 1 – MTFP General Fund Budget 2026/27 - Summary of Resources

Appendix 2 – MTFP General Fund Budget 2026/27 - Summary of Budget Requirements

Appendix 3 – MTFP General Fund Budget 2026/27 – Options identified to close budget shortfall

Appendix 4 – MTFP General Fund Budget 2026/27 – Asset Maintenance and Replacement Programme

Appendix 5a – MTFP General Fund Budget 2026/27 – Portfolio Summary

Appendix 5b – MTFP General Fund Budget 2026/27 – Portfolio Summary

Appendix 5c – MTFP General Fund Budget 2026/27 – Central Support Service Business Units

Appendix 5d – MTFP General Fund Budget 2026/27 – Movement in Reserves

Appendix 6 – MTFP General Fund Budget 2026/27 – Capital Projects

Appendix 7 – MTFP General Fund Budget 2026/27 – Proposed Fees and Charges

Background Papers:

Audit Committee 13 February 2026:

Treasury Management Strategy 2026/27

Cabinet 5 February 2025:

Financial Monitoring Report (based on performance April to December 2025 inclusive)

Asset Maintenance and Replacement Programme and General Fund Capital Programme 2026/27

Capital Strategy 2026/27

Cabinet 3 December 2025:

[Medium Term Financial Plan – General Fund Update](#)

Cabinet 1 October 2025:

[Medium Term Financial Plan - Scene Setting](#)

Cabinet 19 February 2025:

[Housing Revenue Account Budget and the Housing Public Sector Capital Expenditure Programme 2025/26](#)

[Medium Term Financial Plan and Annual Budget 2025/26](#)

MEDIUM TERM FINANCIAL PLAN 2026 - 2030

SUMMARY OF RESOURCES

FUNDING

	2025/26	2026/27	2027/28	2028/29	2029/30
Original					
Budget	Forecast	Forecast	Forecast	Forecast	Forecast
£'000's	£'000's	£'000's	£'000's	£'000's	£'000's
Business Rates Baseline	4,378	4,157	4,251	4,338	4,425
Business Rates Baseline Indexing Compensation 22/23	327				
Business Rates Baseline Indexing Compensation 23/24	379				
Business Rates Baseline Indexing Compensation 24/25	130				
Business Rates Baseline Indexing Compensation 25/26	39				
Business Rates Baseline Indexing Compensation 26/27					
Business Rates Retained Surplus	4,132	400	400	400	400
Revenue Support Grant		5,851	5,337	4,772	4,869
New Homes Bonus	36	0	0	0	0
Funding Guarantee Grant / Settlement Funding	676	0	0	0	0
Grant re Employers National Insurance	155	0	0	0	0
RSG Revenue Support Grant	1	0	0	0	0
Contribution to (-) / From Budget Equalisation Reserve	0	0	0	0	0
Total Government Determined Resources	10,253	10,408	9,988	9,510	9,694
Council Tax					
Base from Previous Year	14,459	15,094	15,747	16,289	16,850
Tax Base Adjustment (Additional Properties)	72	75	77	79	79
Annual CT £ / % Increase	363	458	465	482	501
Council Tax Premiums	200	120	0	0	0
Total Council Tax	15,094	15,747	16,289	16,850	17,430
Business Rates Collection Fund Deficit(-) / Surplus	0	0	0	0	0
Council Tax Collection Fund Deficit(-) / Surplus	162	475	200	200	200
Total Collection Funds	162	475	200	200	200
TOTAL FUNDING	25,509	26,630	26,477	26,560	27,324
Cumulative Change from Original 2025/26		1,121	968	1,051	1,815
%age change		4%	4%	4%	7%

MEDIUM TERM FINANCIAL PLAN 2026 - 2030

SUMMARY OF BUDGET REQUIREMENT

Baseline Funding 2025/26

Budget Requirement 2026/27 - 2029/30

Pay & Price Increases

Pay Award (assumed 3.2%)

Pay Award Contingency

Pay spine review

Increments

Prices - Insurance, Utilities, Fuel & Maintenance

Pay & Price Increases

Cumulative Pay & Price Increases

Budget adjustments relating to one-off items

Investment in Commercial Waste review

Investment in Glass collection round review

Waste Service Change

Transition Costs

Additional temporary waste transition service costs

New Service Rollout

EPR Funding

Contribution from Corporate Priorities Reserve (Used in 25/26; Removal in 2026/27)

Ongoing waste service costs

Behind the gate collection trial embedded fully

Waste and Street Scene drivers market supplement

Ongoing Savings and Income Generation

Fees & Charges Yield - Garden Waste

Fees & Charges Yield - Car Parking

Fees & Charges Yield - Keyhaven

Fees & Charges Yield - Other Services

Contractual income - Leisure

Removal of Leisure contract contingency / Energy painshare

Leisure contingency

Contractual income - Glass recycling

Income Adjustment - Reduction in Planning Income

Strategy Delivery - Treasury

Pension revaluation

Cumulative effect of Adjustments and Savings

2026/27	2027/28	2028/29	2029/30
Forecast	Forecast	Forecast	Forecast
£'000's	£'000's	£'000's	£'000's
25,509	25,509	25,509	25,509
900	900	900	900
51	0	0	0
83	0	0	0
250	250	250	250
54	100	100	100
1,338	1,250	1,250	1,250
1,338	2,588	3,838	5,088
-20			
-20			
-40	0	0	0
-722	-120		
34	-34		
534			
-1,282	100	100	100
346			
140			
1,500	-60		
116			
666	-114	100	100
-86			
-132			
-8			
-60			
-153	-189	-152	-150
-375			
100			
-25			
	-70	-100	
-500	250	250	
-670			
-1,909	-9	-2	-150
-1,283	-1,406	-1,308	-1,358

MEDIUM TERM FINANCIAL PLAN 2026 - 2030

SUMMARY OF BUDGET REQUIREMENT

Alignment of Budget to Priorities and New Budget Requirements

	2026/27 Forecast £'000's	2027/28 Forecast £'000's	2028/29 Forecast £'000's	2029/30 Forecast £'000's
Investment in Transformation Business Case (on-going)	306	78		
Investment in Digital Project Management Resource		25		
Investment in Complaints Resource	45			
Investment Devolution and LGR Programme and Workstream Resource			-70	
Cleaners for PCs	61			
Public Space Protection Order (PSPO) Review	-50			
Adjustment to rightsize car parking income budget	95			
Adjustment to rightsize Keyhaven income budget	32			
Adjustments to air quality monitoring budget requirements		55		
Lyndhurst car park - lease		100	300	
Previous service specific grants now rolled up in RSG:				
Homelessness grant	677	-39		
Council Tax Collection	110			
Housing Benefits Admin	152			
Transparency Code Grant	8			
Electoral Integrity Grant	15			
Biodiversity Net Gain Grant	27			
Removal of Revenue Contribution to Capital Outlay (RCCO)	-1,100			
Reprofiling of ICT Work Programme	224			
AMR	100			
New Chief Operating Officer role	117			
ICT Software licences	90			
Place Operations Training Coordinator	40			
Increase to corporate wide training budget	14			
Depot Supervisor	45			
Site Caretaker (Floating)	20			
New Depot Cleaner at Hardley	14			
Increase coastal maintenance budget	77			
Market Supplement for Fitters Teams	25			
Ringwood gateway - Planned Maintenance	12			
Increase council general fund contingency	19			
Review and realignment of various service budgets (net)	-109			
	1,066	219	230	0
Cumulative effect of New Requirements	1,066	1,285	1,515	1,515
Total Budget Requirement (Baseline + Adjustments)	26,630	27,976	29,554	30,754
Total Funding Available (as above)	26,630	26,477	26,560	27,324
Estimated Cumulative Surplus / Shortfall (-)	0	-1,499	-2,994	-3,430

Treasury / Commercial / Residential Investment Income 2026/27
Treasury / Commercial / Residential Investment Income 2027/28
Treasury / Commercial / Residential Investment Income 2028/29

General Process Efficiency and Channel Shift

Targeted Fees and Charges Growth

Mitigation: Additional Property Investment Income
Mitigation: Transformation Programme Efficiencies
Impact OR Mitigation: Business Rate Changes
Mitigation: EPR Income from HMT
Mitigation: Tax Raising Flexibilities
Mitigation: Consideration of all options to support the MTFP

Use of Equalisation Reserves (-) / Headroom (to support Capital) +

2026/27	2027/28	2028/29	2029/30
Forecast	Forecast	Forecast	Forecast
£'000's	£'000's	£'000's	£'000's
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	300	600	900
+ / - ?	+ / - ?	+ / - ?	+ / - ?
+ / - ?	+ / - ?	+ / - ?	+ / - ?
+ / - ?	+ / - ?	+ / - ?	+ / - ?
+ / - ?	+ / - ?	+ / - ?	+ / - ?
+ ?	+ ?	+ ?	+ ?
+ / - ?	+ / - ?	+ / - ?	+ / - ?
0	300	600	900
0	-1,199	-2,394	-2,530

General Fund Balance
Budget Equalisation Reserve

3,000	3,000	3,000	3,000
1,199	1,199	1,199	1,199

MEDIUM TERM FINANCIAL PLAN 2026-2029

GENERAL FUND ASSET MAINTENANCE AND REPLACEMENT (AMR) PROGRAMME

	2025/26	2026/27	2027/28	2028/29
	£'000	£'000	£'000	£'000
Health & Leisure Centres	750	750	750	750
Office, Depots and Outlying Buildings	270	265	-	-
Cemeteries	-	48	-	-
Hythe Prom	-	12	-	-
Programme Contingency	30	45	370	370
	1,050	1,120	1,120	1,120
ICT Replacement Programme	190	190	190	190
Vehicle and Plant (Depreciation/MRP)	1,650	1,790	1,790	1,790
	1,840	1,980	1,980	1,980
Less: Proportion allocated to the HRA	-390	-500	-500	-500
TOTAL GENERAL FUND AMR PROGRAMME	2,500	2,600	2,600	2,600

MEDIUM TERM FINANCIAL PLAN 2026-2027

GENERAL FUND BUDGET 2026/27

PORTFOLIO REQUIREMENTS

Community Safety and Wellbeing
 Environment and Sustainability
 Finance and Corporate
 Housing and Homelessness
 Leader
 Planning and Economy

Reversal of Depreciation
 Contribution to/(from) Earmarked Revenue Reserves

NET PORTFOLIO REQUIREMENTS

Minimum Revenue Provision
 Contribution to Capital Programme Financing (RCCO)
 Interest Costs
 Interest Earnings
 Waste Services Grant
 Other grants

GENERAL FUND NET BUDGET REQUIREMENTS

COUNCIL TAX CALCULATION

Budget Requirement

Less:

Settlement Funding Assessment

Revenue Support Grant

New Homes Bonus

Employers National Insurance Grant

Guarantee Grant (MHCLG)

Business Rates Baseline

Locally Retained Business Rates

Estimated Collection Fund (Surplus)/Deficit Business Rates

Estimated Collection Fund (Surplus)/Deficit Council Tax

Contribution to/ (from) Business Rates Equalisation Reserve

COUNCIL TAX

TAX BASE NUMBER OF PROPERTIES

COUNCIL TAX PER BAND D PROPERTY

GENERAL FUND BALANCE 31 MARCH

2025/26	2026/27	2026/27	2026/27
£'000's	£'000's	£'000's	£'000's
Budget	Gross	Income	Budget
	Expenditure		
3,389	5,275	-2,209	3,066
11,747	24,251	-10,072	14,179
3,710	32,947	-28,525	4,422
3,652	8,756	-4,506	4,250
2,243	2,750	-704	2,046
3,978	6,288	-2,278	4,010
28,719	80,267	-48,294	31,973
-2,768	0	-3,082	-3,082
-1,645	174	-1,051	-877
24,306	80,441	-52,427	28,014
2,512	2,799	0	2,799
1,100	0	0	0
206	206	0	206
-1,432	0	-1,932	-1,932
-1,175	0	-2,457	-2,457
-8	0	0	0
25,509	83,446	-56,816	26,630
25,509	83,446	-56,816	26,630
-1	0	-5,851	-5,851
-36	0	0	0
-155	0	0	0
-676	0	0	0
-4,378	36,301	-40,458	-4,157
-5,246	36,301	-46,309	-10,008
-5,007	158	-558	-400
-192	0	-76	-76
-162	0	-475	-475
192	76	0	76
15,094	119,981	-104,234	15,747
73,355.00			74,305.80
205.77			211.92
3,000			3,000

MEDIUM TERM FINANCIAL PLAN 2025-2027

ANALYSIS OF GROSS PORTFOLIO REQUIREMENTS

2026/27

Community Safety and Wellbeing

Environment and Sustainability

Finance and Corporate

Housing and Homelessness

Leader

Planning and Economy

Employees	Premises	Transport	Supplies and Services	Support Services	Capital Charge	Gross Expenditure	Income	Budget
£,000	£,000	£,000	£,000	£,000	£,000	£,000	£,000	£,000
2,919	797	0	1,080	476	3	5,275	-2,209	3,066
15,177	2,616	4,077	835	914	632	24,251	-10,072	14,179
5,817	683	17	25,946	473	11	32,947	-28,525	4,422
2,573	336	0	5,428	419	0	8,756	-4,506	4,250
1,887	5	2	683	173	0	2,750	-704	2,046
4,660	27	0	869	733	0	6,289	-2,279	4,010
33,033	4,464	4,096	34,841	3,188	646	80,268	-48,295	31,973
2,835	798	0	1,316	501	3	5,453	-2,064	3,389
12,898	2,370	3,651	1,288	925	542	21,674	-9,927	11,747
5,586	361	16	28,870	413	11	35,257	-31,547	3,710
2,548	329	0	5,293	399	0	8,569	-4,917	3,652
1,971	11	2	877	145	0	3,006	-763	2,243
4,450	22	0	878	776	0	6,126	-2,148	3,978
30,288	3,891	3,669	38,522	3,159	556	80,085	-51,366	28,719

Difference in 2025/26 to 2026/27

Community Safety and Wellbeing

Environment and Sustainability

Finance and Corporate

Housing and Homelessness

Leader

Planning and Economy

84	-1	0	-236	-25	0	-178	-145	-323
2,279	246	426	-453	-11	90	2,577	-145	2,432
231	322	1	-2,924	60	0	-2,310	3,022	712
25	7	0	135	20	0	187	411	598
-84	-6	0	-194	28	0	-256	59	-197
210	5	0	-9	-43	0	163	-131	32
2,745	573	427	-3,681	29	90	183	3,071	3,254

MEDIUM TERM FINANCIAL PLAN 2026-2027

CENTRAL SUPPORT SERVICE BUSINESS UNITS

2026/27

	Employees	Premises	Transport	Supplies and Services	Support Services	Capital Charge	Gross Expenditure	External Income	Budget
	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's	£'000's
Human Resources (704)	687	28	1	55	154	0	925	-38	887
Community & Business Improvement (713)	119	3	0	0	5	0	127	0	127
Communications (716)	382	10	0	10	35	0	437	0	437
Legal Services (742)	485	11	1	51	195	0	743	-1	742
Information, Governance and Complaints (72)	197	7	0	4	60	0	268	0	268
Secretarial Services (724)	321	12	0	4	23	0	360	0	360
ICT (736)	1,698	57	2	7	52	0	1,816	-66	1,750
ICT Maint./Licences/Phones (738)	0	0	0	1,725	0	0	1,725	0	1,725
ICT Communications (740)	0	0	0	1,050	15	0	1,065	-6	1,059
Customer Services (732)	392	18	0	3	43	0	456	0	456
Information Offices (731)	377	152	2	13	58	0	602	-1	601
Support Services (762)	239	12	0	16	32	0	299	0	299
Sundry Debtors (766)	136	4	0	22	28	0	190	-1	189
Accountancy (780)	607	20	1	10	75	0	713	-30	683
Internal Health and Safety (822)	207	6	1	23	30	0	267	0	267
Hsg Maint - Shared Support Hub (890)	717	54	2	7	51	0	831	0	831
Hsg Maint - Operations Management (891)	719	77	15	12	61	0	884	0	884
Site Officers (960)	191	12	1	2	31	0	237	0	237
Central Procurement (964)	422	11	1	11	58	0	503	-1	502
Valuers (970)	262	6	3	17	41	0	329	0	329
Property Services (976)	512	14	3	75	121	0	725	-82	643
Building Cleaning - Offices (P255)	88	0	0	2	24	0	114	0	114
	8,758	514	33	3,119	1,192	0	13,616	-226	13,390

MEDIUM TERM FINANCIAL PLAN 2026-2027

GENERAL FUND REVENUE BUDGET -
MOVEMENT IN RESERVES

	Contribution From(-) / To Reserves in 2025/26	Reserve Transfers not required / possible in 2026/27	Contribution From(-) / To Reserves for 2026/27	Use of (-) / Contributions to reserves in 2026/27
	£'000's	£'000's	£'000's	£'000's
Contribution from Reserves				
Community Housing Fund	-13			-13
Open Space Maintenance	-56			-56
Local Plan	-215			-215
Local Plan Design Code	-66			-66
Corporate Priorities - Transformation	-306		306	0
Corporate Priorities - Waste strategy	-346		346	0
Recreation Mitigation	-11			-11
Committed Schemes	-475		420	-55
Strategic Asset Management Plan	0		-131	-131
Local Government Reorganisation	0		-262	-262
Commercial Property Sinking Fund	0		-70	-70
Ukraine Families	-331		159	-172
	-1,819	0	768	-1,051
Contribution to Reserves				
District Council Elections	64			64
Lymington STP	20			20
Commercial Property Sinking Fund	50			50
Insurance	40			40
	174	0	0	174
Total Contribution from (-) / to reserves	-1,645	0	768	-877

MEDIUM TERM FINANCIAL PLAN 2026-2029
GENERAL FUND CAPITAL PROJECTS REQUIREMENTS WITH FINANCING

	Portfolio	PROJECT REQUIREMENTS £			ORIGINAL 2026/27 PROJECT FINANCING £			
		2026/27	2027/28	2028/29	NFDC Resources / Loan	Better Care Fund	Grant / Income	Developer contributions / CIL
Disabled Facilities Grants	HOU (GF)	1,500,000	1,500,000	1,500,000	-	1,500,000	-	-
Sustainability Fund - Unallocated	ENV & SUSTAIN	50,000	50,000	50,000	50,000	-	-	-
Strategic Regional Coastal Monitoring (2025-2027)	ENV & SUSTAIN	2,731,000	147,000	-	-	-	2,731,000	-
Strategic Regional Coastal Monitoring (2027-2033)	ENV & SUSTAIN	-	3,284,000	3,211,000	-	-	-	-
Hurst Spit Beach Shingle Source Study	ENV & SUSTAIN	61,000	61,000	-	-	-	61,000	-
Milford Beach and Cliff Study	ENV & SUSTAIN	100,000	123,000	-	-	-	100,000	-
Hurst Spit BMP	ENV & SUSTAIN	105,000	-	-	-	-	105,000	-
Public Conveniences	ENV & SUSTAIN	1,000,000	1,000,000	-	1,000,000	-	-	-
Vehicle & Plant; Replacement Programme	FIN & CORP	2,947,000	1,012,000	3,458,000	2,947,000	-	-	-
Eling Tide Mill Major Works	FIN & CORP	250,000	500,000	-	250,000	-	-	-
Marsh Lane Depot (Including Electrical Supply)	FIN & CORP	500,000	-	-	500,000	-	-	-
Mitigation Schemes	PLAN & ECON	1,000,000	1,000,000	1,000,000	-	-	-	1,000,000
Infrastructure Projects	PLAN & ECON	1,000,000	1,000,000	1,000,000	-	-	-	1,000,000
Strategic Infrastructure Projects	PLAN & ECON	2,950,000	7,500,000	5,150,000	-	-	-	2,950,000
Arts & Culture Projects	PLAN & ECON	150,000	150,000	150,000	-	-	-	150,000
Dibden Golf Centre	CSWELL	100,000	-	-	100,000	-	-	-
Applemore PSDS	CSWELL	202,000	1,211,000	731,000	82,000	-	120,000	-
TOTAL GENERAL FUND CAPITAL PROGRAMME		14,646,000	18,538,000	16,250,000	4,929,000	1,500,000	3,117,000	5,100,000
LOAN FINANCED				Vehicle & Plant	-2,947,000			14,646,000
RESIDUAL NFDC RESOURCES					1,982,000			

COMMUNITY, SAFETY & WELLBEING
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

		Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
Unit/frequency					
With effect from 1st April 2026 (all shown are excluding VAT)					
<u>Stray Dogs*</u>					
Stray dogs - administration charge	Per event	54.00	60.00	6.00	11.1
Stray dogs - kennelling charge	Per day	26.00	30.00	4.00	15.4
Dog fouling - fixed penalty fee	Per event	50.00	50.00	-	-
<u>Impounding of Livestock</u>					
Fixed penalty per animal	Per event	----- Actual Cost -----			
Feeding charge per animal	Per day	----- Actual Cost -----			
<u>Air Pollution Consent Information</u>					
PPC Pre Application advice	Per hour	48.00	49.50	1.50	3.1
<u>Food Hygiene*</u>					
Food safety re-inspections	Per visit	233.00	242.00	9.00	3.9
Food export certificates	Initial visit	111.00	115.00	4.00	3.6
Food export certificates	Per certificate	50.00	52.00	2.00	4.0
Primary Authority	Per hour	83.00	86.00	3.00	3.6
Primary Authority set up package	Per event	829.00	860.00	31.00	3.7
<u>Drain Clearance/Repair</u>					
Drain clearance/repair (default work)*	Per event	----- Actual Cost of works plus Officer Costs -----			
<u>Private Water Supplies*</u>					
Sampling	Per hour	48.00	49.50	1.50	3.1
<u>Analysis Costs</u>					
Small Domestic Supply	Per event	----- Actual Cost -----			
Check monitoring of large/commercial supplies	Per event	----- Actual Cost -----			
Audit Monitoring of large/commercial supplies	Per event	----- Actual Cost -----			
Risk Assessment	Per hour	48.00	49.50	1.50	3.1
Investigation of water quality failure	Per hour	48.00	49.50	1.50	3.1
Granting of an authorisation	Per hour	48.00	49.50	1.50	3.1
<u>Scrap Metal Dealers *</u>					
Scrap Metal Dealer - Site	Per licence	198.00	204.00	6.00	3.0
Scrap Metal Dealer - Collector	Per licence	146.00	150.00	4.00	2.7

NOTE: VAT. Charges are exclusive of VAT.

Charges which are zero rated or not subject to VAT are marked * either individually or by service.

COMMUNITY, SAFETY & WELLBEING
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from 1st April 2026 (all shown are excluding VAT)	Unit/frequency	Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
CARELINE SERVICES					
One off fee					
Installation (standard)	Per unit	48.00	49.20	1.20	2.5
Installation (specific time/date)	Per unit	66.00	66.00	-	-
Urgent hospital discharge installation	Per unit	55.00	57.75	2.75	5.0
Activation Fee - New digital customers only	Per unit	50.00	52.00	2.00	4.0
Activation Fee - Existing customers (Analogue or digital)	Per unit	25.00	26.00	1.00	4.0
Digital Smart Life Unit	Per unit	250.00	255.00	5.00	2.0
Call out fee (damage and misuse)	Per unit	25.00	30.00	5.00	20.0
Loan pendant - Admin fee (office based)	Per unit	18.00	18.90	0.90	5.0
Loan pendant re-programme - call out fee	Per unit	25.00	26.00	1.00	4.0
Loan pendant re-programme - client re-programme	Per unit	FOC	5.00	5.00	n/a
Lost pendant replacement	Per unit	54.25	55.34	1.09	2.0
Additional user set up fee (post installation)	Per unit	18.00	18.90	0.90	5.0
Call out fee - reinstallation & reprogramming of additional sensors added to existing alarm equip	Per unit	25.00	30.00	5.00	20.0
Equipment disconnection and collection charge	Per unit	35.00	35.00	-	-
Wristband annual fee	Per unit	25.00	25.00	-	-
2 Metre multi socket	Per unit	8.24	8.65	0.41	5.0
5 metre multi socket	Per unit	9.45	9.92	0.47	5.0
Service and equipment rental					
Lifeline rental	Per unit	4.25	4.40	0.15	3.5
Monitoring only	Per unit	2.25	2.35	0.10	4.4
SIM Card - digital only	Per unit	1.00	1.05	0.05	5.0
Fall detector	Per unit	1.59	1.65	0.06	3.8
Smoke Detector - one off payment NEW	Per unit	n/a	25.00	n/a	n/a
Smoke detector	Per unit	0.99	0.99	-	-
Carbon Monoxide Detector - NEW	Per unit	n/a	40.00	n/a	n/a
Carbon monoxide detector monitoring	Per unit	1.85	1.85	-	-
Additional pendant	Per unit	0.85	0.89	0.04	4.7
Easy Press - Tunstall - NEW	Per unit	n/a	6.00	n/a	n/a
Easy Press - Essence - NEW	Per unit	n/a	12.00	n/a	n/a
Wristband	Per unit	0.51	0.51	-	-
Safe socket	Per unit	0.33	0.33	-	-
Replacement charges for damaged or non-returned units					
Community alarm (400 connect, Vi or Reach)	Per unit	157.33	157.33	-	-
Digital Smart Life (unit only)	Per unit	250.00	255.00	5.00	2.0
Pendant (My Amie or Tynetec)	Per unit	54.25	55.34	1.09	2.0
Vi or Vibby fall detector	Per unit	108.50	111.21	2.71	2.5
ID wristband	Per unit	5.00	5.00	-	-
Alarm unit power supply cable	Per unit	27.13	27.81	0.68	2.5
Telephone adaptor	Per unit	5.43	5.43	-	-
BT cable	Per unit	9.77	9.77	-	-
ADSL filter	Per unit	8.68	8.68	-	-
Safe socket	Per unit	10.85	10.85	-	-

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ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from 1st April 2026 (all shown are excluding VAT)				Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
Unit/frequency							
REFUSE SACKS							
Domestic Sacks*	Black	Per roll (of 26)	Per roll (of 26)	7.00	7.25	0.25	3.6
	Clear	Per roll (of 36)	Per roll (of 36)	2.75	2.85	0.10	3.6
GARDEN WASTE COLLECTION FOR COMPOSTING*							
Collection Charge for 12 month period, per 240 litres (to a maximum of 5 bins)			Per annum	70.00	72.50	2.50	3.6
Bin supply charge per bin* - including replacement bins			Per bin	30.00	31.00	1.00	3.3
DOMESTIC BINS - NEW AND REPLACEMENTS*							
Refuse							
140 ltr - refuse			Per bin	n/a	18.00	n/a	n/a
180 ltr - refuse			Per bin	n/a	18.00	n/a	n/a
240 ltr - refuse			Per bin	n/a	18.00	n/a	n/a
360 ltr - refuse			Per bin	n/a	18.00	n/a	n/a
660 ltr - refuse			Per bin	n/a	60.00	n/a	n/a
1100 ltr - refuse			Per bin	n/a	60.00	n/a	n/a
Recycling							
180 ltr - recycling			Per bin	n/a	18.00	n/a	n/a
240 ltr recycling			Per bin	n/a	18.00	n/a	n/a
360 ltr - recycling			Per bin	n/a	18.00	n/a	n/a
660 ltr - recycling			Per bin	n/a	60.00	n/a	n/a
1100 ltr - recycling			Per bin	n/a	60.00	n/a	n/a
Containers for new build or refurbished properties							
Full set of containers (individual property container set)			Per bin	n/a	60.00	n/a	n/a
New build communal 660L refuse bin			Per bin	n/a	380.00	n/a	n/a
New build communal 1100L refuse bin			Per bin	n/a	400.00	n/a	n/a
New build communal 660L recycling bin			Per bin	n/a	380.00	n/a	n/a
New build communal 1100L recycling bin			Per bin	n/a	400.00	n/a	n/a
Food							
23L Caddy - no charge			Per bin	n/a	NIL CHARGE	n/a	n/a
Glass boxes - no charge			Per bin	n/a	NIL CHARGE	n/a	n/a
SPECIAL COLLECTIONS*							
Special Collection (1 item)			One item	47.00	49.00	2.00	4.3
extra items (per item - maximum of eight)			Additional items	12.50	13.00	0.50	4.0
1 free collection up to 3 items per household claiming benefits							
# 48 hours notice must be given to qualify for refund.							

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ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

		Current Charge 2025/26	Proposed Charge 2026/27	Increase	Increase	
With effect from 1st April 2026 (all shown are excluding VAT)		£	£	£	%	
Unit/frequency						
<u>BEACH HUTS</u>						
Licence Transfer Fee						
Licence transfer fee - all sites (Standard beach hut sale)	Per Transfer	621.67	621.67	-	-	
Licence transfer fee - all sites (Following licensee death)	Per Transfer	621.67	621.67	-	-	
Site Rent Residents						
Milford-on-Sea	concrete (per standard hut)	Per hut, per annum	673.33	699.17	25.84	3.8
Barton-on-Sea	up to 5.0 sq.m		606.67	630.00	23.33	3.8
	5.01 - 7.0 sq.m		669.17	694.17	25.00	3.7
	7.01 - 12.0 sq.m		749.17	777.50	28.33	3.8
	12.01 - 14.0 sq.m		798.33	828.33	30.00	3.8
	14.1 - 16.0 sq.m		839.17	870.83	31.66	3.8
	over 16.0 sq.m		877.50	910.83	33.33	3.8
Calshot & Hordle Cliff	up to 5.0 sq.m		606.67	630.00	23.33	3.8
	5.01 - 7.0 sq.m		669.17	694.17	25.00	3.7
	7.01 - 12.0 sq.m		749.17	777.50	28.33	3.8
	12.01 - 14.0 sq.m		798.33	828.33	30.00	3.8
	14.1 - 16.0 sq.m		839.17	870.83	31.66	3.8
	over 16.0 sq.m		877.50	910.83	33.33	3.8
Site Rent Non - Residents						
Milford-on-Sea	concrete (per standard hut)	Per hut, per annum	1,058.33	1,098.33	40.00	3.8
Barton-on-Sea	up to 5.0 sq.m		985.00	1,022.50	37.50	3.8
	5.01 - 7.0 sq.m		1,059.17	1,098.33	39.16	3.7
	7.01 - 12.0 sq.m		1,153.33	1,195.83	42.50	3.7
	12.01 - 14.0 sq.m		1,218.33	1,263.33	45.00	3.7
	14.1 - 16.0 sq.m		1,265.83	1,312.50	46.67	3.7
	over 16.0 sq.m		1,311.67	1,360.00	48.33	3.7
Calshot & Hordle Cliff	up to 5.0 sq.m		985.00	1,022.50	37.50	3.8
	5.01 - 7.0 sq.m		1,059.17	1,098.33	39.16	3.7
	7.01 - 12.0 sq.m		1,153.33	1,195.83	42.50	3.7
	12.01 - 14.0 sq.m		1,218.33	1,263.33	45.00	3.7
	14.1 - 16.0 sq.m		1,265.83	1,312.50	46.67	3.7
	over 16.0 sq.m		1,311.67	1,360.00	48.33	3.7
<u>COASTAL</u>						
School, College and University Coastal Education Talks						
On site talk by Coastal Engineer*	Per event	100.00	100.00	-	-	
<u>PEST CONTROL</u>						
<u>Rodent Control</u>						
Domestic Premises	Call out/Survey and up to 3 additional visits #	166.67	175.00	8.33	5.0	
	Single additional visit	45.83	50.00	4.17	9.1	
Business Premises	Call out and survey	166.67	175.00	8.33	5.0	
	Treatment via quote for visits or annual contract	<---Subject to quotation--->				
# 50% reduction to those on recognised benefits (rodent control)						
<u>Insect Control</u>						
Wasps and Hornets - complete treatment	Per Visit	100.00	104.17	4.17	4.2	
15 mins visit per operative (fleas, wasps, carpet moths and carpet)	Per Visit	29.17	33.33	4.16	14.3	
Fleas - carpet moths & carpet beetles - Call Out and single treatment	Per Visit	120.83	125.00	4.17	3.4	
Bed Bugs - Call Out and Survey	Per Visit	91.67	95.83	4.17	4.5	
Bed Bugs - Treatment	Per Visit	----- Subject to quotation -----				

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ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

	Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
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With effect from 1st April 2026 (all shown are excluding VAT)

CEMETERIES*

The fees shown below are applicable to those who have resided within New Forest District.

Those who qualify for the Resident Fees will incur the 50% discount. Non-Resident Applicants will incur the Fee in full.

For a full breakdown of the criteria qualifying Resident Fees please consult the current Cemetery Regulations.

Interment Fees

Interment of ashes in cremated remains section
Interment of ashes in a grave or woodland grave

* Child (up to and including 17 years). NFDC claim all child-related fees from the Children's Funeral Fund for England. These fees are for information only.

Person over 17 years:

Single / double depth grave
Single / double depth grave in a traditional kerbed section - within specific
Use of memorial garden
Burial chamber for uncoffined burials
Postponement or cancellation (less than 48 working hours notice)
Burial on Saturday
Single depth only interment requiring 2 grave spaces

420.00	436.00	16.00	3.8
420.00	436.00	16.00	3.8
Fee dependent upon interment	Fee dependent upon interment	-	-
905.00	940.00	35.00	3.9
1,155.00	1,200.00	45.00	3.9
135.00	140.00	5.00	3.7
2,140.00	2,225.00	85.00	4.0
Interment Fee	Interment Fee	-	-
Interment Fee + 50%	Interment Fee + 50%	-	-
n/a	1,880.00	n/a	n/a

Purchase of Exclusive Right of Burial (EROB)

Cremated remains section
Woodland cremated remains section

* Single depth child grave within the Children's Section. NFDC claim all child-related fees from Children's Funeral Fund for England. These fees are for information only

Lawn and woodland sections
Eling & Calshot single / double lawn grave - including memorial ground support
Traditional kerbed section - within specific sections and cemeteries
Purchase of a burial plot requiring 2 grave spaces

475.00	495.00	20.00	4.2
610.00	635.00	25.00	4.1
Fee dependent upon plot type.	Fee dependent upon plot type.	-	-
1,160.00	1,205.00	45.00	3.9
1,275.00	1,325.00	50.00	3.9
1,810.00	1,880.00	70.00	3.9
2 burial plot fees	2 burial plot fees	-	-

Additional Administration of Exclusive Right of Burial

Family organised interment - administration
Location of burial plot selected by purchaser
Assignment / Transfer of EROB
Re-issue of EROB
Surrender or cancellation of EROB - pro-rata refund

195.00	205.00	10.00	5.1
295.00	310.00	15.00	5.1
185.00	195.00	10.00	5.4
75.00	78.00	3.00	4.0
No charge	No charge	-	-

Memorial Fees

Permission to erect or amend a memorial
years). NFDC claim all child-related fees from Children's Funeral Fund for England.
Permission to erect or amend a memorial with kerbstone in designated
traditional sections only - with application
Permission for offsite repair or maintenance of memorial - with application
Permission for *insitu* repair or maintenance of memorial - with application
Purchase of a woodland plaque and vase with plinth +VAT - with application
Purchase of a woodland or a memorial garden plaque only +VAT - with application
Purchase of an NFDC owned memorial bench plaque only +VAT - with application

225.00	235.00	10.00	4.4
225.00	235.00	10.00	4.4
450.00	470.00	20.00	4.4
75.00	78.00	3.00	4.0
No charge	No charge	-	-
POA	POA	-	-
POA	POA	-	-
POA	POA	-	-

Sundry Fees

Use of chapel - included in interment fee and subject to availability
Research fees per hour - minimum 1 hour

105.00	110.00	5.00	4.8
75.00	78.00	3.00	4.0

* NFDC claim **all** child-related fees from Children's Funeral Fund for England. These fees are for information only.

For further information: <https://www.gov.uk/child-funeral-costs>

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ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from 1st April 2026 (all shown are excluding VAT)				Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
Unit/frequency							
ABANDONED VEHICLES*							
Removal							
Less than 3.5 tonnes		On-road	Per vehicle	192.00	210.00	18.00	9.4
		On-road, damaged	Per vehicle	320.00	350.00	30.00	9.4
		Off-road	Per vehicle	256.00	280.00	24.00	9.4
		Off-road, damaged	Per vehicle	384.00	420.00	36.00	9.4
3.5 to 7.5 tonnes		On-road	Per vehicle	256.00	280.00	24.00	9.4
		On-road, damaged	Per vehicle	832.00	915.00	83.00	10.0
		Off-road	Per vehicle	512.00	560.00	48.00	9.4
		Off-road, damaged	Per vehicle	1,089.00	1,200.00	111.00	10.2
7.5 to 18 tonnes		On-road	Per vehicle	448.00	490.00	42.00	9.4
		On-road, damaged	Per vehicle	2,561.00	2,815.00	254.00	9.9
	Unladen	On-road, damaged	Per vehicle	3,842.00	4,225.00	383.00	10.0
	Laden	On-road, damaged	Per vehicle	3,842.00	4,225.00	383.00	10.0
	Unladen	Off-road	Per vehicle	1,281.00	1,410.00	129.00	10.1
	Laden	Off-road	Per vehicle	1,921.00	2,110.00	189.00	9.8
	Unladen	Off-road, damaged	Per vehicle	3,842.00	4,225.00	383.00	10.0
	Laden	Off-road, damaged	Per vehicle	5,763.00	6,340.00	577.00	10.0
More than 18 tonnes		On-road	Per vehicle	448.00	490.00	42.00	9.4
		On-road, damaged	Per vehicle	3,842.00	4,225.00	383.00	10.0
	Laden	On-road, damaged	Per vehicle	5,763.00	6,340.00	577.00	10.0
	Unladen	Off-road	Per vehicle	1,921.00	2,110.00	189.00	9.8
	Laden	Off-road	Per vehicle	2,561.00	2,815.00	254.00	9.9
	Unladen	Off-road, damaged	Per vehicle	5,763.00	6,340.00	577.00	10.0
	Laden	Off-road, damaged	Per vehicle	7,684.00	8,450.00	766.00	10.0
Storage - per day							
	Two wheeled	Per day		13.00	15.00	2.00	15.4
	Less than 3.5 tonnes	Per day		26.00	30.00	4.00	15.4
	3.5 to 7.5 tonnes	Per day		32.00	36.00	4.00	12.5
	7.5 to 18 tonnes	Per day		38.00	42.00	4.00	10.5
	More than 18 tonnes	Per day		45.00	50.00	5.00	11.1
Disposal							
	Two wheeled	Per vehicle		64.00	70.00	6.00	9.4
	Less than 3.5 tonnes	Per vehicle		96.00	105.00	9.00	9.4
	3.5 to 7.5 tonnes	Per vehicle		128.00	140.00	12.00	9.4
	7.5 to 18 tonnes	Per vehicle		160.00	175.00	15.00	9.4
	More than 18 tonnes	Per vehicle		192.00	210.00	18.00	9.4

NOTE: VAT. Charges are exclusive of VAT.

Charges which are zero rated or not subject to VAT are marked * either individually or by service.

ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

	Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %	
With effect from 1st April 2026 (all shown are excluding VAT)					
Unit/frequency					
<u>ABANDONED SHOPPING TROLLEYS</u>					
Collected by owner	Per trolley	25.00	25.00	-	-
Returned by Council	Per trolley	35.00	35.00	-	-
Destroyed by Council	Per trolley	55.00	55.00	-	-
Recovered from difficult location	<-----Actual cost----->				
<u>CLEAN NEIGHBOURHOODS & THE ENVIRONMENT*</u>					
Full charge:					
Nuisance parking	Per event	100.00	n/a	n/a	n/a
Abandoning a vehicle	Per event	200.00	200.00	-	-
Leaving litter	Per event	100.00	120.00	20.00	20.0
Throwing litter from a vehicle	Per event	100.00	120.00	20.00	20.0
Graffiti and fly posting	Per event	80.00	n/a	n/a	n/a
Domestic waste receptacle offences	Per event	80.00	80.00	-	-
Industrial and commercial waste receptacle offences	Per event	110.00	110.00	-	-
Dog fouling (currently made under the Dogs (Fouling of Land) Act 1996)	Per event	50.00	n/a	n/a	n/a
Dog fouling (only applicable if the Council decide to issue Dog Control Orders under this legislation)	Per event	80.00	80.00	-	-
Discounted charge if paid within 10 days of issue:					
Nuisance parking	Per event	75.00	n/a	n/a	n/a
Abandoning a vehicle	Per event	150.00	150.00	-	-
Leaving litter	Per event	60.00	70.00	10.00	16.7
Throwing litter from a vehicle	Per event	60.00	70.00	10.00	16.7
Graffiti and fly posting	Per event	60.00	n/a	n/a	n/a
Domestic waste receptacle offences	Per event	60.00	60.00	-	-
Industrial and commercial waste receptacle offences	Per event	80.00	80.00	-	-
Noise from domestic premises	Per event	80.00	80.00	-	-
Dog fouling(only applicable if the Council decide to issue Dog Control Orders under this legislation)	Per event	50.00	50.00	-	-
<u>ENVIRONMENTAL ENFORCEMENT - FIXED PENALTY CHARGES*</u>					
Full charge:					
Environmental Protection Act 1990;					
Unauthorised deposit of waste (S.33ZA)	Per event	800.00	1,000.00	200.00	25.0
Failure to produce waste documentation (S.34A)	Per event	300.00	300.00	-	-
Household Duty of Care (S.34ZA)	Per event	200.00	300.00	100.00	50.0
Control of Pollution (Amendment) Act 1989					
Failure to produce authority to carry waste (waste carriers licence) (S5B)	Per event	300.00	300.00	-	-
Anti-Social Behaviour, Crime and Policing Act 2014					
Failure to comply with a Community Protection Notice (S.52)	Per event	100.00	100.00	-	-
Failure to comply with a Public Space Protection Order (S.68)	Per event	100.00	100.00	-	-
Discounted charge if paid early:					
Environmental Protection Act 1990;					
Unauthorised deposit of waste (S.33ZA)	Per event	400.00	500.00	100.00	25.0
Failure to produce waste documentation (S.34A)	Per event	225.00	225.00	-	-
Household Duty of Care (S.34ZA)	Per event	120.00	150.00	30.00	25.0
Control of Pollution (Amendment) Act 1989					
Failure to produce authority to carry waste (waste carriers licence) (S5B)	Per event	225.00	225.00	-	-
Anti-Social Behaviour, Crime and Policing Act 2014					
Failure to comply with a Community Protection Notice (S.52)	Per event	75.00	75.00	-	-
Failure to comply with a Public Space Protection Order (S.68)	Per event	75.00	75.00	-	-
<u>SACKS</u>					
Dog Waste Bags	Per 50 Sacks	0.95	1.00	0.05	5.3
<u>ROAD CLOSURES*</u>					
Road closure Order (TPCA 1847)	Per event	190.00	197.00	7.00	3.7

NOTE: VAT. Charges are exclusive of VAT.
Charges which are zero rated or not subject to VAT are marked * either individually or by service.

ENVIRONMENT & SUSTAINABILITY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

		Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %	
With effect from 1st April 2026 (all shown are excluding VAT)						
<u>TRADE WASTE CHARGES*</u>						
<u>REFUSE*</u>						
Green Sacks	Per Roll - 10 sacks	24.00	24.90	0.90	3.7	
	Box of 30 rolls	499.00	518.00	19.00	3.8	
Delivery Charge	Sack delivery charge (orders under £40)	7.00	7.25	0.25	3.6	
	Sack delivery charge (orders over £40)	Free	Free	Free	-	
	Charge Band	No. sacks per week				
Regular Collection Green Sacks (charges per week)	A	0-15	24.50	25.40	0.90	3.7
	B	16-30	43.00	44.60	1.60	3.7
	C	31-45	63.00	65.30	2.30	3.7
	D	45-60	80.00	83.00	3.00	3.8
1100 litre bin (charges per annum)	Weekly Collection	n/a	28.68	n/a	n/a	
	Fortnightly Collection	n/a	28.68	n/a	n/a	
	Monthly Collection	n/a	28.68	n/a	n/a	
<u>MIXED RECYCLING (cans, paper, card, plastic bottle)</u>						
Clear Sacks	Per Roll - 36 sacks	31.00	32.20	1.20	3.9	
Stickers (Recycling stickers (for affixing to bundles of cardboard))	Per Roll - 36 stickers	31.00	32.20	1.20	3.9	
Delivery Charge	Sack/sticker delivery charge (orders under £40)	7.00	7.25	0.25	3.6	
	Sack/sticker delivery charge (orders over £40)	Free	Free	n/a	n/a	
1100 litre bin (charges per annum)	Weekly Collection	759.00	788.00	29.00	3.8	
	Fortnightly Collection	397.00	412.00	15.00	3.8	
	Monthly Collection	324.00	336.00	12.00	3.7	
<u>GLASS RECYCLING*</u>						
1100 litre bin (charges per annum)	Fortnightly Collection	324.00	336.00	12.00	3.7	
	Monthly Collection	161.00	167.00	6.00	3.7	
360 litre bin (charges per annum)	Fortnightly Collection	133.00	138.00	5.00	3.8	
	Monthly Collection	79.00	82.00	3.00	3.8	
240 litre bin (charges per annum)	Fortnightly Collection	96.50	100.20	3.70	3.8	
	Monthly Collection	60.00	62.30	2.30	3.8	

FINANCE & CORPORATE PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from 1st April 2026 (all shown are excluding VAT)		Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
<u>Appletree Court*</u>					
Meeting Room / Council Chamber	per session	75.00	75.00	-	-
Interview Room	per session	50.00	50.00	-	-
Evening Supplement	per hour	25.00	25.00	-	-
<u>New Milton Town Hall*</u>					
Meeting Room / Council Chamber	per session	75.00	75.00	-	-
Interview Room	per session	50.00	50.00	-	-
Evening Supplement	per hour	25.00	25.00	-	-
<u>Ringwood Gateway</u>					
Meeting Room / Council Chamber	per session	n/a	n/a		
Interview Room	per session	n/a	n/a		
Evening Supplement	per hour	n/a	n/a		
<u>Lymington Town Hall</u>					
Meeting Room / Council Chamber	per session	75.00	75.00	-	-
Interview Room	per session	50.00	50.00	-	-
Evening Supplement	per hour	25.00	25.00	-	-

Facilities are available to book by partner organisations or specific user groups, and are not permitted for use by general public.

Three sessions per day: morning (09:00 to 12:00noon), afternoon (12:00noon to 16:00) and evening (16:00 to 21:00)

A discount may be applied to charity bookings, these will be reviewed on a case by case basis.

For bookings that span more than one session, a 25% discount will be applied across the total booking cost.

HOUSING AND HOMELESSNESS SERVICE
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from April 2026 (all shown are excluding VAT)		Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
<u>Stillwater Park Site*</u>					
Site Licence Fees	Per site, annual	51.36	53.31	1.95	3.8
Service Charges	Per site, annual	4.82	5.00	0.18	3.7

NOTE: VAT. Charges are exclusive of VAT.

Charges which are zero rated or not subject to VAT are marked * either individually or by service.

PLANNING & ECONOMY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

With effect from 1st April 2026 (all shown are excluding VAT)		Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
Unit/frequency					
<u>LAND CHARGES</u>					
Residential					
LLC1 Only *	Per event	47.00	55.00	8.00	17.0
CON29R	Per event	115.00	135.00	20.00	17.4
Commercial					
LLC1 Only *	Per event	58.00	68.00	10.00	17.2
CON29R	Per event	145.00	170.00	25.00	17.2
Other Enquiries					
CON29O	Per event	27.00	33.00	6.00	22.2
CON29O HCC questions (all three conditions)	Per event	84.00	99.00	15.00	17.9
Solicitors own written enquiries (per question)	Per event	54.00	66.00	12.00	22.2
Each additional parcel of land (Residential & Commercial)					
LLC1 Only *	Per event	5.75	6.75	1.00	17.4
CON29R	Per event	22.00	24.50	2.50	11.4
Large Site/Complex Search					
LLC1 Only *	Per event	205.00	240.00	35.00	17.1
CON29R	Per event	430.00	500.00	70.00	16.3
<u>PERSONAL SEARCHES</u>					
Personal searches are undertaken under the Environmental Information Regulations and, therefore, no fee applies					
<u>BUILDING CONTROL</u>					
Fees					
Copy Completion Certificate	Per event	45.00	50.00	5.00	11.1
Re-open Archived Application	Per event	246.00	255.00	9.00	3.7
Re-direct Inspection	Per event	65.00	70.00	5.00	7.7
Consultancy					
Consultancy	per hour	82.00	85.00	3.00	3.7

PLANNING & ECONOMY PORTFOLIO
PROPOSED SCALE OF FEES AND CHARGES FOR 2026/27

	Unit/frequency	Current Charge 2025/26 £	Proposed Charge 2026/27 £	Increase £	Increase %
With effect from 1st April 2026 (all shown are excluding VAT)					
<u>STREET NAME PLATES</u>					
Basic	Per event	462.00	508.00	46.00	10.0
Special	Per event	Actual Cost	Actual Cost		
<u>Street Number Plates</u>					
	Per event	393.00	432.00	39.00	9.9
<u>STREET NAMING & NUMBERING*</u>					
Fees					
New dwelling/first plot on multi plot site	Per event	85.00	105.00	20.00	23.5
Additional 2-100 dwellings	Per event	35.00	42.00	7.00	20.0
New dwelling in excess of 100	Per event	Bespoke fee on application			
New commercial building/first building on multi plot site	Per event	85.00	105.00	20.00	23.5
Additional 2-20 buildings	Per event	45.00	52.00	7.00	15.6
New commercial buildings in excess of 20	Per event	Bespoke fee on application			
Property name change per property	Per event	85.00	105.00	20.00	23.5
Changes to new address if changed after schedule issued (per plot)	Per event	35.00	42.00	7.00	20.0

DEVELOPMENT MANAGEMENT

Solicitor enquiries

S106 compliance fees

Condition compliance fees

First Homes admin fee (incl log book fee of £50) - New Fee

Per event	298.00	309.00	11.00	3.7
Per event	298.00	309.00	11.00	3.7
Per unit		175.00	n/a	n/a

NOTE: the new condition compliance fee will be incorporated within S106 fee where requests are made for both

Unilateral Undertakings

Unilateral Undertaking checking fees

Per event	150.00	150.00	-	-
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Pre-application advice

householder

1 dwelling

2 dwelling

3 dwellings

Listed building advice

Tree advice

Listed building advice (with 1 site visit)

Per event	64.50	64.50	-	-
Per event	300.00	300.00	-	-
Per event	450.00	450.00	-	-
Per event	550.00	550.00	-	-
Per event	60.00	65.00	5.00	8.3
Per event	60.00	65.00	5.00	8.3
Per event		150.00	n/a	n/a

NOTE: current fees are based on 25% of 2024 planning application fees as per current charges (not proposed to change for householder)

NOTE: all other planning pre-application fees remain as published on our website

Enforcement

Enforcement notice checks

Request to withdraw notice

Per event	355.00	355.00	-	-
Per event	620.00	620.00	-	-

NOTE: VAT. Charges are exclusive of VAT.

Charges which are zero rated or not subject to VAT are marked * either individually or by service.

Council – 26 February 2026

Liberal Democrat Alternative Budget 2026/27

Purpose	For Decision
Classification	Public
Executive Summary	The report proposes additions to the budget as currently outlined by the Administration. The Liberal Democrat Party believes that the proposed budget additions go further to support the residents of the New Forest and further support the delivery of agreed Corporate Plan objectives. The proposals result in an increased General Fund budget requirement at Portfolio level of £770,000 for 2026/27 and £150,000 per annum thereafter, and an increase to the Capital Programme of £1.050 million.
Recommendation(s)	1. That the Council approves the alternative General Fund budget, as laid out in the report and as summarised within appendix 1.
Reasons for recommendation(s)	The Liberal Democrat party believes the Council can go further in terms of supporting the needs of the residents of the New Forest through the approval of an alternative General Fund budget.
Ward(s)	All
Portfolio Holder(s)	N/A
Strategic Director(s)	Alan Bethune – Strategic Director Corporate Resources (Section 151 Officer)
Officer Contact	Paul Whittles Assistant Director – Finance (Deputy Section 151 Officer) 02380 285766 paul.whittles@nfdc.gov.uk

Introduction and background

1. The Liberal Democrat Party Councillors have considered the administration's proposed budget for 2026/27 and would like to propose several items which they believe should be included in the Medium Term Financial Plan and within an amended approved budget for 2026/27.
2. The Leader of the Main Opposition Group, Cllr Malcolm Wade has represented the views of the group in the preparation of the alternative budget. The Council's Section 151 Officer has supported Cllr Wade in the construction of the alternative budget.

Alternative Budget Proposals at Portfolio Level

3. Community Safety & Well Being

- a. Youth Hubs: +£50,000 (revenue)
 - i. Engage with Hampshire County Council (HCC) and other partners and provide additional funding for more youth and family hubs, with focus on school holidays, with meal and activity funding throughout District.
- b. Best Start Hubs: +£500,000 (revenue)
 - i. Working with Hampshire County Council providing a one-off revenue contribution of £500,000 towards their Best Start Hubs programme to facilitate delivery in the New Forest District.
- c. Provision of 'Health Bus': +£120,000 (£70,000 revenue and £50,000 capital)
 - i. Working in partnership with Town and Parish Councils, this Council would purchase and forward fund for 12 months a "Health Bus" to Lymington/Southampton hospitals. Seed capital and 12 months supporting revenue budget by NFDC, subject to being revenue funded by town and parishes thereafter.
- d. Community Warm Spaces Grant Programme: +£1m (capital)
 - i. Grant scheme aimed at town/parish councils to create additional community spaces that are energy-efficient and can be used as warm hubs for the community. Extension to warm spaces scheme so that all NFDC community facilities have a warm space area.

4. **Finance & Corporate Services**

- a. Extended Business Rate Relief: +£100,000 (revenue)
 - i. Introduce extended business rate relief to encourage businesses to purchase and use empty shops in our communities thus supporting local employment/economy.

5. **Planning & Economy**

- a. Car Parking Charges Review: +£50,000 (revenue)
 - i. Provide funding for a commissioned review to evaluate the impacts that the Councils town centre car parking charges has to the economies of local Town centre areas. Ultimately seek to use the review outcomes to inform a Parking Strategy to take into the new post LGR unitary authority.

Summary of the proposed amendments

- 6. The proposed amendments as outlined above (and summarised in table 1 below) would add an additional £770,000 to the Council's General Fund Revenue budget in 2026/27 reducing to £150,000 per annum thereafter. The addition to the capital programme across 2026/27 and 2027/28, funded through the Capital Programme Reserve, would be £1.050 million.

Table 1

Item	Paragraph	General Fund		
		One-off revenue	Ongoing revenue	Capital
Youth hubs	3a		50,000	
Best Start Hubs	3b	500,000		
Health bus	3c	70,000		50,000
Community Warm Spaces	3d			1,000,000
Business Rate Relief/Incentives	4a		100,000	
Car Parking Charges Impact Review	5a	50,000		
Total		620,000	150,000	1,050,000
Total General Fund 2026/27			770,000	1,050,000
Total General Fund 2027/28			150,000	
Total General Fund 2028/29			150,000	

7. The alternative budget proposes to fund the £770,000 General Fund revenue additions to 2026/27 from the Corporate Priorities reserve. Ultimately the on-going revenue impacts would increase the Councils Medium Term Financial Plan by deficit £150,000.

Corporate plan priorities

8. It is the view of the Liberal Democrat Councillors that the additions to the budget further supplement the achievement of the priorities as included within the Council's adopted Corporate Plan.

Options appraisal

9. The option to replace any funded activities within the administration's proposed budget, as opposed to add to was considered, but not seen as a viable option.

Consultation undertaken

10. None.

Financial and resource implications

11. Currently the administration has earmarked the use of the Corporate Priorities reserve to support financing the Public Convenience Refurbishment Programme. The alternative budget proposes that £770,000 of the Public Convenience Refurbishment Programme instead be funded through the Capital Programme Reserve, freeing up the equivalent amount from the Corporate Priorities reserves to pay for the proposed 2026/27 amendments.
12. The direct addition of £1.050 million (paragraphs 3c and 3d) to the Capital Programme would directly necessitate additional external borrowing to facilitate Treasury Management cashflow. As a result, additional borrowing charges would be incurred and so would need to be brought into the General Fund budget, above the additional £770,000 / £150,000 outlined. As the timing of the spend is not yet clear and the full Capital and Treasury Management Strategies not re-worked, the additional costs of interest have not been factored in at this time but could be covered short-term through the small General Fund contingency held within the Council's substantive budget.
13. There would likely be additional resource implications to consider as the Council's establishment level is designed to fulfil the priorities and service delivery according to the proposed budget, as opposed to the alternative budget.
14. Impact to the Section 25 Statement:

- a. It is the view of the Council's Section 151 Officer that the changes as proposed are not of material consequence to the section 25 statement as included within the substantive proposed budget report.

Legal implications

15. There are none directly arising from this report.

Risk assessment

16. Whilst no formal risk assessment has been completed, a few uncertainties / risks have been identified:
 - a. There is uncertainty as to whether the County Council would have the resource capacity to utilise the additional £500,000 funding being proposed to supplement the Best Start hubs programme. There is a risk therefore that despite the funding being made available, it may not be used in a timely fashion by the County Council.
 - b. There is a risk that Town/Parish councils would be unable to sustain the provision of the Health Bus beyond the 1 year forward funding period.
 - c. There is a risk that required and necessary diligence and oversight of the Community Warm Spaces grant programme may detract resource from other corporate priority areas.

Environmental / Climate and nature implications

17. There are none directly arising from this report.

Equalities implications

18. The proposed amendments aligned to the Youth Hubs and Best Start programme have the potential to improve equal opportunities to a range of residents within the District who may otherwise be prevented from accessing these services due to financial constraints.

Crime and disorder implications

19. There are none.

Data protection / Information governance / ICT implications

20. There are none.

Appendices:

Appendix 1 – Alternative General
Fund Summary

Background Papers:

MTFP and Annual Budget 2026/27

MEDIUM TERM FINANCIAL PLAN 2026-2027

ALTERNATIVE GENERAL FUND BUDGET 2026/27

	2026/27 £'000's Budget	2026/27 Paragraph Ref	2026/27 £'000's Budget Changes	2026/27 £'000's Alternative Budget
PORTFOLIO REQUIREMENTS				
Community Safety and Wellbeing	3,066	3	620	3,686
Environment and Sustainability	14,179			14,179
Finance and Corporate	4,422	4	100	4,522
Housing and Homelessness	4,250			4,250
Leader	2,046			2,046
Planning and Economy	4,010	5	50	4,060
	31,973	-	770	32,743
Reversal of Depreciation	-3,082	-	0	-3,082
Contribution to/(from) Earmarked Revenue Reserves	-877	-	0	-877
Contribution to Reserves	0	-	0	0
NET PORTFOLIO REQUIREMENTS	28,014	-	770	28,784
Minimum Revenue Provision	2,799	-	0	2,799
Contribution to Capital Programme Financing (RCCO)	0	-	0	0
Interest Costs	206	-	0	206
Interest Earnings	-1,932	-	0	-1,932
Waste Services Grant	-2,457	-	0	-2,457
Other grants	0	-	0	0
GENERAL FUND NET BUDGET REQUIREMENTS	26,630	-	770	27,400
<u>COUNCIL TAX CALCULATION</u>				
Budget Requirement	26,630	-	770	27,400
Less:				
Settlement Funding Assessment				
Revenue Support Grant	-5,851	-	0	-5,851
Business Rates Baseline	-4,157	-	0	-4,157
	-10,008	-	0	-10,008
Locally Retained Business Rates	-400	-	0	-400
Corporate Priorities Reserve	0	-	-770	-770
Estimated Collection Fund (Surplus)/Deficit Business Rates	-76	-	0	-76
Estimated Collection Fund (Surplus)/Deficit Council Tax	-475	-	0	-475
Contribution to/ (from) Business Rates Equalisation Reserve	76	-	0	76
COUNCIL TAX	15,747	-	0	15,747
TAX BASE NUMBER OF PROPERTIES	74,305.80			74,305.80
COUNCIL TAX PER BAND D PROPERTY	211.92			211.92
GENERAL FUND BALANCE 31 MARCH	3,000			3,000

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Cabinet – 18 February 2026

Lymington and Pennington Neighbourhood Plan – Making the Plan (Referendum and Decision on Adoption)

Purpose	For Decision
Classification	Public
Executive Summary	This paper seeks approval for the Lymington and Pennington Neighbourhood Plan to be 'made' (adopted) for New Forest District (Outside the National Park). The public referendum took place on 29 January 2026 and 92.5% of recorded votes answered 'yes'. Turnout was 17.1%. As the majority of those voted (i.e. over 50%) are in favour of the draft Neighbourhood Plan, then the Plan should be 'made' (adopted) by both the New Forest District Council (NFDC) and the New Forest National Park Authority (NFNPA) within 8 weeks of the referendum date. This will enable the Plan to become part of the statutory Development Plan, guiding future planning decisions.
Recommendations	That Cabinet recommends that the Council: 1. Notes the outcome of the referendum of 29 January 2026; and 2. Agrees that the Lymington and Pennington Neighbourhood Plan be 'made' (adopted) as part of the Development Plan for New Forest District (Outside the National Park).
Reasons for recommendation	To move forward to the adoption of the Lymington and Pennington Neighbourhood Plan and for it to become part of the statutory Development Plan.
Ward(s)	Lymington, Pennington
Portfolio Holder(s)	Councillor Derek Tipp – Portfolio Holder for Planning and Economy

Strategic Director(s)	Tracey Coleman – Interim Strategic Director for Place, Operations and Sustainability
Officer Contact	Andrew Herring Senior Policy Planner andrew.herring@nfdc.gov.uk James Smith Planning Policy Team Leader james.smith@nfdc.gov.uk Debbie Everett Electoral Services Manager debbie.everett@nfdc.gov.uk

Introduction

1. The purpose of this report is to consider whether the Lymington and Pennington Neighbourhood Plan should be made part of the Development Plan for New Forest District (i.e. adopted) following the outcome of the referendum held on 29 January 2026. The formal making of a neighbourhood plan (Regulation 18 Final Version - May 2024) is provided for under the Neighbourhood Planning (General) Regulations 2012 (as amended) and the Town and Country Planning Act 1990 (as amended).
2. The version of the Plan subject to this report can be found in Appendix 1.
3. It should be noted that as the designated Neighbourhood Plan Area falls partly (approximately one-third of the parish) within the New Forest National Park, the New Forest National Park Authority (NPA) are going through a similar process for the part of the parish within its planning jurisdiction.

Background

4. Neighbourhood plans were introduced by the Localism Act 2011 to give communities direct power to shape the development of their local area. Neighbourhood plans are planning documents that, once adopted, will then become part of the statutory 'development plan' for the area alongside the Local Plan. Local planning authorities and planning inspectors considering planning applications or appeals must make their decisions in accordance with the policies of the development plan, unless material considerations indicate otherwise.

5. The Lymington and Pennington Neighbourhood Plan 'Neighbourhood Area' was designated in September 2015 and covers the whole of the Parish.
6. Work on the Lymington and Pennington Neighbourhood Development Plan has been overseen locally by a steering group of town councillors and community representatives. The Town Council commenced a series of working groups throughout 2016 and 2017, and steering group work continued with help and input from consultants from 2018 until 2023 when informal consultations took place on draft NP content. Formal public consultation took place on an initial Pre-Submission (Regulation 14) Neighbourhood Plan between 7 August 2024 and 9 October 2024. Following the submission of the draft Neighbourhood Plan to the two local planning authorities in March 2025, the Plan was subject to a final 6-week public consultation between 18th April and 30th May 2025.
7. The representations made during this final consultation and various supporting documents (including a Consultation Statement and a Basic Conditions Statement) were submitted to the independent Examiner for consideration on 13 June 2025.
8. The district council (with the National Park Authority) has had a role in providing advice and assistance to the Town Council in producing its Neighbourhood Plan, as required by paragraph 3 of Schedule 4B to the Town and Country Planning Act 1990 (as amended).

Examination

9. The Examiner was required to assess whether the Neighbourhood Plan meets the 'basic conditions', which are that it should:
 - have regard to national policy
 - contribute to the achievement of sustainable development
 - be in general conformity with strategic policies in the development plan
 - be compatible with EU obligations.
10. The findings of the Examiner, as set out in their independent Examiner's Report, was received in September 2025. Where necessary the Examiner recommended modifications to the Plan in order that it meets the basic conditions and other legal requirements. The Examiner's Report can be found in Appendix 2.
11. The Examiner's Report also recommends that the Plan, once modified, should proceed to referendum on the basis that it has met all the relevant legal requirements.

12. NFDC, NPA and the Lymington and Pennington Town Council met in October 2025 to discuss the Examiner's proposed modifications and there was shared agreement that the Examiner's proposed modifications to the plan were appropriate.

Referendum and the making of the Neighbourhood Plan

13. Approval of the Neighbourhood Development Plan (with modifications) and the decision to proceed to referendum was made at Cabinet on 3 December 2025 and Council on 15 December 2025. The Council's Decision Statement can be found in Appendix 3.
14. The required notices regarding the date of the referendum and how people could vote were subsequently published on 19 December 2025.
15. The referendum took place on 29 January 2026 and officers can confirm that 92.5% of votes recorded answered 'YES' to the question: 'Do you want New Forest District Council and New Forest National Park Authority to use the Neighbourhood Plan for Lymington and Pennington to help it decide planning applications in the Neighbourhood Area?'. The turnout was 17.1%.
16. As the majority of those who voted (i.e. over 50%) are in favour of the draft Neighbourhood Plan, then the Plan should be 'made' (adopted) by both New Forest District Council (NFDC) and the New Forest National Park Authority (NPNPA) within 8 weeks of the referendum date.
17. The only circumstance where the district council should not make this decision is where the making of the plan would breach, or would otherwise be incompatible with, the fundamental rights and freedoms guaranteed under the European Convention on Human Rights and the UK Human Rights Act 1998, including equality implications. The Examiner considered this matter independently and found no evidence that the Plan breaches these human rights. The District Council concurs with that position.
18. Upon formal adoption the Neighbourhood Plan becomes legally part of the statutory Development Plan for the determination of planning applications.

Financial and resource implications

19. The district council can claim £20,000 towards the cost of supporting the preparation of the Neighbourhood Plan, arranging the Examination and carrying out the referendum from the Ministry of Housing Communities and Local Government (MHCLG) once the date for the referendum has been set.

20. Communities that have a 'made' Neighbourhood Plan and secure the consent of local people in a referendum, will benefit from a further 10% (rising from 15% to 25%) of the Community Infrastructure Levy revenues arising from qualifying development in their area.
21. Alongside this Neighbourhood Plan, a number of other town and parish councils are progressing neighbourhood plans. These plans place a statutory requirement on the council to engage with neighbourhood planning groups and also meet specific deadlines for facilitating consultations and, ultimately, referenda. An additional temporary resource to help facilitate this is in place.

Legal implications

22. Other than the legal considerations set out in the main body of this report, there are no further legal implications arising.

Risk assessment

23. Deciding not to proceed with a referendum would result in the community not having an opportunity to guide development in their areas and risk significant loss of confidence in the neighbourhood planning process.
24. There is a low risk of a legal challenge to a decision for a neighbourhood plan to proceed to referendum. However, the Examiner's reasoning is fully articulated in the report and their conclusions and recommendations are considered reasonable and logical. Officers do not see any justification for departing from the Examiner's recommendations.

Environmental / Climate and nature implications

25. The Neighbourhood Plan allows the community to influence local development and facilitates local distinctiveness and granularity to take account of the local environment.

Equalities implications

26. None directly from this report. However, the Lymington and Pennington Neighbourhood Plan has been developed through extensive community engagement and reflects a commitment to inclusivity and equality. The Plan responds directly to local concerns about housing affordability and accessibility, particularly the need for more first homes and smaller dwellings suitable for younger people and families, thereby addressing age and socio-economic disparities. It also promotes improved green infrastructure and active travel routes, enhancing access for people with mobility challenges and encouraging healthier lifestyles across all demographics.

Crime and disorder implications

27. None directly from this report. However, the Neighbourhood Plan supports the creation of safe, inclusive, and well-designed environments that help reduce opportunities for crime and anti-social behaviour.

Data protection / Information governance / ICT implications

28. Neighbourhood Plan engagement, including public consultation, requires the collection and processing of some personal information in a manner compliant with GDPR. Collection of data, and its use, is contained with the Planning Policy privacy notice. How data is collected and used will also be made clear to residents during the consultation.

New Forest National Park implications

29. Around one third of the Neighbourhood Plan area is within the National Park. There is a statutory requirement to further the purposes of the New Forest National Park, particularly where development pressures risk undermining landscape character, biodiversity, and opportunities for quiet enjoyment.
30. The Examiner has not identified any conflicts that could constrain the ability of the Neighbourhood Plan to align with the National Park Authority's objectives. The Neighbourhood Plan reiterates the range of adopted mitigation measures already in place, and these are deemed sufficient and/or compatible with the Park's special qualities.

Appendices:

Appendix 1: Lymington and Pennington Neighbourhood Plan
Appendix 2: Examiner Report
Appendix 3: NFDC Decision Statement

Background Papers:

None.

LYMINGTON AND PENNINGTON NEIGHBOURHOOD PLAN

2016 - 2036

Submission Plan

PUBLISHED BY

Lymington and Pennington Town Council under the
Neighbourhood Planning (General) Regulations 2012 (as
amended).

OCTOBER 2025

GUIDE TO READING THIS PLAN

Of necessity, this Neighbourhood Plan is a detailed technical document. The purpose of this page is to explain the structure and help you find your way around the plan.

1. INTRODUCTION & BACKGROUND

This section explains the background to this Neighbourhood Plan and how you can take part in and respond to the consultation.

2. THE NEIGHBOURHOOD AREA

This section details many of the features of the designated area.

3. PLANNING POLICY CONTEXT

This rather technical section relates this Plan to the National Planning Policy Framework and the planning policies of New Forest District Council (NFDC) and the New Forest National Park Authority (NFNPA).

4. COMMUNITY VIEWS ON PLANNING ISSUES

This section explains the community involvement that has taken place.

5. VISION, OBJECTIVES & LAND USE POLICIES

This key section firstly provides a statement on the Neighbourhood Plan Vision and Objectives. It then details Policies which are proposed to address the issues outlined in the Foreword and in Section 4. These Policies are listed in Table 1. There are Policy Maps at the back of the plan and additional information in the Appendices to which the policies cross reference.

6. IMPLEMENTATION AND MONITORING

This section explains how the Plan will be implemented and future development guided and managed. It suggests projects which might be supported by the Community Infrastructure Levy which the Town Council will have some influence over. Finally, it deals with a number of issues which although relevant are outside the scope of a Neighbourhood Plan.

FOREWORD

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APPENDIX A – LYMINGTON TOWN CENTRE VISION

APPENDIX B – POST OCCUPANCY EVALUATION GUIDANCE

APPENDIX C – LYMINGTON LOCAL DISTINCTIVENESS SPD

FOREWORD

This Neighbourhood Plan has been written to help shape the development priorities of the people of Lymington and Pennington. It has been a long time coming.

The Neighbourhood Plan process was started in 2015 when Lymington and Pennington was designated a Neighbourhood Plan Area by NFDC and NFNPA. A vision and action plan were created in March 2017 with working groups established to form an evidence base. An informal community consultation was held in July 2017.

NFDC adopted their Local Plan (Part One) in 2020 which included two sites in Pennington (SS5 and SS6). Unlike the Local Plan, this Neighbourhood Plan is concerned with small sites which can be developed rather than the larger, strategic allocations of NFDC.

I want to thank the previous Chair of the Neighbourhood Plan Steering Group, Councillor James Hoare, and all the Councillors, many of whom no longer sit on this Council, who have been involved in the Neighbourhood Plan process since 2015. Many members of the public also took part in the original working groups and I am very grateful to them for their input. Apart from a short stint on the Green Spaces working group in 2017, I did not come into this process until May 2023 when I took over as Chair of the Neighbourhood Plan Steering Group following the Local Elections.

The policies in this Neighbourhood Plan show Lymington and Pennington's desire to look to the future whilst respecting our past. Our focus has been on ensuring that the younger generation and local families are prioritised when it comes to housing, digital infrastructure is improved, and commercial space is protected and enhanced. Most of all, this is a Neighbourhood Plan that is ambitious for the future of Lymington and Pennington.

I hope that we have made the people of Lymington and Pennington proud.

Jack Davies

Chair of the Neighbourhood Plan Steering Group

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1. INTRODUCTION & BACKGROUND

1.1. Lymington and Pennington Town Council (LPTC) is preparing a Neighbourhood Plan for the area designated by the respective local planning authorities, NFDC and the New Forest NFNPA, in September 2015. The area coincides with the parish boundary (see Plan A on page 4). Pennington Common and the areas around the Lymington & Pennington Marshes fall within the New Forest National Park. The plan is being prepared in accordance with the Neighbourhood Planning (General) Regulations of 2012 (as amended).

1.2. The purpose of the Neighbourhood Plan is to set out a series of planning policies that will be used to determine planning applications in the area in the period to 2036. The Plan will form part of the development plan for the District, alongside the NFDC Plan part 1: Planning strategy (2020) and the saved policies from NFDC Local Plan Part 2: Development Management (2014), the NFDC Core Strategy (2009) and the NFDC Local Plan First Alteration (2005) and for those parts of the parish which fall within the National Park, alongside the NFNPA Local Plan (2019).

1.3. Neighbourhood Plans provide local communities with the chance to manage the quality of development of their areas. Once approved at a referendum, the Plan becomes part of the Local Planning Authority's statutory development plan and will carry significant weight in how planning applications are decided in the neighbourhood area. Plans must therefore contain only land use planning policies that can be used for this purpose. This often means that there are important issues of interest to the local community that cannot be addressed in a Plan if they are not directly related to planning. Although there is scope for the local community to decide on its planning policies, Neighbourhood Plans must meet all of the relevant basic conditions (see Figure 1 overleaf).

1.4. In addition, the Town Council will need to demonstrate to an independent examiner that it has successfully engaged with the local community and stakeholders in preparing the Plan. If the examiner is satisfied that it has, and considers the Plan meets the above conditions, then the Plan will go to a referendum of the local electorate. If a simple majority (over 50%) of the turnout votes in favour of the Plan, then it becomes adopted as formal planning policy for the district.

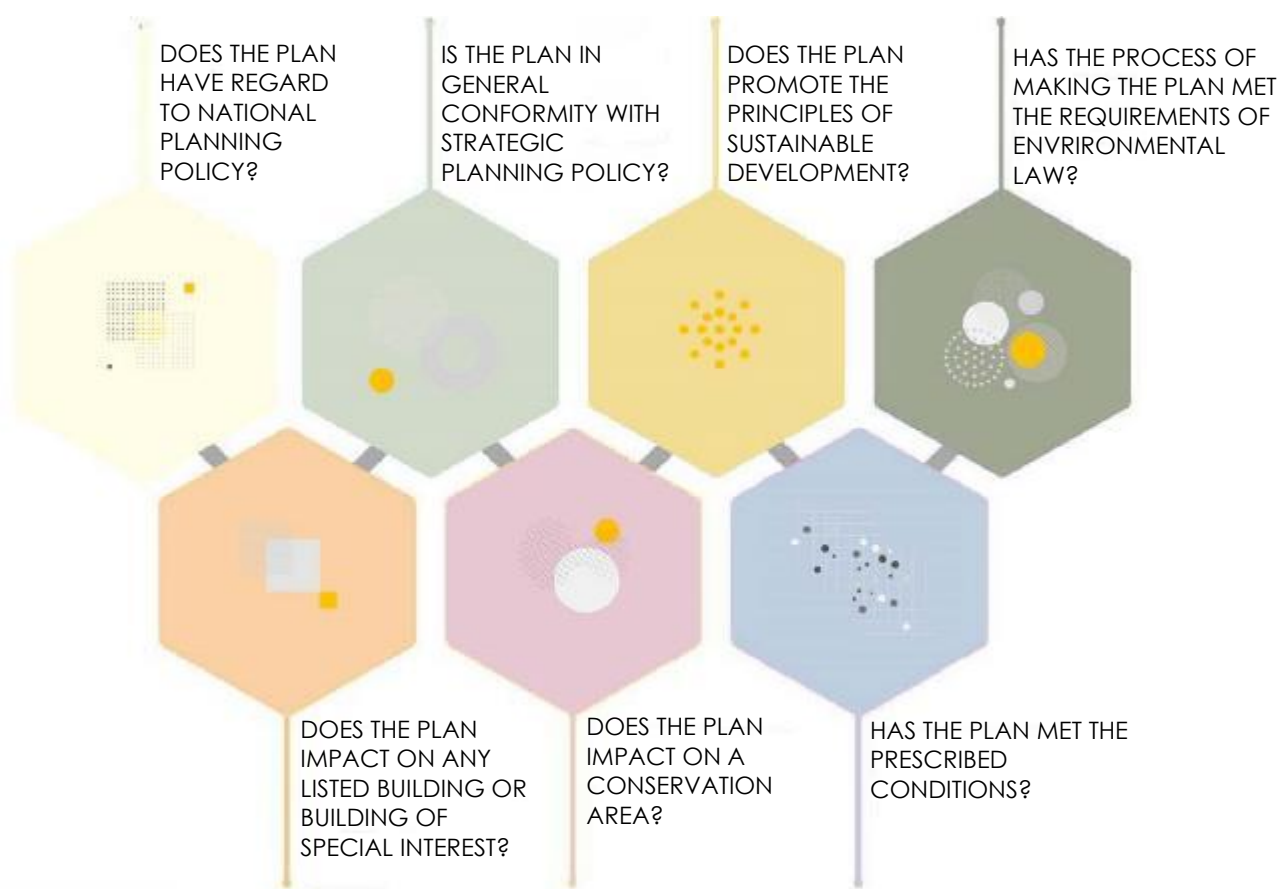


Figure 1: Basic Conditions

THE SUBMISSION PLAN

1.5. A draft ('Pre-Submission') Plan was published for consultation in August 2024 in line with the Regulations. The Parish Council has reviewed the comments received from the local community and other interested parties, including NFDC and NFNPA, and have made changes to this final version.

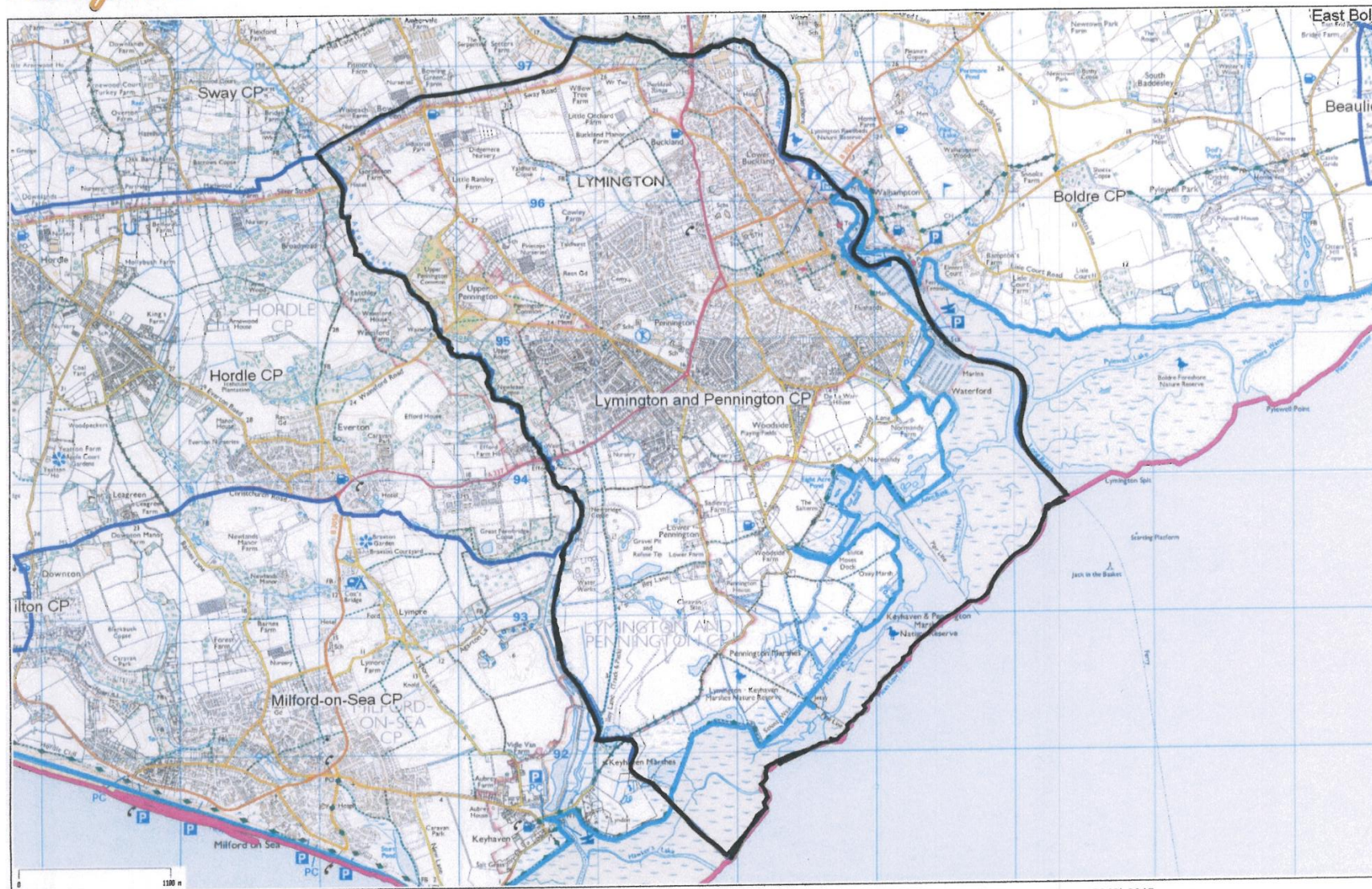
STRATEGIC ENVIRONMENTAL ASSESSMENT & THE HABITATS REGULATIONS

1.6. NFDC and NFNPA confirmed in a screening opinion of March 2017 that a Strategic Environmental Assessment (SEA) is required in accordance with the Environmental Assessment of Plans & Programmes Regulations 2004 (as amended). The SEA is published alongside this plan.

1.7. The screening opinion also confirmed that a Habitat Regulations Assessment is required in accordance with the Conservation of Habitats and Species Regulations 2010 (as amended). The HRA is published alongside this plan.

THE NEXT STEPS

1.8. This Plan will be submitted to NFDC and NFNPA for a further consultation and to arrange for its examination by an independent examiner and subsequent referendum, if the examiner is satisfied that the draft plan meets the basic conditions.



Date Created: 22-6-2015 | Map Centre (Easting/Northing): 431699 / 94198 | Scale: 1:35776 | © Crown copyright and database right. All rights reserved (100030848) 2015

Plan A: Designated Neighbourhood Area

2. THE NEIGHBOURHOOD AREA

2.1 Lymington is a small market and harbour town of considerable historic interest located on the south coast of the New Forest where the Lymington River flows into the Solent. It includes a number of villages and outlying hamlets which were formerly outside the main town such as Pennington.

2.2 Pennington sits on the river terrace plateau between Avon Water to the west and Yaldhurst stream to the east. The Solent forms Pennington's southern coastal border. The northern border is Sway Road. The hamlet of Bowling Green is in Upper Pennington on the border with Sway.

2.3 The earliest settlement in the Lymington area was around the Iron Age hill fort known today as Buckland Rings. The hill and ditches of the fort survive, and archaeological excavation of part of the walls was carried out in 1935. The fort has been dated to around the 6th century BC. There is another supposed Iron Age site at nearby Ampress Hole. However, evidence of later settlement there (as opposed to occupation) is sparse before Domesday book (1086).

2.4 Lymington itself began as an Anglo-Saxon village. The town is recorded in Domesday as "Lentune". About 1200, the lord of the manor, William de Redvers created the borough of New Lymington around the present quay and High Street, while Old Lymington comprised the rest of the parish. He gave the town its first charter and the right to hold a market.

2.5 Lymington was famous for salt-making from the Middle Ages up to the 19th century. There was an almost continuous belt of salt workings along the coast toward Hurst Spit.

2.6 Large In the 18th and early 19th centuries, Lymington possessed a military depot that included a number of foreign troops – mostly artillery but also several militia regiments. At the time of the Napoleonic Wars, the King's German Legion-Artillery was based near Portchester Castle and sent sick soldiers to Lymington or Eling Hospital. As well as Germans and Dutch, there were French émigrés and French regiments. They were raised to take part in the ill-fated Quiberon Invasion of France, from which few returned (contrast the Battle of Quiberon Bay, or Bataille des Cardinaux, a 1759 victory). From the early 19th century, Lymington had a thriving boatbuilding industry, particularly associated with Thomas Inman, builder of the schooner Alarm, which famously raced the American yacht America in 1851. The town is fortunate in that its historic structure and layout remain largely intact. Much of the town centre is Victorian and Georgian, with narrow cobbled streets in the area of the quay.

2.7 Pennington Village is the main historical settlement and is where major residential development throughout the twentieth century was concentrated. Most of Pennington's shops are located in the village along with a majority of Pennington's schools. Pennington Village also has a leisure centre, which has a 25-metre indoor swimming pool, a sports hall,

a gym, and an astro-turf football pitch. Pennington Common and Pennington Recreation Ground are open spaces used for sports and local community events.

2.8 Pennington and Oxy Marshes, historically the largest salt pans in the area, are popular spots for bird watching, walking, fishing, photography and cycling. Pennington Common and Upper Common are designated Sites of Special Scientific Interests ('SSSIs'). Pennington and Oxy Marshes are divided into 11 designated SSSIs.

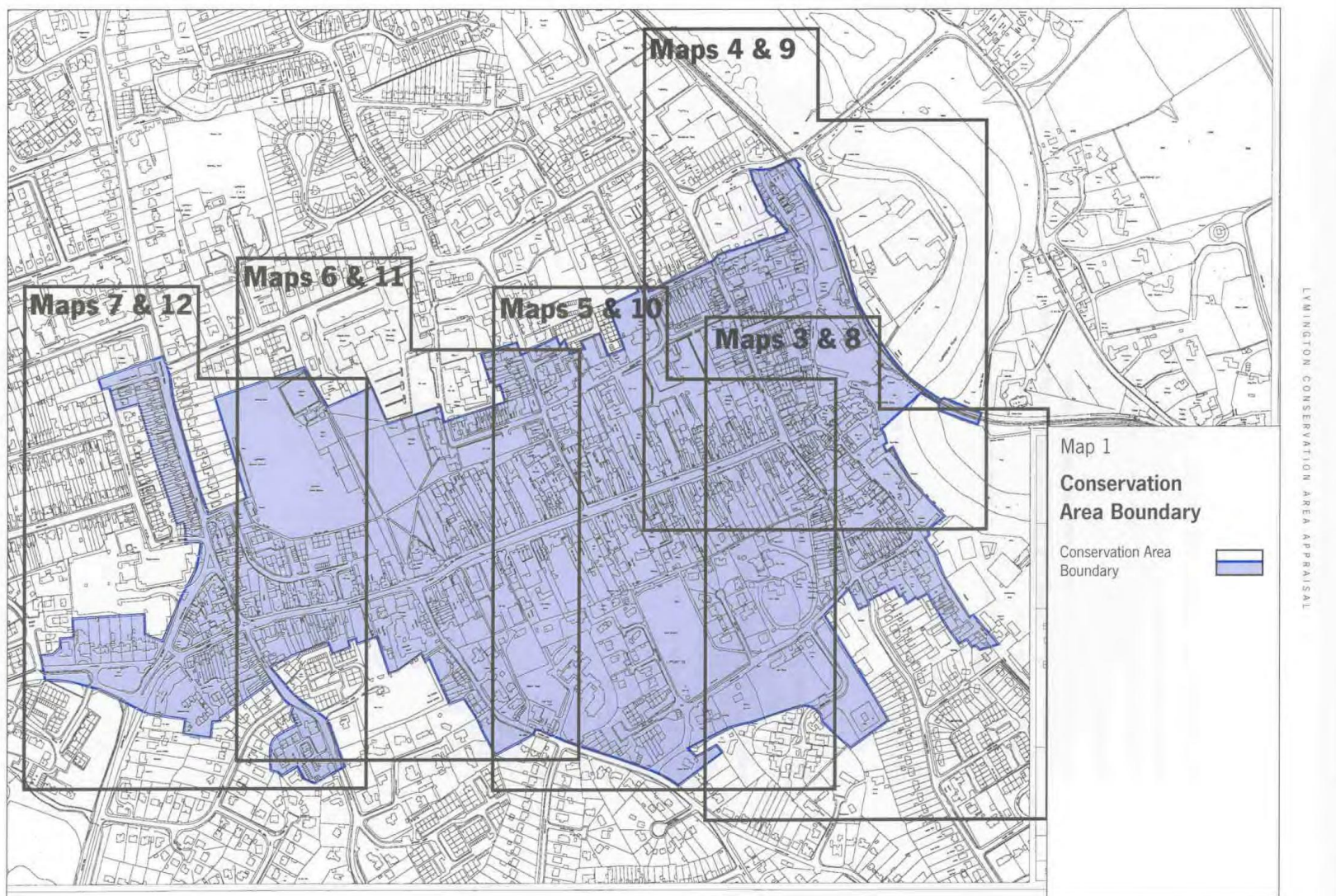
2.9 Lymington has remained largely unaffected by major development. The town has a high proportion of residential accommodation but does not suffer to the same degree the severe problems arising from empty off-season second homes often seen in coastal towns. Lymington retains a vibrancy, colour and richness that only a place where people actively live and work can have.

2.10 Lymington & Pennington retains a strong relationship with the surrounding landscape (the forest, river and proximity of the sea), permeating the fringes of the settlement and influencing much of the character further into the built-up area. Through this relationship to its surroundings and through clear social links the town is intrinsically part of the wider New Forest and Solent environment.

2.11 Lymington comprises the main body of the settlement and is structured around the High Street running east-west from the Lymington River, which is the historic, retail and community core. A number of residential areas wrap around the High Street, planned around a combination of road loops and cul-de-sacs that are typical of twentieth century residential layouts.

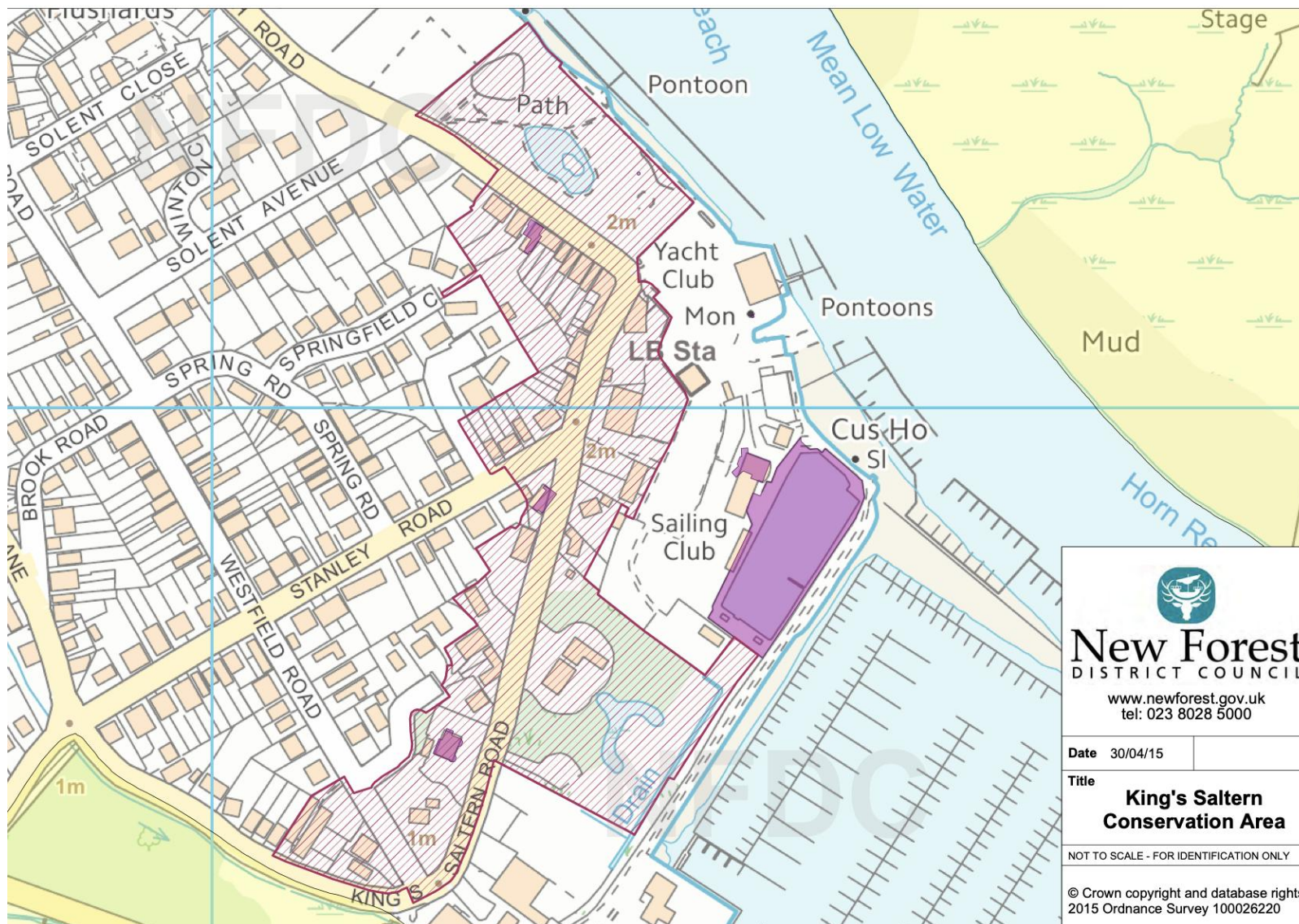
2.12 The A337 is the main road which runs through the New Forest from the M27/A31 into Lymington. This road runs down to a gyratory system at the western end of the High Street which effectively diverts through traffic to the west towards Bournemouth. There is a crossing to the east across the Lymington River on the B3054, but this is a relatively minor road. Consequently, Lymington does not suffer heavily from through traffic and the High Street retains an attractive pedestrian environment.

2.13 Pennington originally formed part of the Parish of Milford until 1839. In 1859, Pennington was constituted a separate ecclesiastical parish, it became own separate civil parish in 1911. In 1932, Pennington, together with Milford-on-Sea, Hordle and New Milton, formed part of the new enlarged borough of Lymington. Lymington Borough was abolished on 1 April 1974 under terms of the Local Gov. Act 1972, becoming an unparished area, in the district of the New Forest with charter trustees. It was then divided into 4 civil parishes. New Milton, Lymington & Pennington where upon Lymington & Pennington Town Council was formed. Since 1932 the population has risen from 1246 to over 6000.

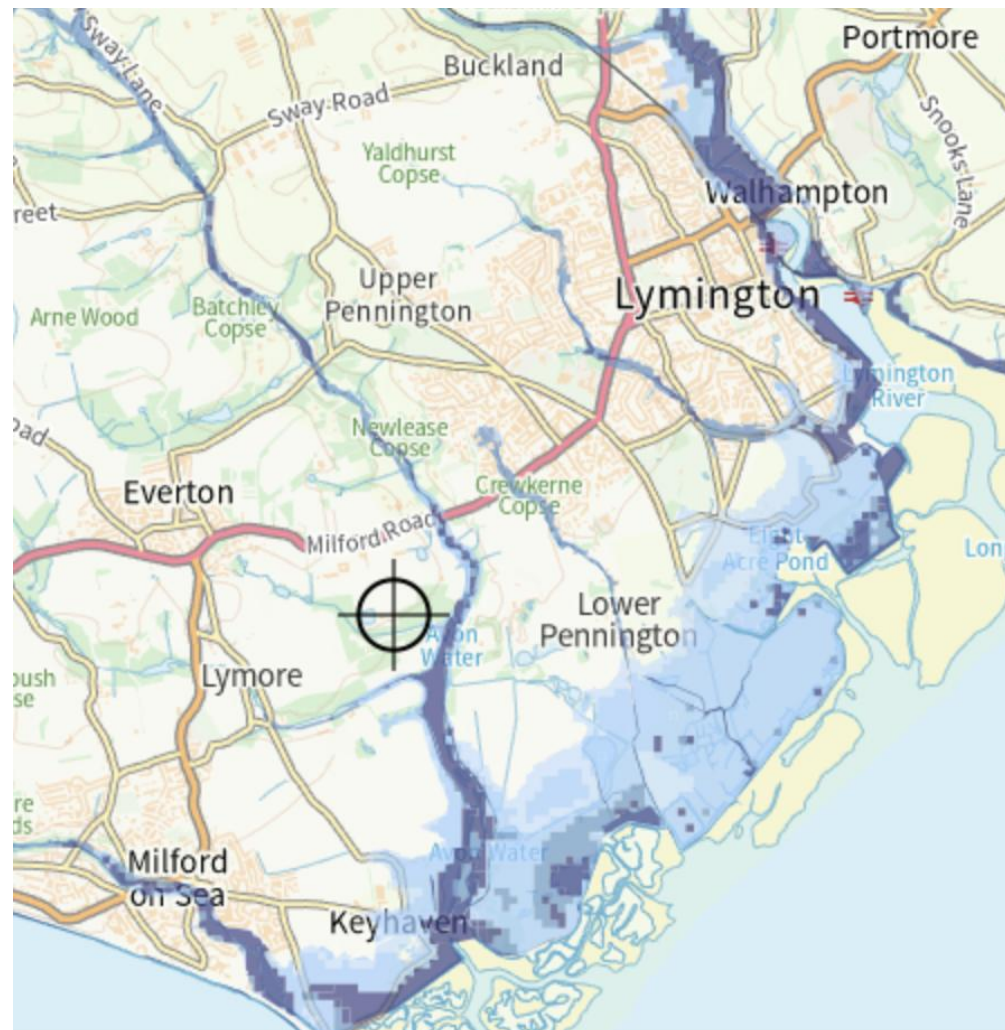


Plan B: Lymington Conservation Area (maps 3-11 can be viewed within the Lymington Conservation Area Appraisal <https://www.newforest.gov.uk/article/1236/Conservation-areas>)

8



Plan D: King's Saltern (Lymington) Conservation Area



Plan E: Flood risk from rivers or the sea in Lymington and Pennington

Extent of flooding from rivers or the sea

● [High](#)
● [Medium](#)
● [Low](#)
● [Very Low](#)
⊕ Location you selected

3. PLANNING POLICY CONTEXT

3.1 Lymington and Pennington lie within the NFDC and NFNPA planning authority areas in the county of Hampshire.

NATIONAL PLANNING POLICY

3.2 The National Planning Policy Framework (NPPF) published by the Government is important in the preparation of local plans and neighbourhood plans. The following paragraphs of the latest NPPF version published in 2023 are considered especially relevant:

- Neighbourhood planning – non-strategic policies (§28 - §30)
- Housing needs for different groups (§63)
- Ensuring the vitality of town centres (§90)
- Promoting health and safe communities (§96 - §97)
- Local Green Spaces (§105 - §107)
- Promoting sustainable transport (§110)
- Making effective use of land (§123 - §125)
- Achieving well-designed places (§131 - §137)
- Protecting Green Belt land (§152)
- Planning for climate change (§158)
- Conserving and enhancing the natural environment (§180)
- National Parks (§182 - §183)
- Conserving and enhancing the historic environment (§196)

3.3 A new iteration of the NPPF was published in December 2024. However, it sets out in §239 that neighbourhood plans submitted to the local planning authority under Regulation 15 before 12 March 2025 will be assessed under the previous framework (2023 NPPF).

3.4 The Government has also set out a requirement for the provision of First Homes in a Written Ministerial statement on 24 May 2021. These requirements were subsequently incorporated into National Planning Practice Guidance. As the Parish is 'washed over' by Green Belt (all of which is situated outside the settlement boundary), First Homes Exception Sites are unable to come forward in the Parish. It is anticipated that the forthcoming Local Plan will deal with this matter appropriately and NFDC has published an Interim Advice regarding First Homes in the meantime ([link](#)). NFNPA has granted planning permission for a limited number of First Homes on the adopted NFNPA Local Plan (2019) site allocations. However, First Homes are not supported on rural exception sites in National Parks in national policy.

3.5 The Levelling Up and Regeneration Act (LURA) received Royal Assent on 26 October 2023. The Act demonstrates a continued support of Neighbourhood Planning, and changes proposed is currently awaiting secondary legislation.

STRATEGIC PLANNING POLICY

3.6 The Neighbourhood Plan must be in general conformity with the strategic policies of the development plan for the New Forest. The development plan primarily comprises saved policies of the NFDC CORE STRATEGY (2009), THE NFDC LOCAL PLAN PART 2 (2014) and the NFDC LOCAL PLAN PART 1 (2020) for that part of the neighbourhood area which lies in the NFDC area, and the NFNPA LOCAL PLAN (2016 – 2036) for that part of the neighbourhood area which lies in the NFNPA area as well as separate minerals and waste plans for Hampshire.

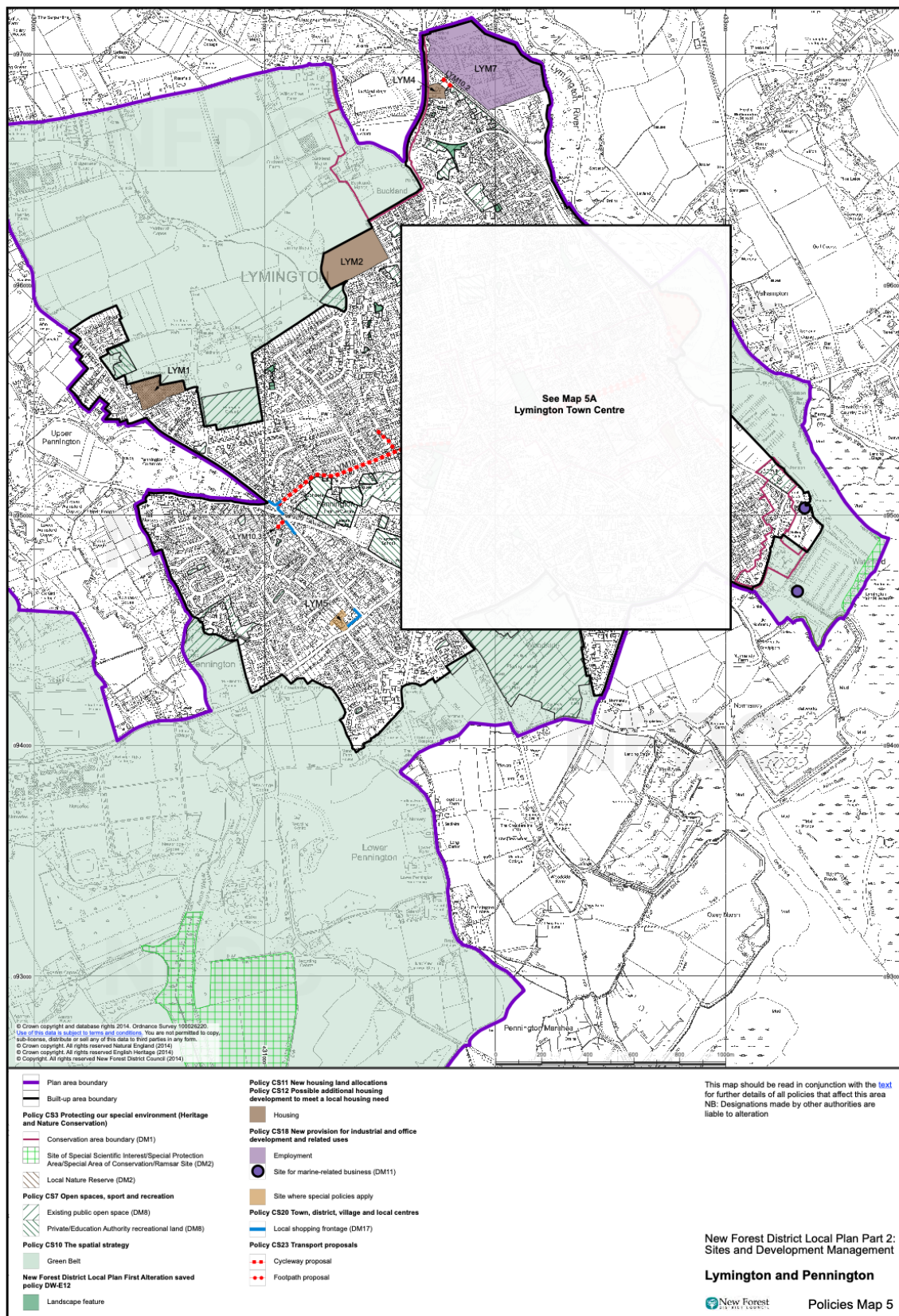
3.7 The following saved policies of the NFDC CORE STRATEGY (2009) are relevant to the Lymington and Pennington area:

- *Policy CS7 Open Spaces, sport and recreation* – securing a minimum standard of open space to serve the district including Lymington and Pennington through protecting existing and the provision of new open space.
- *Policy CS19 Tourism* – enhancing the visitor appeal of coastal environments and settlements including Lymington.
- *Policy CS21 Rural economy* – setting out a strategy for the rural economy applying to the rural part of the designated neighbourhood area that does not lie within the NFNPA area.

3.8 The following policies of the NFDC LOCAL PLAN PART 2 (2014) are relevant to the Lymington and Pennington area:

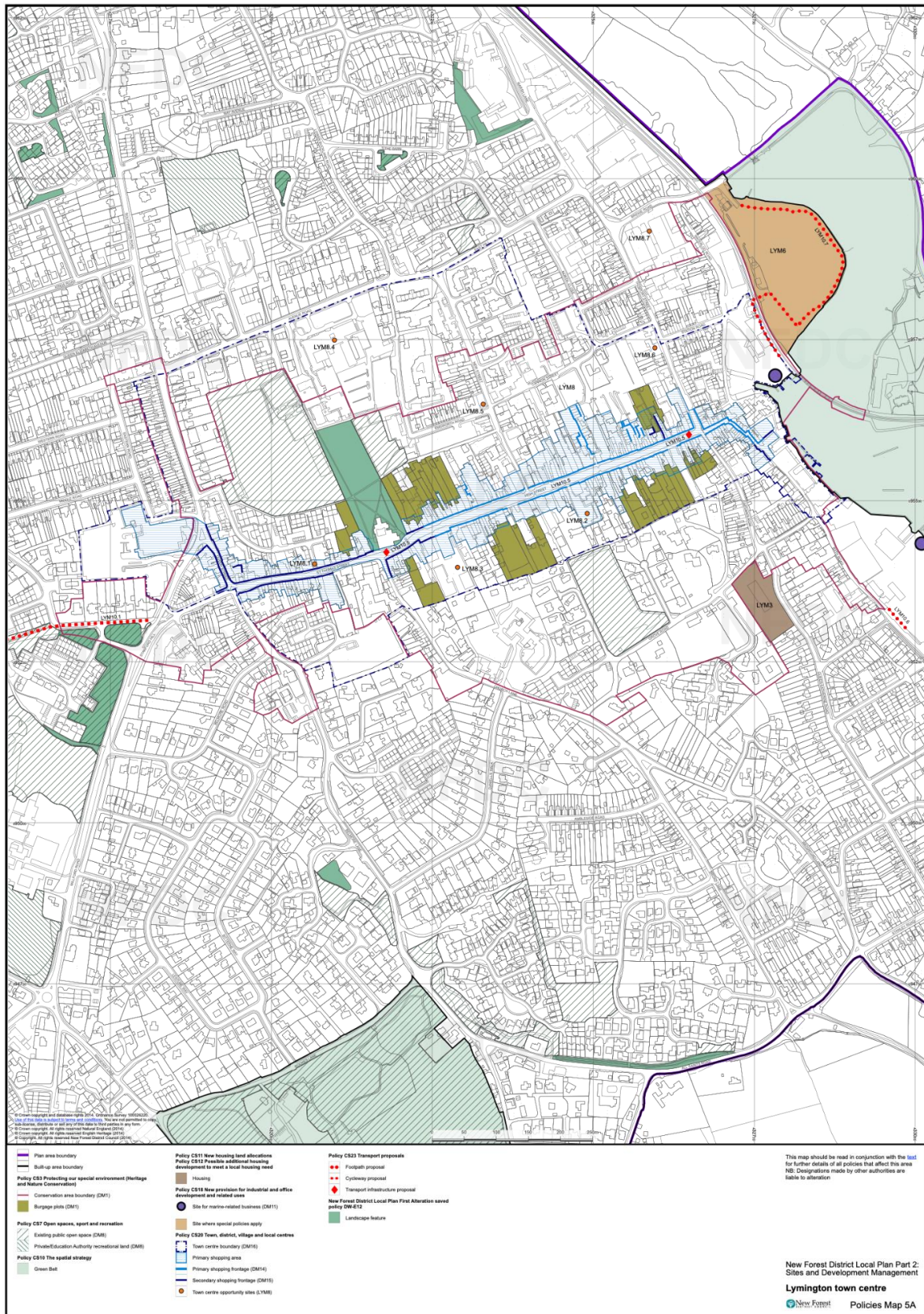
- *Policy DM1 Heritage and Conservation* – conserving and enhancing the historic environment, including listed buildings, Hillfort at Buckland Rings scheduled monument, the Buckland, Kings Saltern, and Lymington conservation areas, burgage plots (nos. 2-24; 45-51; 55-58; 63-75; 124-131 High Street and 43-48 St Thomas' Street) and other heritage assets in the designated neighbourhood area.
- *Policies DM2 Nature conservation, biodiversity and geodiversity and DM3 Mitigation of impacts on European nature conservation sites* – protecting the integrity of Solent and Southampton RAMSAR, The New Forest, Solent Maritime, and Solent and Isle of Wight Lagoons SACs, Solent and Southampton SPA and The New Forest, Lymington River, Lymington River Reedbeds, Hurst Castle and Lymington River Estuary SSSIs within the designated neighbourhood area as well as safeguarding habitats and species on several SINCs and the Lymington-Keyhaven Marshes LNR ensuring appropriate mitigation is secured.
- *Policy DM8 Protection of public open space, private recreation land and school playing fields* – including several such spaces in the designated neighbourhood area.

- *Policy DM9 Green Infrastructure linkages* – protecting and seeking improve connections between green infrastructure assets including those in the designated neighbourhood area.
- *Policies DM11 Sites for marine-related businesses and access to the water and DM12 Maintaining access to the water* – identifying Lymington Marina, Bath Road; Bath Road, Lymington, yacht clubs, harbour offices, car and boat parks; Boat Yard, Mill Lane; and Lymington Yacht Haven, Kings Saltern Road as sites particularly suited for marine-related business and requiring continued access to the water in these locations.
- *Policy DM13 Tourism and visitor facilities* – supporting new serviced visitor accommodation in defined built-up areas and re-use of existing tourist accommodation buildings where no longer viable.
- *Policies DM16 and DM19 on town centres and small shops* – providing a starting point for considering main town centre uses and small shop proposals.
- *Policies DM20 – DM25 on Countryside policies* – setting out the approach to development applying to the rural part of the designated neighbourhood area that does not lie within the NFNPA area.
- *Policy DM26 Development generating significant freight movements* – requiring proposals to be located close to the main road network.
- *Site-specific Policies LYM4* allocating a site in Lymington for residential-led development, all of which has now been completed.
- *Site-specific Policy LYM5* allocating Fox Pond Dairy Depot and Garage, Milford Road, Pennington for mixed use development which has not yet come forward.
- *Site-specific Policy LYM7* designating Ampress Park, Southampton Road for employment uses.
- *Site-specific Policy LYM 8* identifying seven 'Town Centre Opportunity Sites' for main town centre uses.
- *Policy LYM9 Burgage Plots* – preventing development which would harm this important historic feature of Lymington town centre.
- *Policy LYM10.5 & 10.7 Transport Schemes* – identifying specific transport schemes aimed at promoting the use of sustainable travel.



Plan F: NFDC Local Plan Part 2 Policies Map - Lymington and Pennington extract ([link](#))

The most up to date mapping can be viewed online ([link](#))



Plan G: NFDC Local Plan Part 2 Policies Map - Lymington Town Centre extract ([link](#))

The most up to date mapping can be viewed online ([link](#))

3.9 The following policies of the NFDC LOCAL PLAN PART 1 (2020) are relevant to the Lymington and Pennington area:

- o *Policies STR1 – STR3 on spatial strategy* – directing development to the most accessible locations within the district and protecting the countryside, and the adjoining National Park setting.
- o *Policy STR4 Settlement hierarchy* – setting out the nature and scale of development with Lymington classified as a 'town' and one of the most sustainable locations for growth.
- o *Policy STR5 Meeting our housing needs* – identifying at least 6,000 homes on Strategic Site Allocations including 285 new homes in Lymington and Pennington at:
 - *SS5 Land at Milford Road, Lymington* for 185 new homes and public open space;
 - *SS6 Land to the east of Lower Pennington Lane, Lymington* for 100 new homes and public open space;and 200 homes on additional sites to be identified in Lymington and Pennington.
- o *Policy STR6 Sustainable economic growth* – carrying forward the employment allocation of Local Plan Part 2 Policy LYM7.
- o *Policy STR7 Strategic transport priorities* – supporting and encouraging proposals resulting in improvements to accessibility of sustainable travel.
- o *Policy STR8 Community services, infrastructure and facilities* – protecting existing and ensuring adequate provision of new infrastructure.
- o *Policy STR9* carrying forward provisions of the Minerals and Waste Local Plans as much of the designated neighbourhood area falls within either a Minerals Safeguarding Area or Minerals Consultation Area (see below).
- o *Policies ENV1 – ENV4* on protecting the special environment of the district including the designated neighbourhood area.
- o *Policies HOU1 – HOU5* on the type, size and mix of new housing in the district including the designated neighbourhood area.
- o *Policies ECON1 – ECON2; ECON5 – ECON6* on protecting and improving business and the economy needs in the district including the designated neighbourhood area. Specifically, updating the designations of Local Plan Part 2 Policies DM14 – DM19 as well as identifying a 'Primary Shopping Area' in the town centre of Lymington.
- o *Policies CCC1 – CCC2* on community safety and climate change for the district including the designated neighbourhood area.
- o *Policies IMPL1 – IMPL3* on the implementation and monitoring of the plan and new developments.

There is only an interactive version of the NFDC LOCAL PLAN PART 1 (2020) Policies Map available which can be seen by visiting the NFDC website ([link](#)).

3.10 NFDC are proceeding with a full Local Plan (LP) Review but is currently in the very early stages. Conscious that Planning Practice Guidance (ID:41-043-20140306) requires the Qualifying Body and NFDC/NFNPA to work constructively together to avoid duplicating

planning processes, the NP Steering Group agreed to address any additional housing delivery and allocations under a future Neighbourhood Plan review or participation in the LP review as the process progresses.

3.11 The [NFNPA LOCAL PLAN \(2016 - 2036\)](#) recognises that Lymington is one of the main towns adjacent to the National Park which is an important local employment centre and provide services to meet most of the needs of the National Park, including providing access to its two train stations, link with the Isle of Wight ferry, and buses to Southampton via Lyndhurst and Brockenhurst (Policy SP4: Spatial strategy). There are a number of development management policies which cover the rural area of Lymington and Pennington in the National Park including that of Policy DP12 on flood risk which draws attention to the risks of coastal flooding but also that of other water bodies e.g. the Lymington River and Policy SP55 on Access which supports community transport initiatives including the Lymington to Brockenhurst Community Rail Partnership. Other relevant policies of the NFNPA Local Plan are detailed in the Basic Conditions Statement published alongside the Neighbourhood Plan. There is only an interactive version of the [NFNPA LOCAL PLAN \(2016 - 2036\) Policies Map](#) available which can be seen by visiting the NFNPA website ([link](#)).

3.12 The [HAMPSHIRE MINERALS AND WASTE PLAN \(2013\)](#) identifies minerals and waste infrastructure safeguarded within the Plan area, including Manor Farm, Lymington and the Lymington Waste Transfer Station as per Policy 16 and 26 respectively. Much of the designated neighbourhood area falls within a Minerals Safeguarding Area for sand and gravel which is safeguarded against needless sterilisation by non-minerals development, unless 'prior extraction' takes place as per Policy 15. There is only an interactive version of the [HAMPSHIRE MINERALS AND WASTE PLAN \(2013\) Policies Map](#) available which can be seen by visiting the Hampshire County Council website ([link](#)). A partial update of the Hampshire Minerals and Waste Plan as been submitted to the Secretary of State and will shortly be subject to an Examination.

3.13 The Hampshire Local Transport Plan LTP4 ([link](#)), adopted in February 2024, includes a number of policies that are relevant to this Neighbourhood Plan. Of particular relevance are the following:

- Policy HP1 – Deliver the infrastructure required to support a large-scale shift towards walking and cycling for everyday trips
- Policy HP2 – Enable healthy neighbourhoods and high streets in partnership with communities
- Policy BTD1 – Regulating traffic, parking, and kerbside deliveries
- Policy RT1 – Maintaining accessibility in rural areas, and providing viable alternatives to the private car
- Policy RT2 – Sustainable access to the countryside
- Policy DM1 - Integrate transport and strategic land use planning to reduce car dependency

- Policy DM2 - Support proactive masterplanning of new development sites for high quality neighbourhoods

NEIGHBOURHOOD PLANNING POLICY

3.14 There are no made neighbourhood plans in the vicinity.

CONSERVATION AREAS

3.15 There are three Conservation Areas in the Town;

- Lymington Conservation Area was designated in July 1977 and the boundary has since been amended a number of times, most recently in 1999. See Plan B on page 8.
- Buckland (Lymington) Conservation Area was designated in December 1999. See Plan C on page 9.
- King's Saltern (Lymington) Conservation Area was designated in April 2001. See Plan D on page 10.

Conservation Areas were introduced by the Civic Amenities Act of 1967, to protect areas of special interest as opposed to individual buildings. Since 1967 some 8,000 conservation areas have been designated in England. Under the Planning (Listed Buildings and Conservation Areas) Act 1990 local authorities have a duty to designate conservation areas and from time to time to review the boundaries. Such areas are defined as 'areas of special architectural or historic interest, the character or appearance of which it is desirable to preserve or enhance'.

3.16 The main attributes that define the special character of an area are its physical appearance and history, i.e. the form and features of buildings and the spaces between them, their former uses and historical development. Where there are a number of periods of historical development, the character of individual parts of the conservation area may differ. Contrasts between the appearance of areas and the combination of buildings of various ages, materials and styles may contribute to its special character.

4. COMMUNITY VIEWS ON PLANNING ISSUES

4.1 The Lymington and Pennington Neighbourhood Plan has a Steering Group consisting of seven Town Councillors.

4.2 Initially six working groups were created, comprising of Town Councillors, representatives of local community groups, residents and local businesspeople. These groups discussed various planning and infrastructure issues including:

- Green Infrastructure
- Design and Heritage
- Strategic Site
- Business, Tourism and Employment
- Social Infrastructure
- Transport and Roads
- In 2021 a Town Centre Working group was added.

4.3 In 2017 and 2023 informal consultations were held with the local Community. Both consultations comprised of a drop in exhibitions, with Steering Group members and Council Officers available to answer questions. The events were held in St Marks Church Hall, Pennington and Town Hall, Lymington. The 2017 exhibitions attracted over 1300 residents between them and over 800 people visited both the exhibitions in 2023. Local interest groups were also invited to a question/answer meeting in 2023 with the Steering Group.

4.4 Both informal consultations included surveys asking the Community their views on planning issues, with the latter focusing on policies to be included in the plan. 586 responses were received in 2017 and 93 in 2023. The 2017 consultations included the strategic sites, which is the likely reason for a greater response.

4.5 Throughout the Plan period the consistent response from the community has been on the need for more first homes/smaller homes for younger people and less retirement properties being built in Lymington. There has also been a strong demand for improved green infrastructure links, encouraging pedestrians and cyclists and connecting open spaces. Other areas raised include:

- Improved telecommunications
- Raise design standards
- Development on brownfield sites only
- Energy efficient housing
- Improvements to Lymington High Street and Pennington Village.

4.6 A full account of consultation will be included in the Consultation Statement which will be published alongside the submission version of the Plan document in due course.

VISION

- “A flourishing town with a younger, economically active population;
- A thriving town centre utilising its heritage, marine and tourism appeal to differentiate itself from other towns in the forest;
- A green town well connected to the surrounding coast, countryside and National Park;
- A self-contained town able to meet all its community health, education and recreational needs;
- A delightful town of distinct local areas, streets and rural lanes successfully blending the old with the new;
- A sustainable town that contains its impacts on the high-quality biodiversity and green belt that surround it”.

OBJECTIVES



5.1 The purpose of these policies is both to encourage planning applications for proposals that the local community would like to support, and to discourage applications for development that the community does not consider represent sustainable development in the Parish.

5.2 The planning framework for the Parish will continue to rely on national and local policies in addition to the policies introduced under the Neighbourhood Plan. Set out below are the proposed land use policies. Each policy is numbered and titled. Where necessary, the area to which it will apply is shown on the Policies Map attached to the document. After each policy is some supporting text that explains the purpose of the policy, how it will be applied and, where helpful, how it relates to other development plan policies.

POLICY LP1: A SPATIAL STRATEGY FOR THE TOWN

A. The focus for new development in Lymington and Pennington, outside of the National Park will be on reusing brownfield land and on realising other suitable development opportunities within the settlement boundary, as shown on the Policies Map. The principles of 'brownfield first' and of 'gentle densification' in the town will deliver a supply of developable land over the Plan period that will reduce the need for land to be further released from the Green Belt for development that will avoid significantly eroding the special historic and architectural interest of the Lymington Conservation Area.

B. The focus on using brownfield land and for gentle densification will contribute to bolstering and sustaining the Lymington town centre's vitality and viability as the primary centre for retail and other town centre uses. The local centres at Pennington will continue to help meet the day-to-day needs of the local community in line with '20-minute neighbourhood' principles. Outside the town and local centres, the residential character of the suburban areas of Lymington and Pennington will be sustained and enhanced through sensitively designed high quality infill and plot redevelopment.

C. Beyond the settlement boundary the focus will be on enhancing the natural environment, contributing to nature recovery, protecting and enhancing the National Park landscape and maintaining the essential characteristics of openness and permanence of the Green Belt in accordance with national policies, avoiding inappropriate development, unless material considerations indicate otherwise.

5.3 This policy establishes a coherent spatial plan for the town and its surrounding countryside that shows how its key component parts – Lymington town centre, Pennington

local centres, the suburban areas and undeveloped countryside areas – will work together to bolster this sustainable community. It accords with the broader spatial strategy objectives of the NFDC and NFNPA Local Plans and does not attempt to revise the way in which development plan policies apply to the area, it simply refines the distinct spatial components of the area in more detail whilst taking into account that other material considerations, such as the latest version of the NPPF, will continue to apply.

5.4 Critical to the success of the town will be maintaining its identity as a distinct, self-contained settlement nestled within the Green Belt. The urban fabric of the town offers opportunities for gentle densification, especially in and around the town centre area and at the local centres in Pennington serving the surrounding residential areas, but also to reuse previously developed ('brownfield') land. Gentle densification can be defined as increasing the density of a proposed housing development to meet housing needs, whilst guarding against detracting from the character of the particular area which includes the special historic and architectural interest of the Lymington Conservation Area as set out in the Lymington Conservation Area Appraisal and other design guidance. There will also be a need for appropriate levels of car and cycle parking provision for new developments.

5.5 The policy requires proper attention to be given to prioritising and realising such opportunities as they arise, rather than utilize the Green Belt. Not only is this approach more efficient in using a scarce land resource, but it will avoid creating unsustainable patterns of growth, poorly located from established infrastructure and therefore car dependent.

POLICY LP2: LYMINGTON TOWN CENTRE

- A. The Neighbourhood Plan defines a Spatial Framework for Lymington Town Centre, as shown on Plan H, for the purpose of delivering the objectives of the Lymington Town Centre Vision, as set out in Appendix A.**
- B. Proposals for redevelopment within and adjacent to the key elements of the Spatial Framework will be supported provided they demonstrate how they will contribute to the Lymington Town Centre Vision.**
- C. As appropriate to their scale, nature and location, development proposals will be required to make a direct and proportionate contribution to projects and town centre improvements which deliver the objectives of the Lymington Town Centre Vision, provided the contributions make the proposals acceptable in planning terms and are directly related to the development**

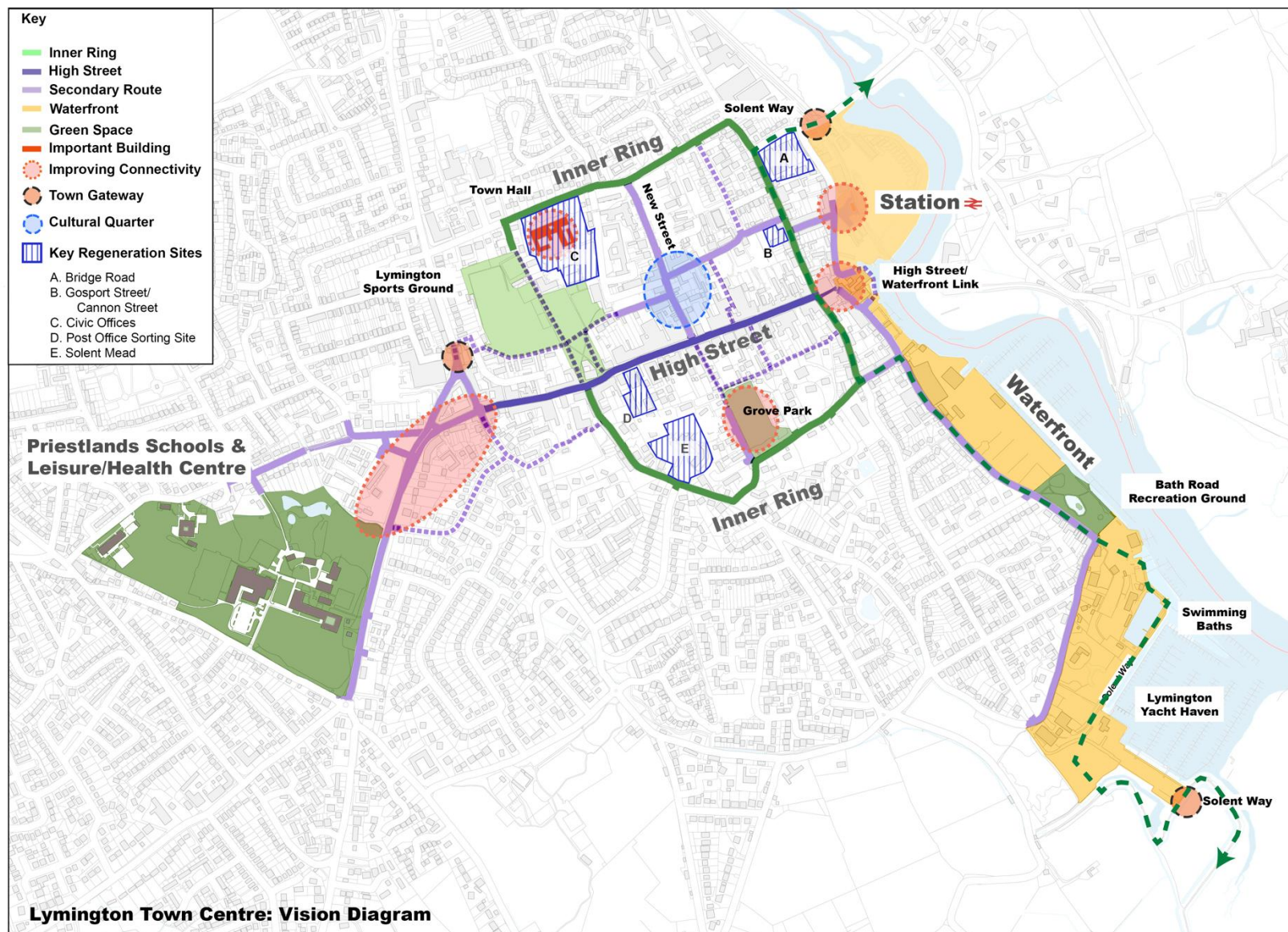
5.6 Lymington Town Centre has retained its attraction as a vibrant destination that draws in many visitors and tourists throughout the year, however it cannot become complacent in considering changing economic and consumer trends, including other longer-term challenges such as the climate crisis. It has therefore been important to consider how Lymington Town Centre can continue to provide a balanced mix of social, public and economic activities. It must take a 'Place First' approach that reflects the needs of its users, its specific characteristics, strengths, culture and heritage. This approach is in line with the Grimsey Review 2 (July 2018) [\(link\)](#) conclusions which highlight the need to reshape centres into community hubs which incorporate health, housing, arts, education, entertainment, business/office space, as well as some shops, while developing a unique selling proposition.

5.7 The policy therefore defines a Spatial Framework for Lymington Town Centre which incorporates not only the essential commercial, business and service uses within the village centre but also existing and new open space provisions. The key elements of the Spatial Framework are shown in Plan H below and are set out in more detail in the attached Appendix A.

5.8 The Town Centre functions encompasses residential, commercial, business and service, local community and leisure uses. The existing open spaces and other amenities and their connection and close proximity to the commercial, business and service uses serves a much wider purpose than simply offering access to a wide range of employment, services and facilities. The area functions as an important meeting place for local people which meets health, recreational and day-to-day business, commercial and service needs with new development anticipated to contribute to this wider purpose.

5.9 The policy therefore seeks to retain the wider functions of the Town Centre and make provisions for redevelopments to enhance these functions through improving accessibility and the safety and enjoyment of the active travel environment, the public realm and the green environment. This will be achieved through managing the design features for all new development proposals within the Spatial Framework of the Lymington Town Centre.

5.10 Finally, the policy seeks to refine NFDC Local Plan Part One Policy IMPL1 by ensuring that allocated funds are directed to projects and town centre improvements identified in Appendix A to deliver the objectives of the Lymington Town Centre Vision. The mix of town centre uses will continue to be managed by existing development plan policies until such a time that they are replaced, either through other policies in this Neighbourhood Plan, its review, or an emerging Local Plan.



Plan H: Lymington Town Centre Spatial Framework

POLICY LP3: KEY REGENERATION OPPORTUNITIES IN THE TOWN CENTRE

A. Proposals for redevelopment of the following key regeneration sites, as shown on the Policies Map, are encouraged provided they demonstrate how they contribute to the Lymington Town Centre Vision and accord with other relevant development plan policies:

- a. Bridge Road**
- b. Gosport/Cannon Street**
- c. Town Hall, Avenue Road**
- d. Post Office and BT Site**
- e. Solent Mead**

For the avoidance of doubt, strategic policy requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD in New Forest District, the revised New Forest Habitat Mitigation Scheme SPD in the National Park area, NFDC air quality monitoring and nutrient neutrality will continue to apply.

5.11 The policy seeks to encourage the redevelopment of a number of key regeneration sites within the town centre. Collectively these opportunity areas have the potential capacity to deliver new homes in a sustainable location to contribute to the housing requirement of around 200 set out in Policy STR5 of the NFDC Local Plan Part 1. All of the sites have been identified in the NFDC Strategic Housing Land Availability Assessment: Appendix 5 Lymington dated June 2018 with the exception of Bridge Road and Solent Mead. The Bridge Road site was the only additional site that was made available through previous Neighbourhood Plan consultations. The Solent Mead site is in split ownership between Hampshire County Council (HCC) and NFDC. A decision was made by HCC in 2025 to close its part of the site and it is therefore likely that that part of the site will become available for development during the Plan period. The NFDC housing on the site will remain.

5.12 The residential element of proposals is encouraged to deliver housing types and tenures that are more suited to younger households than older households, although downsizing opportunities will also be supported as part of a balanced mix of homes. As further set out in Policy LP7, the aim of securing a mixed and balanced community

demographic is key in the town and will significantly improve the ability to sustain a vibrant town centre. In addition to residential development, these sites can also provide for other non-residential uses; including retail, employment and hotel uses and there may therefore not be a need to relocate some of the employment uses. All of the sites fall within the town centre boundary and offers an opportunity to contribute to the Town Centre Vision.

5.13 All of the sites lie either adjacent or close to the Inner Ring proposed as part of the Town Centre Vision providing an opportunity to influence the design and layout of schemes to contribute to its delivery. The Bridge Road site (a.) provides an opportunity to respond to its location at one of the town's gateways and the redevelopment of the Civic Offices (c.) provides an opportunity to create a more mixed use and lively environment. Further details are set out in Appendix A. The Town Council will continue to lobby all landowners to maximise the provision of affordable housing for social rent on all of these sites.

5.14 The Neighbourhood Plan acknowledges that redevelopment of brownfield land may have higher development costs and it may therefore be necessary to change some of the policy levers to fully realise the redevelopment potential of these sites. The Town Council therefore encourages future developers to engage directly with it and the local community, alongside wider stakeholders, to discuss and agree options for enabling the delivery of viable schemes supported by the local community.

POLICY LP4: PENNINGTON SHOPPING PARADES

A. The Neighbourhood Plan defines Local Shopping Frontages at Milford Road and South Street, and Pennington Square and South Street, as shown on the Policies Map. Proposals for a change of use that will result in the loss of a use that meets the day-to-day needs of the local community on ground floor frontages in a Local Shopping Frontage will not be supported.

5.15 This policy is intended to protect the essential local shopping and service facilities at Milford Road and South Street, and Pennington Square and South Street replacing the provisions of NFDC Local Plan Part One Policy ECON6. Both parades play a vital role in providing the local communities with convenience and local services that reduce their dependence on travelling further afield. It is necessary to update this policy provision following the implementation of the new Use Class Order which consolidated a number of uses into a new Class E (commercial, business and service) uses and the impact from shops changing into residential uses in these locations. The figures below demonstrate the extent of existing uses and the shopping frontages defined on the Policies Map reflect this updated evidence base. It has not been necessary to amend the extent of the parades as defined in the NFDC Local Plan Part One Policy ECON6. This approach aims to ensure that residents can access day to day services and amenities, for example, convenience shops, education and healthcare facilities.

5.16 It is recognised that some changes of use do not now require planning permission and new permitted development rights has enabled changes of use from what are now Class E uses to residential uses. The Town Council will monitor the loss of such uses to residential uses in partnership with NFDC. Should monitoring indicate that such uses are being lost to residential uses at a rate that harms the ability of the local communities' day-to-day needs being met the Town Council will discuss the opportunity of NFDC initiating an Article 4 Direction application with the Secretary of State. An Article 4 Direction can remove permitted development rights, enabling such changes to remain in planning control.

Fox Pond Shopping Parade



Class C3 (residential use)



Class E (commercial, business and service use)

Pennington Square Shopping Parade



Class C3 (residential use)



Class E (commercial, business and service use)



POLICY LP5: WALKABLE NEIGHBOURHOODS

- A. The Neighbourhood Plan identifies broad locations at Buckland, Woodside, Lower Pennington and Upper Pennington, as shown on the Policies Map, as walkable communities that are primarily residential areas lying more than 800m walk from the defined Lymington Town Centre.**
- B. In each broad location, proposals comprising uses to meet the local communities day-to-day needs will be supported in principle.**
- C. Proposals including uses which are intended to meet the local communities' day to day needs may be delivered as ground floor units in a scheme with housing on upper floors if designed to manage any potential for conflicts in amenity between those uses.**
- D. Proposals must demonstrate how schemes are considered to strengthen the mix and balance of uses which provide for the day-to-day needs of local people. Within this context, clustering of uses intended to meet day-to-day community needs in each broad location is preferred.**
- E. Proposals including uses which are intended to meet the local communities' day-to-day needs must demonstrate that the site is located and accessible by walking, cycling and/or public transport from established residential areas in a walkable community area in safe, convenient and pleasant ways.**
- F. Proposals to change the use of land or premises in a walkable community from a use which contributes to meeting the local communities' day-to-day needs to another use will not be supported.**

5.17 The policy is inspired by the 20-minute neighbourhood concept which seeks to ensure that there is good access to a range of services and facilities within a 10 minute walk (800m) of home. Interest in the idea has grown as the COVID-19 pandemic lockdowns put a spotlight on the importance of the liveability of neighbourhoods, perhaps working at home if possible, using public green space, cycling and walking instead of using cars and connecting with neighbours. There is generally a good coverage of services and facilities across Lymington and Pennington and the policy therefore identifies broad locations within the town's suburban areas to protect established every day/convenience Class E – such as the Local Shopping Frontages defined in Policy LP4 above – and community uses spread across the town from loss to other uses and to support the provision of new uses. Uses which are considered to meet day-to-day needs include Class E(a) convenience food retail for up to a total of 500 sq.m of net internal retail floorspace, Class E(b) café, Class E(d) indoor sport and recreation, Class E(e) medical services, Class E(f) day centre or nursery, Class F1

learning and non-residential institution; and/or a Class F2 local community use of an appropriate scale. To clarify the policy does not promote a critical mass of commercial developments or main town centre uses in these broad locations but seeks to meet the day-to-day needs of local people.

5.18 Hampshire County Council and NFDC conducted a consultation on the draft Local Cycling and Walking Infrastructure Plan (LCWIP) ([link](#)) in September-November 2024 and anticipates adopting this in Summer 2025.

POLICY LP6: HIGH QUALITY DESIGN

- A. All development should achieve high quality design that contributes positively to local distinctiveness, quality of life and enhances the character and identity of the locality. To achieve this development proposals are required to have full regard to the Lymington Local Distinctiveness SPD, attached as Appendix C, as relevant to their location, scale and nature.**
- B. In addition, development proposals should:**
 - I. Use a combination of design responses to create places that have a clear identity, are easy to navigate, and are in keeping with the character and appearance of the area. These can include landmark buildings, distinct building features, distinct landscaping and mature trees, signage at key nodes and arrival points, variations in alignment and small setbacks of buildings where appropriate; and**
 - II. Use a combination of environmental design responses to provide benefits for people, wildlife and the environment including creating habitats for wildlife, street planting, and new woodlands with careful consideration of the location, species and spacing. The loss of existing healthy specimen hedgerows and green features to accommodate development or provide access should be minimised. Landscaping and layout schemes will be expected to demonstrate how development has incorporated existing healthy specimen hedgerows and green features. Where removal is necessary replacements should be of an appropriate size and species; and**
 - III. Minimise the impact of vehicle parking on the street scene. Where parking is at the front of buildings it should be combined with high quality and well designed soft landscaping.**

C. Until such a time that Building Regulations approved documents make Part M4 (2) category buildings mandatory for all new homes, all homes should be constructed to Building Regulations Part M4 (2) accessible and adaptable standard (as amended) unless it can be demonstrated that the application of this requirement would render a development unviable, supported by an independent viability assessment that demonstrates that the application of the standard would make the development unviable. In addition, the provision of homes constructed to Building Regulations Part M4(3) for wheelchair accessible homes will also be supported.

5.19 This policy responds to the Government's encouragement that neighbourhood plans should set out local design guidance by refining NFDC Policy ENV3 and NFNPA Policy DP18.

5.20 The Lymington Local Distinctiveness SPD has been a material consideration since 2011 and remains broadly up to date and crucial in guiding the design of schemes in Lymington and Pennington Parish. The SPD is therefore an integral part of the policy but is extensive in distinguishing different areas of the town and is therefore published separately to the Neighbourhood Plan as its Appendix C. LPTC will seek to work with NFDC and local community groups in the preparation of a District wide Design Code which is intended to retain the emphasis on local distinctiveness. The Code will be consulted upon as part of a separate process in due course.

5.21 Applicants will therefore be expected to have acknowledged, understood and responded positively to the SPD as relevant to the location, scale and nature of their proposals. Where a proposal does not seek to follow the requirements of the SPD then the applicant will be obliged to justify why an exception should be made, for example, because a scheme meets the Net Zero Carbon provisions of Policy LP11 requiring a design solution that cannot fully comply with the SPD. Whilst Appendix C has undergone the process of being adopted as an SPD, this policy seeks to provide it with a status of the full weight of the development plan, rather than a material consideration as SPD's are normally considered.

5.22 The policy also seeks to retain provisions included in the Lymington and Pennington Design Guidelines and Codes at the Regulation 14 stage of this plan. Its content duplicated many existing national and strategic policy provisions and other neighbourhood plan policies. In responding to important stakeholder comments following the Regulation 14 consultation and to avoid unnecessary duplication as per the NPPF provisions, the Lymington and Pennington Design Guidelines and Codes has therefore been removed from the plan. However, the policy, in its Clauses B and C, has drawn out those matters from the Lymington and Pennington Design Guidelines and Codes that is considered is not sufficiently covered by existing national and strategic policy provisions or other neighbourhood plan policies. The Town Council remains committed to securing high quality design and will continue to do so through its responses to planning applications, higher tier design codes and guidance, emerging local plans, and through any future reviews of this plan.

POLICY LP7: PROVIDING A BALANCED MIX OF DWELLINGS TO MEET LOCAL NEEDS

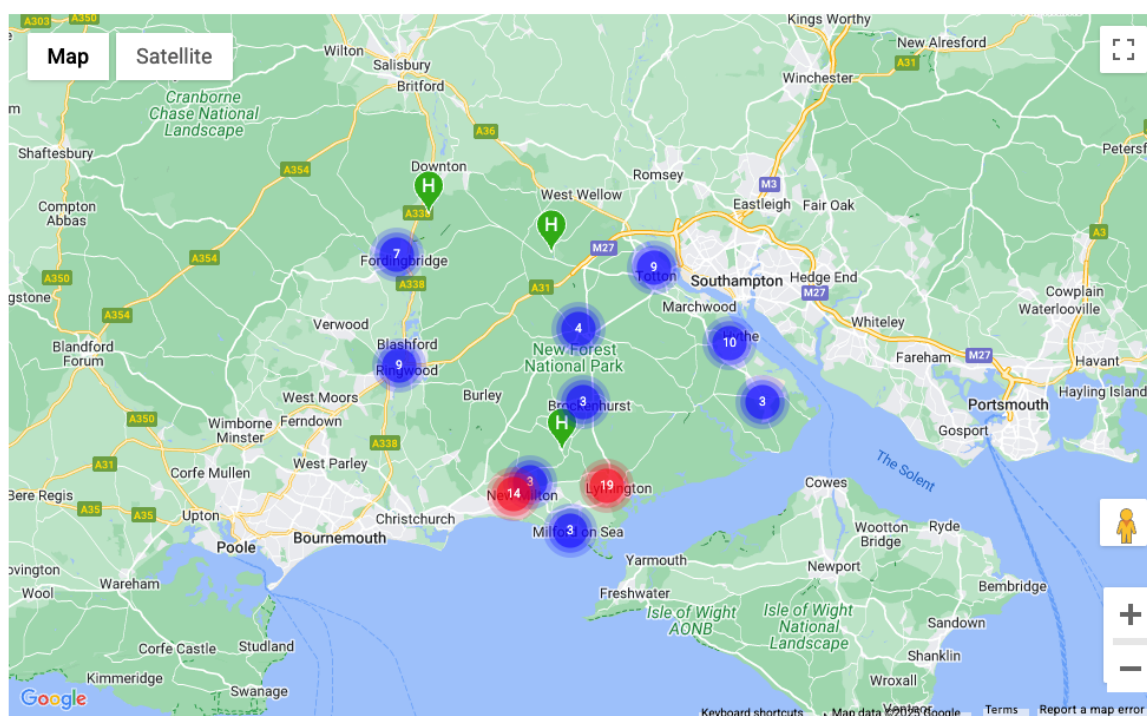
- A. Proposals for residential development will be expected to provide a mix of dwelling types and sizes to address the nature of local needs and contribute to the objective of creating a mixed and balanced community.**
- B. To achieve this objective, new residential development must seek to include in their housing mix smaller dwellings that have one or two bedrooms and a tenure suitable for those looking to rent/buy their first home and downsizers. The number of small dwellings should be greater than 50% of the total in schemes of five or more dwellings, taking into account the viability of the scheme.**
- C. The Neighbourhood Plan encourages schemes to give full consideration to deliver some of the affordable housing element through a Community Land Trust, or equivalent body, for which an appropriate lettings policy will be agreed between the Trust and the District Council/Park Authority.**

5.23 The policy seeks to diversify the housing stock to allow younger people/families with a local connection to Lymington and Pennington to remain in the town. The provision of a stock of small housing units would also give the elderly an opportunity, if they wish, to vacate their larger dwellings, yet remain resident in the town and provide an opportunity for younger and/or key worker, one and two person households to find suitable accommodation in the area. Better utilisation of the existing housing stock is unlikely to occur unless smaller units are available either by the construction of new small dwellings or by the conversion of existing properties. The provision of the policy is key in seeking a mixed and balanced demographic.

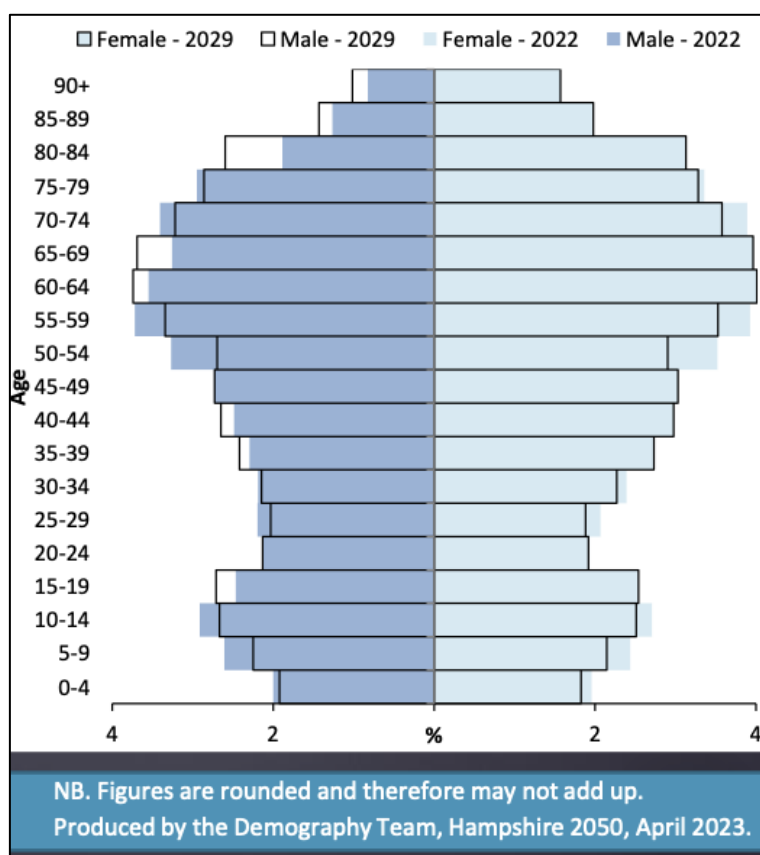
5.24 NFDC Local Plan Part 1 Policy HOU1 on housing type, size, tenure and choice states that proposals should improve the diversity of housing choice. It's paragraph 6.5 recognises that the existing housing stock of the Plan Area is predominantly 3 and 4 bedroom homes and that a turnover within the existing housing stock will continue to be the main source of supply for meeting future demand for larger homes. In this respect the Neighbourhood Plan has adopted the definition of smaller homes as being 1 and 2 bedroom homes. The provision of a given proportion of smaller dwellings (i.e. greater than 50% of the total) will also ensure an efficient use of land in the built-up areas of the town. The policy is intended to provide a starting point for proposals in Lymington and Pennington to achieve that aim. It is necessary to diversify the local housing stock to generally improve choice by prioritising two broad local housing markets, young people and families new to the housing market and older people whose opportunity to downsize may be limited. In this respect the Town

Council will continue to resist additional retirement homes to an otherwise already saturated market.

5.25 The figures below show a simple search conducted for housing and care homes held by the Elderly Accommodation Counsel (ECA), a national charity which supports older people in finding housing and care. There are 18 separate sites offering housing for older people, by far the largest provider of such homes, with only New Milton not far behind, when compared to the remainder of the district. (One of the sites is recorded twice on the map hence the figures shows 19). According to the ECA there are 507 retirement homes built in Lymington, see table below. A further 32 retirement flats are under construction on the site of the former police station and will be completed in 2025.



5.26 As of 1 April 2024 the total number of market dwellings started since 2019/2020 within Lymington and Pennington Parish (in the NFDC area) is 182 market dwellings. 76 of those dwellings were for market retirement dwellings. 42% of open market dwellings since 2019 has therefore been for retirement homes (These figures have been supplied by NFDC). The figure below also demonstrates why this is necessary to start to address the district's skewed age profile. This also broadly aligns with the adopted NFNPA Local Plan which includes several policy approaches to increase the stock of smaller dwellings in the National Park, as well as safeguarding the existing stock of smaller dwellings.



Source: <https://documents.hants.gov.uk/population/Factsheet-NewForest.pdf>

5.27 The provisions of the policy are therefore considered to be a necessary step to secure a more balanced community in the longer term and provide opportunities for younger people and 'downsizers' to be able to access housing which otherwise the market would not deliver.

5.28

To the extent that affordability is an issue, it is important that all possible steps are explored including a longer-term potential for Community Led housing. The policy therefore also encourages landowners and their future development partners to give full consideration to the desire by the local community to see a proportion of new homes delivered by a new Community Land trust, or equivalent body. This is not a policy requirement, but there is local community support to deliver housing in the parish in this way to ensure that local needs

are prioritised and homes are genuinely affordable in perpetuity. In the event that such a model is pursued an appropriate lettings policy will be agreed with NFDC and NFNPA. Where this is not delivered in this way, the adopted NFDC and NFNPA Local Lettings Policy for the area will continue to apply. The Town Council will continue to seek to negotiate high levels of affordable homes for rent.

POLICY LP8: GREEN INFRASTRUCTURE AND NATURE RECOVERY NETWORK

- A. The Neighbourhood Plan designates a Green Infrastructure and Nature Recovery Network, as shown on the Green Infrastructure and Nature Recovery Map, for the purpose of promoting ecological connectivity, outdoor recreation and sustainable movement through the parish and into the National Park; helping to mitigate climate change. The Network comprises the town's variety of green spaces, ancient woodland, trees and hedgerows, water bodies, Safer Lanes Network, assets of biodiversity value, children's play areas and recreational playing fields.**
- B. Development proposals that lie within or adjoining the network are required to have full regard to maintaining and improving the functionality of the network, including delivering a net gain to biodiversity and improving connections to existing green infrastructure assets and the wider countryside, in the design of their layouts and landscaping schemes. Proposals that will harm the functionality or connectivity of the network will not be supported.**
- C. All appropriate development should embed Green Infrastructure in a way that helps to support nature recovery to reverse the decline in biodiversity and result in a net gain. Development proposals that will lead to an extension of the network will be supported, provided they are consistent with all other relevant policies of the development plan.**
- D. The Policies Map shows those parts of the designated Network that are known or likely to have biodiversity value. For the purpose of calculating Biodiversity Net Gain requirements using DEFRA's latest metric, development proposals located within or adjoining that part of the Network should anticipate achieving at least a medium distinctiveness multiplier score.**
- E. Any proposal that can demonstrate that off-site compensation to mitigate for biodiversity loss is necessary must follow a sequential approach to its delivery. The gain should be delivered within or adjoining the network where the land is suited in principle for delivering the necessary gain. If this is not practical, then gain should be delivered on land within an adjoining Parish that is suited in principle for delivering the necessary**

gain. Only if it can be shown that this is not practical may the gain be delivered on other land.

5.29 The policy defines the presence of green and blue infrastructure assets in the Parish. Green infrastructure is a network of multi-functional green space and other green features, urban and rural, which can deliver quality of life and environmental benefits for communities. Green infrastructure is not simply an alternative description for conventional open space. It includes parks, open spaces, playing fields, woodlands – and also street trees, allotments, private gardens, green roofs and walls, sustainable drainage systems (SuDS) and soils. It also includes rivers, streams and other water bodies, sometimes called 'blue infrastructure'.

5.30 Nature Recovery means leaving nature in a better state than we found it and is typically achieved by:

- Restoring protected sites to favourable condition.
- Creating or restoring habitats outside of protected sites - the "stepping stone" habitats.
- Supporting the recovery of species.
- Increasing woodland cover.

5.31 All of the above are the ingredients which contribute towards a Green Infrastructure and Nature Recovery Network, of which the network defined for Lymington and Pennington parish will form a small part of what eventually will become a national network of connected wildlife-rich places to address the 'climate and ecological emergency'. In this respect a Local Nature Recovery Strategy is being prepared for Hampshire which will further inform the priorities for nature recovery.

5.32 The policy requires that all development proposals that lie within the Network, or that adjoin it, should consider how they may improve the Network, or at the very least do not undermine its integrity of connecting habitats. The Green Infrastructure and Nature Recovery Map shows the full extent of the Network, which allows applicants to determine if their proposals should take this policy into account. Where proposals include provision for landscaping, new means of access or new layouts, there may be an opportunity to relate the land better to the Network, for example in complementing existing biodiversity value through the design of the landscape scheme. At the very least, the policy requires that proposals that will undermine the existing value of the Network will be a reason for refusal of planning permission.

5.33 Clause D relates to those parts of the Network of biodiversity value. Given it includes all defined priority habitats and semi-natural habitats, native hedgerows and trees and natural water bodies, the clause anticipates that the distinctiveness multiplier score of the BNG Metric (from very low to very high) will be at least medium. Clause E sets out how the loss of biodiversity-value will be addressed through a sequential approach. The new

biodiversity net gain requirement of at least 10% (as set out the Environment Act of 2021) should be delivered either onsite or within or adjoining the Network so that the benefits of development are accrued as close as possible to the development site. However, it is accepted that the Network in the Parish may not be suited to delivering every type of required off-site gain. In such cases Clause E allows for the gain to be delivered in adjoining Parishes or, as a final resort, on land elsewhere.

5.34 The policy provides a local element to the provisions of NFDC Policy STR1, ENV1 and DM2 together with NFNPA Policy SP6 and SP9 seek to protect, maintain and enhance biodiversity and green infrastructure assets. NFDC has also prepared 'Interim Guidance on Biodiversity Net Gain' to ensure that each development will make provision for biodiversity improvements. Similarly, NFNPA also require environmental enhancements to be achieved as described in Section 7 of their Design Code SPD.

5.35 The Parish is an area rich in wildlife and contains a range of high-quality natural habitats that are greatly valued by the local community and visitors. The eastern boundary of the Parish is defined by the Lymington River which follows a meandering path through mudflats to join the Solent. The river and its marine related functions are a fundamental part of the character of Lymington. The landscape character of the eastern boundary is a combination of a wetland floodplain along the river to the north of the B3054 river crossing, and a developed edge defined by the marine activities associated with the River Lymington to the south, including employment uses, sheds, harbours, pontoons and slip ways.

5.36 The railway line also runs into the town along this edge with the station located on a bend in the river behind the recent residential development at Almansa Way. The river frontage along the northern part of this boundary is relatively inaccessible given the railway line but opens up to the south of Haven Quay as the railway line crosses the river to the Lymington Pier terminus. This southern part of the river contains the yachting and marine industry related environment that is part of the Lymington character and attraction. Lymington Reedbeds SSSI lies north of the river crossing. Lymington River SSSI is also recognised as an important nature conservation area, bordered by mudflats and saltmarshes that are vital to the ecosystem surrounding the estuary.

5.37 The southern boundary follows the coastline along the Solent and includes a number of inlets formed by the drainage ditches and watercourses. The landscape character between this boundary and the southern edge of the settlement is a rich wetland habitat of marshes, drains and mudflats with views across to the Isle of Wight and contains the Lymington and Keyhaven Marshes Local Nature Reserve, also designated as part of the Solent and Southampton Water SPA and RAMSAR. The ecological value of the Safer Lanes Network also makes a substantial contribution to the Network connecting the urban area with the saltmarshes.

5.38 The Nature Reserve is historic and has nature conservation importance, being a habitat recognised nationally and internationally. Hampshire County Council began taking

ownership of the area in 1974 purchasing Normandy Farm. Subsequently they took ownership of Pennington Marshes (1979) and Keyhaven Marshes (1984). This was in response to the rate of development and loss of habitat in the previous decades. Today, the reserves cover over 1200 hectares and incorporate mudflats, salt marshes, shingle banks, coastal grazing marshes, and saline lagoons and supports important populations of birds and rare and specialist plants and invertebrates.

5.39 The western boundary follows the course of Avon Water, a watercourse that flows from the New Forest into the Solent linking a number of marsh and meadow Sites of Importance for Nature Conservation (SINCs) along its route. To the east of Avon Water lies Upper Pennington and Pennington Common SSSI's which form the Core Area to the west of Ramley Road. The river corridor is wooded along its course with additional woodland belts and copses separating the western developed edge of Lymington/Pennington from the village of Everton to the west which is outside the Neighbourhood Plan boundary.

5.40 The northern boundary runs along a tributary to the Lymington River before following the rear of the properties along the northern side of Sway Road. The landscape character of this area up to the northern edge of Lymington is still predominantly rural with a combination of arable and pasture fields, farm buildings and access tracks. This area also includes the Bucklands Ring Fort, which is a Scheduled Ancient Monument.

5.41 The mapping has been derived from the Hampshire Biodiversity Information Centre (HBIC). HBIC have mapped the Lymington and Pennington Ecological Network. The network forms the basis of the identification of the Lymington and Pennington Green Infrastructure and Nature Recovery Network Map overleaf. The network is hierarchical and based on the following components:

- Biodiversity Opportunity Areas (BOAs) - the Strategic Network
- Core Statutory Sites
- Core Non-statutory Sites
- Network Opportunity Areas

5.42 The Lymington and Pennington Green Infrastructure and Nature Recovery Map overleaf comprises:

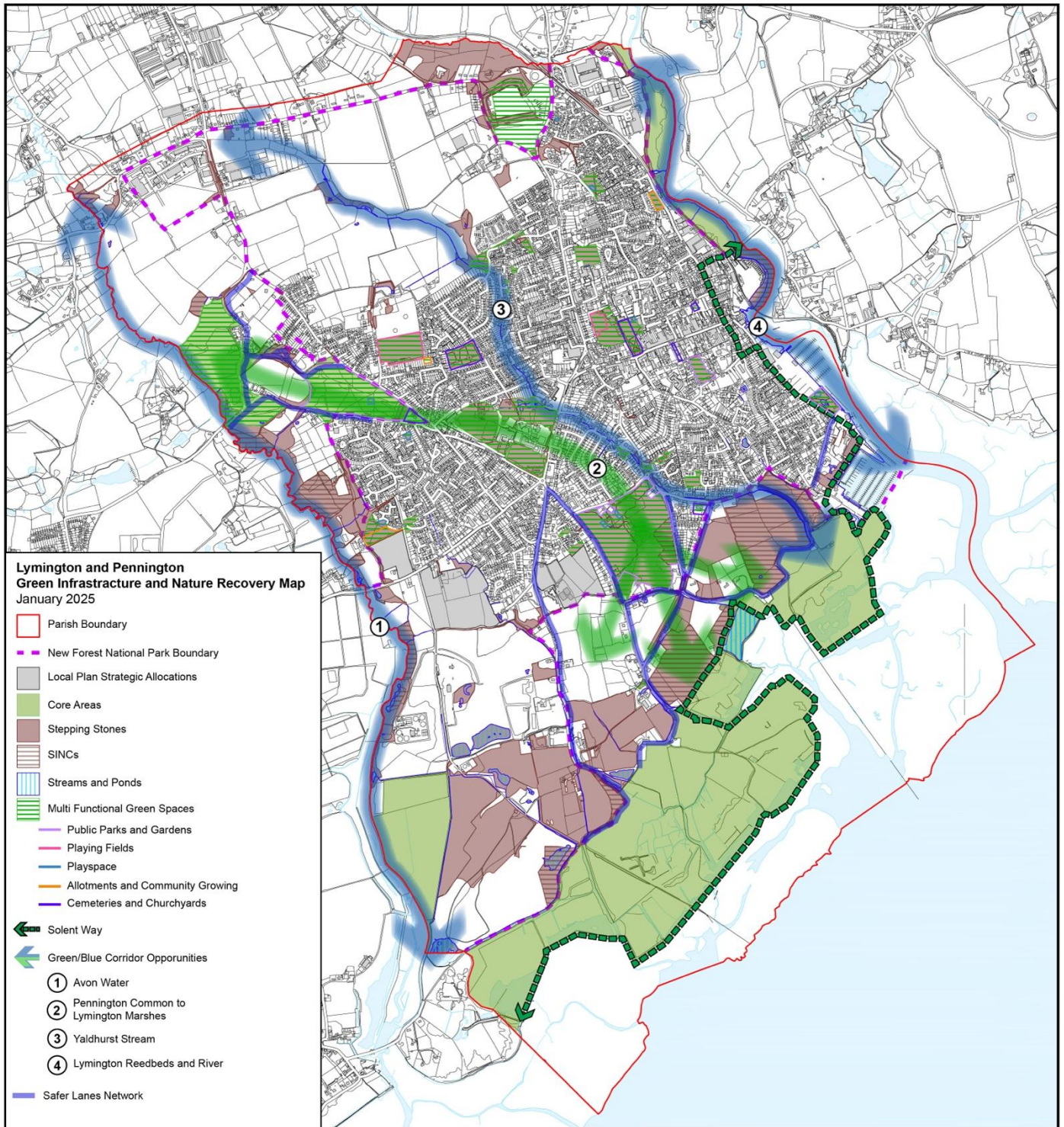
5.43 Core Areas: These comprise statutory designated sites including Sites of Special Scientific Interest, and Local Nature Reserves. Here this will include the Safer Lanes Network.

5.44 Stepping Stones: These comprise non-statutory sites and may include Sites of Importance for Nature Conservation, Priority Habitats and Woodland. Within towns and villages they also include amenity greenspace, parks and gardens, playing fields, cemeteries and allotments.

5.45 Network Opportunity Areas: These may be areas of woodland, neutral or calcareous grassland and other linear features such as hedgerows and watercourses which also offer network opportunities.

5.46 'Green/Blue Corridor' Opportunities: In the case of Lymington and Pennington, the 'Network Opportunities' component of the HBIC mapping; the application of Natural England's guidance (Ref. 2) together with local knowledge of urban green and blue spaces have been used to identify the four 'Green/Blue Corridor opportunities'. These corridors could equally be used, where appropriate, to inform proposals to achieve biodiversity net gain as part of the planning application process in line with provisions of the Neighbourhood Plan policy to promote the restoration and re-creation of priority habitats including increasing the size of existing wildlife sites, enhance connections between sites, either through physical corridors or through 'stepping-stones', enable the recovery and enhancement of priority species populations.

5.47 Hampshire County Council and NFDC conducted a consultation on the draft Local Cycling and Walking Infrastructure Plan (LCWIP) ([link](#)) in September-November 2024 and anticipates adopting this in Summer 2025. Also of relevance is the Hampshire Countryside Access Plan ([link](#)).



Plan I: Green Infrastructure and Nature Recovery Map

POLICY LP9: SAFER LANES NETWORK

- A. The Neighbourhood Plan identifies a Safer Lanes Network, as shown on the Policies Map, for the purposes of protecting the rural and historic characteristics of the lanes and promoting the lanes as shared spaces.**
- B. Where relevant to the nature, scale and location, proposals should preserve, and where practicable enhance, the rural character and tranquillity of the Safer Lanes Network having regard to the key objectives set out in Clause C below.**
- C. Safer Lanes Network Key Objectives:**
 - i. Retaining the key rural characteristics of the lanes including tree and hedgerow lined frontages with any fencing set back from the lane and screened with hedgerow planting, permeable frontages, and the retention and maintenance of ditches and verges avoiding the introduction and use of culverts;**
 - ii. Avoiding the introduction of urbanising highways infrastructure, including reducing unnecessary lighting pollution and avoiding the introduction of inappropriate lighting schemes;**
 - iii. Preventing parking on verges using infrastructure appropriate to a rural setting. Where parking is necessary, mitigating any harm to the biodiversity value provided by verges;**
 - iv. Prioritising non-motorised users of the lanes and avoiding the introduction of transport and access arrangements which adversely effects their use by non-motorised users and the rural and historic characteristics of the lanes.**

5.48 The historic lanes in Lymington and Pennington are an important feature in the character of the area and hold value as recreational routes. They continue to provide insights into past communities and their activities, may contain archaeological potential, have considerable ecological value as habitats serving as corridors for movement and acting as vital connections between other habitats, and also promote well-being for non-motorised users. The policy seeks to protect these lanes by preserving, as far as possible, the trees, hedgerows, banks, ditches and verges which contribute to their character and by resisting development proposals which have a detrimental effect on them.

5.49 The Lymington Local Distinctiveness SPD notes rural lanes which led down from the town to the salterns, withy beds, fishermen's cottages and the old sea water baths pre-date common use of the motor car and inform much of the character of the Waterford and Westfield area. Throughout the area of Pennington the original routes of the old lanes remain of vital importance to the character of the place and in the Rural Lanes character area notes that the edges of lanes have a huge effect upon the character of the place. It goes on to note that old rural lanes and their green and varied edges, verges, ditches, as well as hedgerow boundaries and mature native trees, can positively inform new development proposals. Verges along the older lanes are important and under threat from car encroachment, as well as new access points and any further car standing areas. Any proposals which involve the reinforcement of the character and tranquillity of these lanes or which improve user safety and widen non- motorised access choices will be supported. Proposals should also have regard to the NFDC adopted Parking Standards SPD ([link](#)).

5.50 Hampshire County Council and NFDC conducted a consultation on the draft Local Cycling and Walking Infrastructure Plan (LCWIP) ([link](#)) in September-November 2024 and anticipates adopting this in Summer 2025.

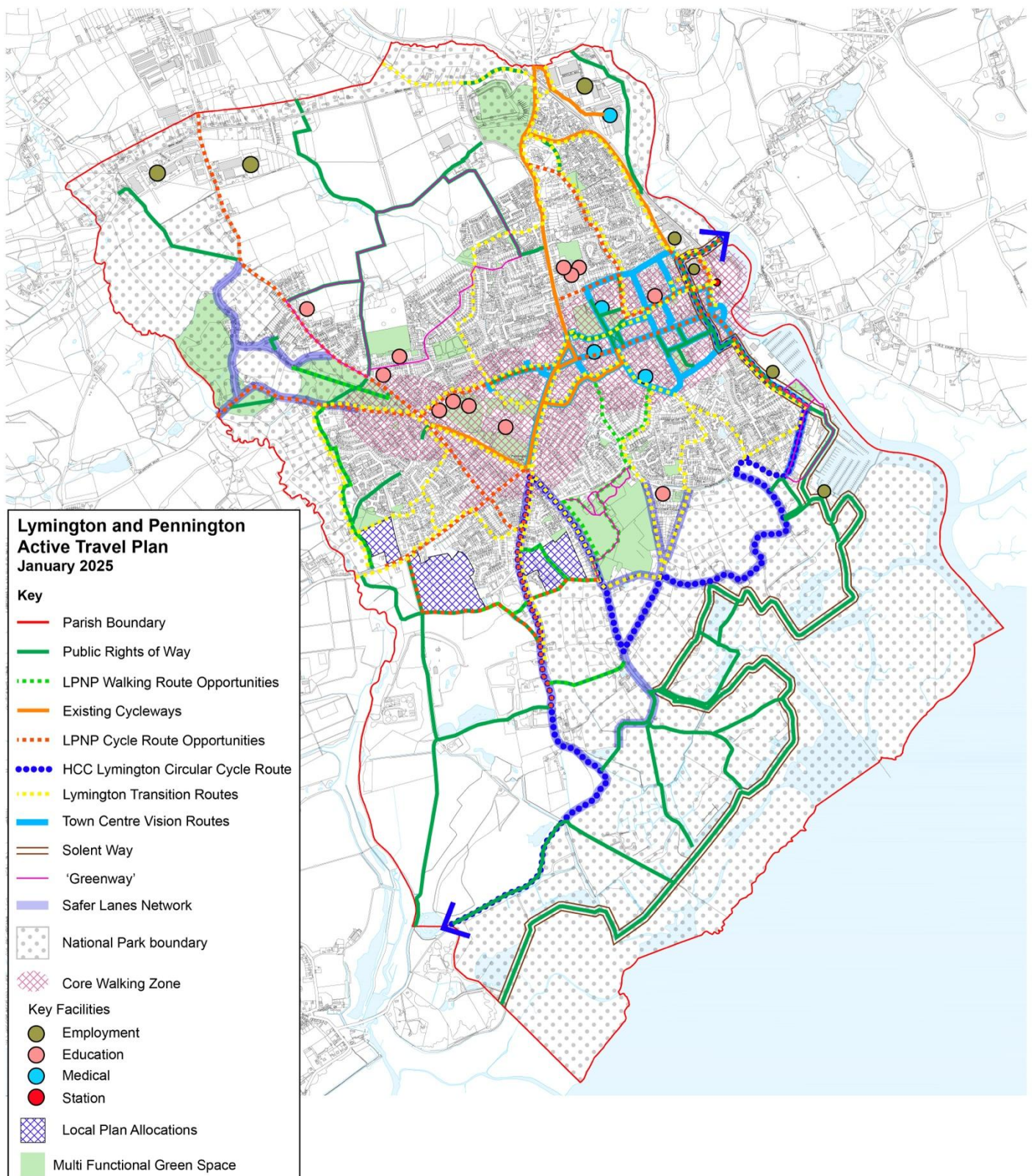
POLICY LP10: ACTIVE AND HEALTHY TRAVEL

- A. The Neighbourhood Plan identifies the existing Sustainable Travel Network and opportunities for improvements, as shown on the Lymington and Pennington Active Travel Plan, for the purpose of supporting healthy and safe active travel opportunities in the Parish.**
- B. Development proposals on land that lies within or adjacent to the Network should sustain, and where practicable, enhance the functionality of the Network by virtue of their layout and means of access and landscape treatment.**
- C. Proposals that avoid harm to the functioning or connectivity of the Network, or opportunities for improvements to the Network, will be supported.**

5.51 The policy seeks to encourage safe, accessible, convenient and enjoyable means of active travel in the parish which will likely also lead to improvements of the physical and mental wellbeing of users. Active travel refers to modes of travel that involve a level of activity, including walking and cycling, as well as trips made by wheelchair, mobility scooters and adapted cycles. It refines NFDC Local Plan Part 1 Policies CCC1 and CCC2 and NFNPA Local Plan Policies SP54 and SP55 by providing a local element to its provisions. There may also be other opportunities for improvements to the Network which have no spatial consequence, such as wayfinding projects.

5.52 Lymington and Pennington have a good network of links, including the Coastal Path, incorporating part of the Solent Way Trail, and a coastal route stretching 60 miles from Milford-on-Sea to Emsworth Harbour. The Active Travel Plan shown below shows the location of the existing routes, which allow applicants to determine if their proposals should take this policy into account. The policy requires that all development proposals that lie within or adjacent to the Network to consider how they may improve, or at the very least do not undermine the existing value of the Network, or the opportunities for improvement.

5.53 Where proposals include provision for amenity spaces, landscape, new means of access or new layouts, there may be an opportunity to relate the land better to the Network and/or improve the attractiveness and connectivity of routes. Proposals should therefore consider this in the design of their schemes without undermining other planning policy objectives. In some cases, proposals will enable the creation of new connections and/or the delivery of opportunities for improvement that extend the benefits of the Network. They will be supported provided they are appropriate in other respects. At the very least, the policy requires that proposals that will undermine the existing value of the Network, or opportunities for improvement, will be refused permission.



Plan J: Active Travel Plan

POLICY LP11: NET ZERO CARBON BUILDING DESIGN

- A. All development (except for householder development) should be “zero carbon ready” by design to minimise the amount of energy needed to heat and cool buildings through landform, layout, building orientation, massing and landscaping. Consideration should be given to resource efficiency at the outset and whether existing buildings can be re-used as part of the scheme to capture their embodied carbon.**
- B. Where feasible, buildings should aim to be certified to a Passivhaus or equivalent standard with a space heating demand of less than 15KWh/m2/year.**
- C. All planning applications for new or refurbished buildings should include a demonstration to show that their energy efficiency has been tested to ensure that the buildings will perform as predicted at the design stage.**
- D. All planning applications for major development are also required to be accompanied by a Whole Life-Cycle Carbon Emission Assessment, using a recognised methodology, to demonstrate actions taken to reduce embodied carbon resulting from the construction and use of the building over its entire life.**
- E. Climate Change Statement will be submitted to demonstrate compliance with the policy (except for householder applications). The statement will include a passive design capacity assessment to demonstrate how opportunities to reduce the energy use intensity (EUI) of buildings over the plan period have been maximised in accordance with the energy hierarchy. Designers shall evaluate the operational energy use using realistic information on the intended use, occupancy and operation of the building to minimise any performance gap.**

5.54 The policy is in five parts, the combination of which is intended to deliver a step change in the energy performance of all new developments in the Parish and, in doing so, encourage and incentivise the use of the Passivhaus or equivalent standard of building design. The policy has been informed by the Ringwood Neighbourhood Plan Policy R11 which has recently been successful at examination.

5.55 Clause A of the policy requires developers to ensure they address the Government's climate change targets and energy performance at the very initial stages of design. 'Zero Carbon Ready' by design means making spatial decisions on layout and orientation of buildings at the outset to maximise the passive design benefits ('free heat') of a site and

avoids leaving this to technical choices and assessment at the Building Regulation stage, by which time the opportunity may have been lost. Applicants are directed to the Net-Zero Carbon Toolkit created by Cotswold District Council and two partner councils, WODC and Forest of Dean District Council. The toolkit is available as a resource for private and public sector organisations to use and adopt ([link](#)).

5.56 There is a growing evidence base to suggest that buildings do not perform as well as anticipated at design stage. Findings demonstrate that actual energy consumption in buildings will usually be twice as much as predicted. This passes on expensive running and retrofitting costs to future occupants. Clause C of the policy therefore requires that every building in a consented development scheme of any size is subject to Post-Occupancy Evaluation (POE) including actual metered energy use, and to submit the report to the local planning authority. It will be implemented by attaching a planning condition, which will only be discharged once the report has been submitted and any recommended actions to rectify any performance gap with the design stage assessment are carried out by the developer. There is no current adopted development plan policy which seeks to deal with the performance gap. In the absence of supplementary guidance from NFDC on POE, guidance has been included in Appendix B. Passivhaus certified schemes will not fail in this way and they are therefore exempted from this policy requirement. PassivHaus is the most common and rigorous design approach, although the build cost is slightly higher than normal, the ongoing energy cost to occupiers is a fraction of the cost now (so avoiding fuel poverty).

5.57 To further incentivise the use of Passivhaus, or equivalent standard, Clause B of the policy acknowledges that there may sometimes be a trade-off between its objectives and local design policy. Although meeting these objectives ought not to compromise a scheme fitting in with the character of a local area, on occasions this may be the case. It therefore allows for some degree of flexibility in meeting local design guidance, especially in terms of prevalent building orientation and density.

5.58 Proposals seeking to apply the Passivhaus Planning Package (PHPP) must be able to demonstrate that the Passivhaus standard can be achieved. Prior to commencement a 'pre-construction compliance check' completed by a Passivhaus Designer accredited by the Passive House Institute (PHI) will be required and secured by condition. Upon completion a Quality Approved Passivhaus certificate for each building will be required prior to occupation, again secured by condition.

5.59 Clause D requires all development proposals that are not householder applications to be accompanied by a Whole Life-Cycle Carbon Emissions Assessment, RICS methodology is preferred ([link](#)). The assessment will enable the design team to understand and respond to the lifetime consequences of their design decisions and to design for adaptability, longevity and disassembly; contributing to resource efficiency (Clause A) and contributing to the 'circular economy'. This requirement will be added to the NFDC/NFNPA Council Validation Checklist for outline and full planning applications applying to proposals in the Neighbourhood Plan area until such a time that there is a district-wide requirement.

5.60 Clause E requires the Climate Change Statement for applications already required to be submitted to cover the following:

- an assessment of the proposal to minimise regulated and unregulated emissions, the embodied emissions and the emissions associated with maintenance, repair and replacement of the new building(s), as well as its dismantling, demolition and eventual material disposal
- a calculation of the energy and carbon emissions covered by the Future Homes Standard and Building Regulations and, separately, the energy demand and carbon emissions from any other part of the development that are not covered by the Future Homes Standard or Building Regulations
- the proposal to reduce carbon emissions beyond the Future Homes Standard and Building Regulations through the energy efficient design of the site, buildings and services
- the proposal to further reduce carbon emissions through the use of zero or low emission decentralised energy where feasible
- the proposal to further reduce carbon emissions by maximising opportunities to produce and use renewable energy on-site, utilising storage technologies where appropriate
- the proposal for a demand-side response, specifically through installation of smart meters, minimising peak energy demand and promoting short-term energy storage
- an analysis of the expected cost to occupants associated with the proposed energy strategy

5.61 Every new build or redevelopment project in the Neighbourhood Plan area provides an opportunity to make a difference and a contribution towards meeting our climate change targets for 2050. This new information requirement need not be an unreasonable expectation of even the smallest schemes for new buildings.

Net Zero Operational Carbon

Ten key requirements for new buildings

By 2030 all new buildings must operate at net zero to meet our climate change targets. This means that by 2025 all new buildings will need to be designed to meet these targets. This page sets out the approach to operational carbon that will be necessary to deliver zero carbon buildings. For more information about any of these requirements and how to meet them, please refer to the: UKGBC - Net Zero Carbon Buildings Framework; BBP - Design for Performance initiative; RIBA - 2030 Climate Challenge; GHA - Net Zero Housing Project Map; CIBSE - Climate Action Plan; and, LETI - Climate Emergency Design Guide.

Low energy use

- 1 Total Energy Use Intensity (EUI) - Energy use measured at the meter should be equal to or less than:
 - **35 kWh/m²/yr** (GIA) for residential¹

For non-domestic buildings a minimum DEC B (40) rating should be achieved and/or an EUI equal or less than:

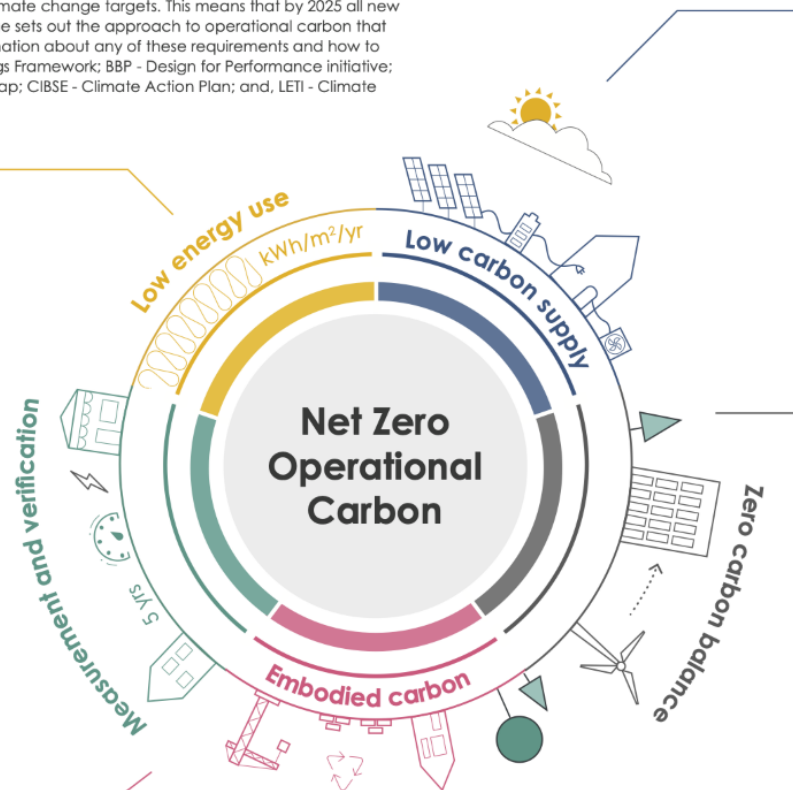
 - **65 kWh/m²/yr** (GIA) for schools¹
 - **70 kWh/m²/yr** (NLA) or **55 kWh/m²/yr** (GIA) for commercial offices^{1,2}
- 2 Building fabric is very important therefore space heating demand should be less than **15 kWh/m²/yr** for all building types.

Measurement and verification

- 3 Annual energy use and renewable energy generation on-site must be reported and independently verified in-use each year for the first 5 years. This can be done on an aggregated and anonymised basis for residential buildings.

Reducing construction impacts

- 4 Embodied carbon should be assessed, reduced and verified post-construction.³



Low carbon energy supply

- 5 Heating and hot water should not be generated using fossil fuels.
- 6 The average annual carbon content of the heat supplied (gCO₂/kWh) should be reported.
- 7 On-site renewable electricity should be maximised.
- 8 Energy demand response and storage measures should be incorporated and the building annual peak energy demand should be reported.

Zero carbon balance

- 9 A carbon balance calculation (on an annual basis) should be undertaken and it should be demonstrated that the building achieves a net zero carbon balance.
- 10 Any energy use not met by on-site renewables should be met by an investment into additional renewable energy capacity off-site OR a minimum 15 year renewable energy power purchase agreement (PPA). A green tariff is not robust enough and does not provide 'additional' renewables.

Notes:

Note 1 - Energy use intensity (EUI) targets
The above targets include all energy uses in the building (regulated and unregulated) as measured at the meter and exclude on-site generation. They have been derived from: predicted energy use modelling for best practice; a review of the best performing buildings in the UK; and a preliminary assessment of the renewable energy supply for UK buildings. They are likely to be revised as more knowledge is available in these three fields. As heating and hot water is not generated by fossil fuels, this assumes an all electric building until other zero carbon fuels exist. (kWh targets are the same as kWh_{net,elec}). Once other zero carbon heating fuels are available this metric will be adapted.

Note 2 - Commercial offices
With a typical net to gross ratio, 70 kWh/m² NLA/yr is equivalent to 55 kWh/m² GIA/yr. Building owners and developers are recommended to target a base building rating of 6 stars using the BBP's Design for Performance process based on NABERS.

Note 3 - Whole life carbon
It is recognised that operational emissions represent only one aspect of net zero carbon in new buildings. Reducing whole life carbon is crucial and will be covered in separate guidance.

Note 4 - Adaptation to climate change
Net zero carbon buildings should also be adapted to climate change. It is essential that the risk of overheating is managed and that cooling is minimised.

Developed in collaboration with:



Developed with the support of:



POLICY LP12: URBAN GREENING AND CANOPY COVER

- A. Development proposals on sites of 0.5 ha or more outside the Lymington Town Centre boundary, as shown on the Policies Map, should achieve a future canopy cover of at least 25% of the site area principally through the retention of existing trees and the planting of new trees. Where such an approach would be impracticable for viability, layout or design reasons, the use of other green infrastructure (such as green roofs and walls) should be used where they can offer similar benefits to trees.**
- B. Development proposals in the Lymington Town Centre Boundary, and on sites of less than 0.5 ha, should maximise the opportunities available for canopy cover, including tree retention and planting or the provision of other green infrastructure (such as green roofs and walls).**

5.62 The i-Tree Canopy tool was created by Forest Research as part of a baseline study The Canopy Cover of England's Towns and Cities: baselining and setting targets to improve human health and well-being (Trees People and the Built Environment 3, 2017). Forest Research is currently undertaking a mapping exercise to build an urban canopy cover map of the UK. It indicates that the majority of the built-up area of Lymington and Pennington currently has <15-20% of canopy cover.

5.63 Canopy cover is the layer of leaves, branches and tree stems that cover the ground. Trees help mitigate the environmental and social challenges our built-up areas, especially our Town Centre, face in a quantifiable way. This is supported by the Government's NetZero Strategy: Build Back Greener October 2021 which recognises the role of green and blue infrastructure, including trees, in providing an opportunity to benefit local economies and bring about long-term improvements in people's health and wellbeing. The policy therefore draws inspiration from others, like Wycombe District Council and Cornwall Council who are operating planning policies which require new development (excluding householder applications) to achieve a quantifiable future canopy cover, with many others in the process of developing this type of policy. The London Plan operates a similar approach with its Urban Greening Factor.

5.64 The policy refines NFDC Local Plan Part Two Policy DM9 which seeks to minimise the loss of green features on sites. Doick et al suggests that "towns and cities with at least 20% cover should set targets to increase cover by at least 5% within ten to twenty years" and given that Lymington and Pennington's canopy cover is below this recommended baseline the policy requires new development to achieve a minimum of 25% canopy cover of the site area to start to bring Lymington and Pennington's canopy cover in line with this baseline (Trees People and the Built Environment 3, 2017). In doing so, a wide range of benefits are expected including storing carbon, reducing the urban heat island effect and improving air quality. The policy has been designed to be applied in a flexible way. In

specific terms it acknowledges that issues such as commercial viability, site layouts and design may make the expectations of the policy impracticable on a site by-site basis. This will be a matter for NFDC/NFNPA to consider based in the evidence provided with each development proposal. In addition, matters such as site layout and commercial viability may also be affected where development proposals would also need to provide open space and landscaping to meet other policies.

5.65 As NFDC/NFNPA does not currently have guidance for applicants to calculate canopy cover, the adopted Wycombe Tree Canopy Cover Supplementary Planning Document (SPD) provides a Canopy Cover calculator, developed in partnership with Treeconomics Forest Research and Wycombe District Council ([link](#)). This guidance will assist applicants in calculating how their proposed scheme should seek to meet the requirements of the policy, until such a time that NFDC/NFNPA adopts its own guidance.

POLICY LP13: DIGITAL COMMUNICATION INFRASTRUCTURE

A. Proposals are required to be sensitively located and designed in order to avoid or minimise potential harm to designated heritage assets or adverse effects to the special landscape and scenic beauty of the National Park. The public benefit of improving access to digital communication infrastructure in the area will carry significant weight in the planning balance of proposals that may cause harm to designated heritage assets or to the special landscape and scenic beauty of the National Park.

5.66 This policy seeks to encourage the provision of new digital communications infrastructure that will drive technological advancements necessary to support new businesses and homes. This infrastructure includes the installation of new transmitters, antennas, junction boxes and satellite dishes. Creative industries, office space and commerce rely on high speed, reliable connectivity but this is difficult in rural areas. It is acknowledged that many such works may be permitted development but where they are not then the policy requires that significant weight is attached to the public benefit of having access to this infrastructure when weighed against any harm to heritage and landscape in the planning balance of each proposal. To clarify, the policy is not encouraging harm to heritage assets or to the special landscape and scenic beauty of the National Park. The level of harm to these important assets will still need to be identified and weighed against the proposal. The policy is simply making it clear that the benefit of having access to digital communication infrastructure should carry significant weight in considering whether benefits outweigh the harm identified.

6. IMPLEMENTATION & MONITORING

6.1 The policies of the Neighbourhood Plan will be implemented through the determination of planning applications by the respective Local Planning Authorities consideration and determination of planning applications for development in the designated neighbourhood area.

DEVELOPMENT MANAGEMENT

6.2 The Town Council will use a combination of the Local Plans and this Neighbourhood Plan policies to inform and frame its representations on submitted planning applications. The Parish Council is a statutory consultee on planning applications made in the parish and it will be made aware of any future planning applications or alterations to those applications by the relevant planning authority. It will seek to ensure that the Neighbourhood Plan policies have been identified and applied correctly by applicants and by officers in their decision reports.

6.3 Where necessary, the Town Council may seek to persuade the Secretary of State to call-in a planning application that it considers is in conflict with the Neighbourhood Plan but which the planning authority has deemed to consent. Similarly, it may also seek to persuade the Secretary of State to recover an appeal of a refused application, where the conflict with one or more Neighbourhood Plan policies has been important in the reasons for refusal. In both cases, the Town Council will do so if it considers matters of national policy significance (for neighbourhood planning) are raised.

LOCAL INFRASTRUCTURE IMPROVEMENTS

6.4 The Town Council propose that the priorities for investment of future Community Infrastructure Levy, and/or S106 funding received by the local planning authority are:

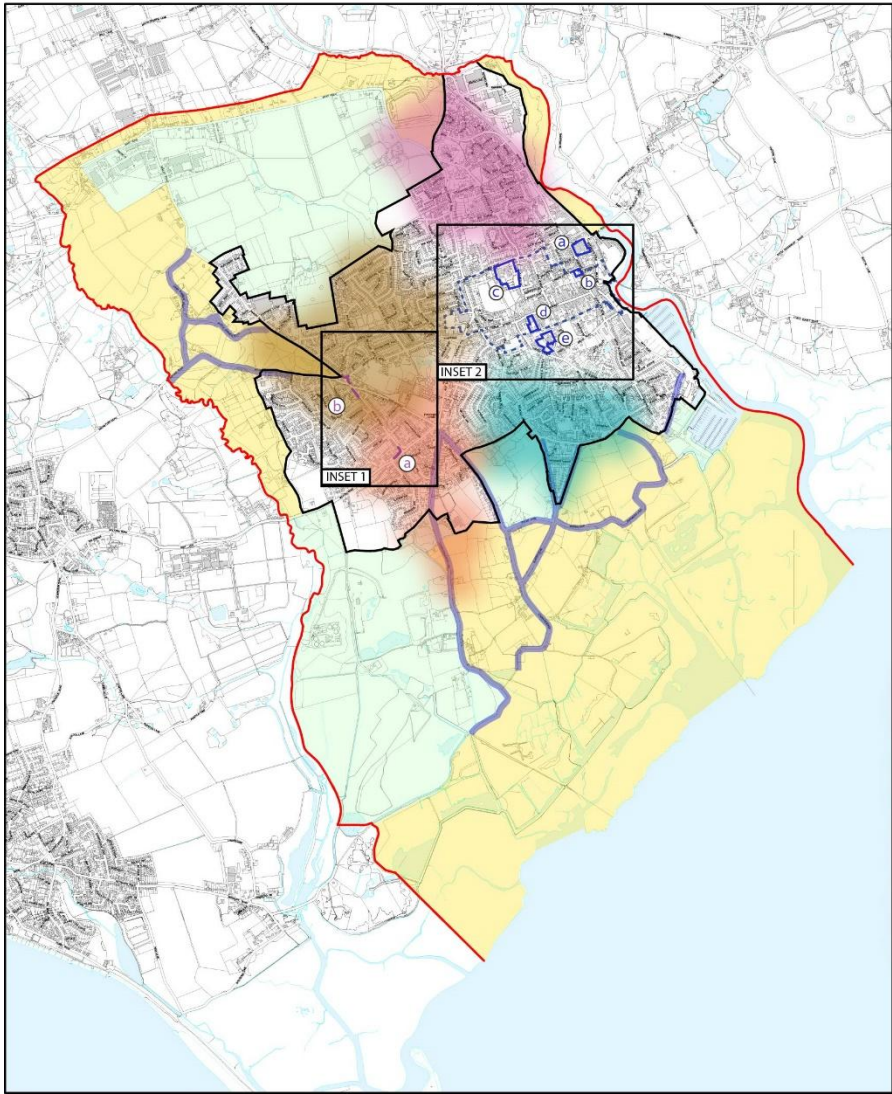
- **High Street** - To make the High Street more accessible and encourage people to spend more time on the High Street by improving the High Street environment, linkages and wayfinding.
- **Captains Row** – Due to the slope of the High Street and Quay Hill, some better crossover points with dropped kerbs and a different crossover section at the critical points is advocated. An example of this could be embedded cobles or pavers across Captains Row at the highest volume crossover point.
- **Grove Gardens** - With a few low key interventions, the open space at Grove Gardens has the potential to be used as a town Park, a green space that is easily accessible to the High Street.
- **The Waterfront, focusing on the Quay** - The River front and quay need a simple public space at the northern end to improve the link to the High Street and provide a focus and destination around the Quay Road/Quay Street/slipway area.
- **The Station** - The station is detached from the High Street and the Waterfront and is an uninviting pedestrian environment. Improvements are needed to create a more welcoming gateway to Lymington town centre and improve its status as a transport hub.

- **Lymington Town Hall** - Given its location and relationship to the Lymington Sports Ground and other amenities, the redevelopment of the Lymington Town Hall site, either in whole or part, provides an opportunity to improve the town centre.
- **Priestlands Gyratory** - Although the Priestlands Place/Stanford Road gyratory has an important traffic management function it is also a gateway to the town centre from the north and the west. Consideration should be given to how it functions as an entrance to the town centre and the potential for improving connectivity.
- **The New Street Community/Cultural area** - The area around New Street has been recommended by the neighbourhood plan Design and Heritage group to become a 'Cultural zone'. It includes the Lymington Centre, St Barbe Museum, and the now largely unused Literary Institute.
- **Woodside Park, Avenue Road Sports Ground and Pennington Sports Ground**
- **The Sea Water Baths** – Connected to the cycle network by Transition Lymington Route 10.
- **Transition Lymington cycle routes** – Four of the Transition Lymington suggested cycle routes run close to Pennington Common, making it a potentially accessible destination within 10-15 minutes from all parts of the town by bike. There may be opportunities to improve signage as well as cycling infrastructure such as secure bike racks close by. On some routes the changes needed to deliver them require not much more than gathering travel survey data and a safety audit of junctions.
- **Communication technology** – Improvements to the infrastructure supporting broadband and 5G connectivity.
- **LCWIP** – Improvements to schemes that will be identified in the New Forest Local Cycling and Walking Infrastructure Plan.

OTHER NON-PLANNING MATTERS

6.5 During the process of preparing the Neighbourhood Plan, there have been many ideas for improving or addressing current problems in the parish that lie outside the scope of the land use planning system to control. The Town Council has noted these issues and will take them forward through its day-to-day business and in partnership with the local community and relevant parties. These include:

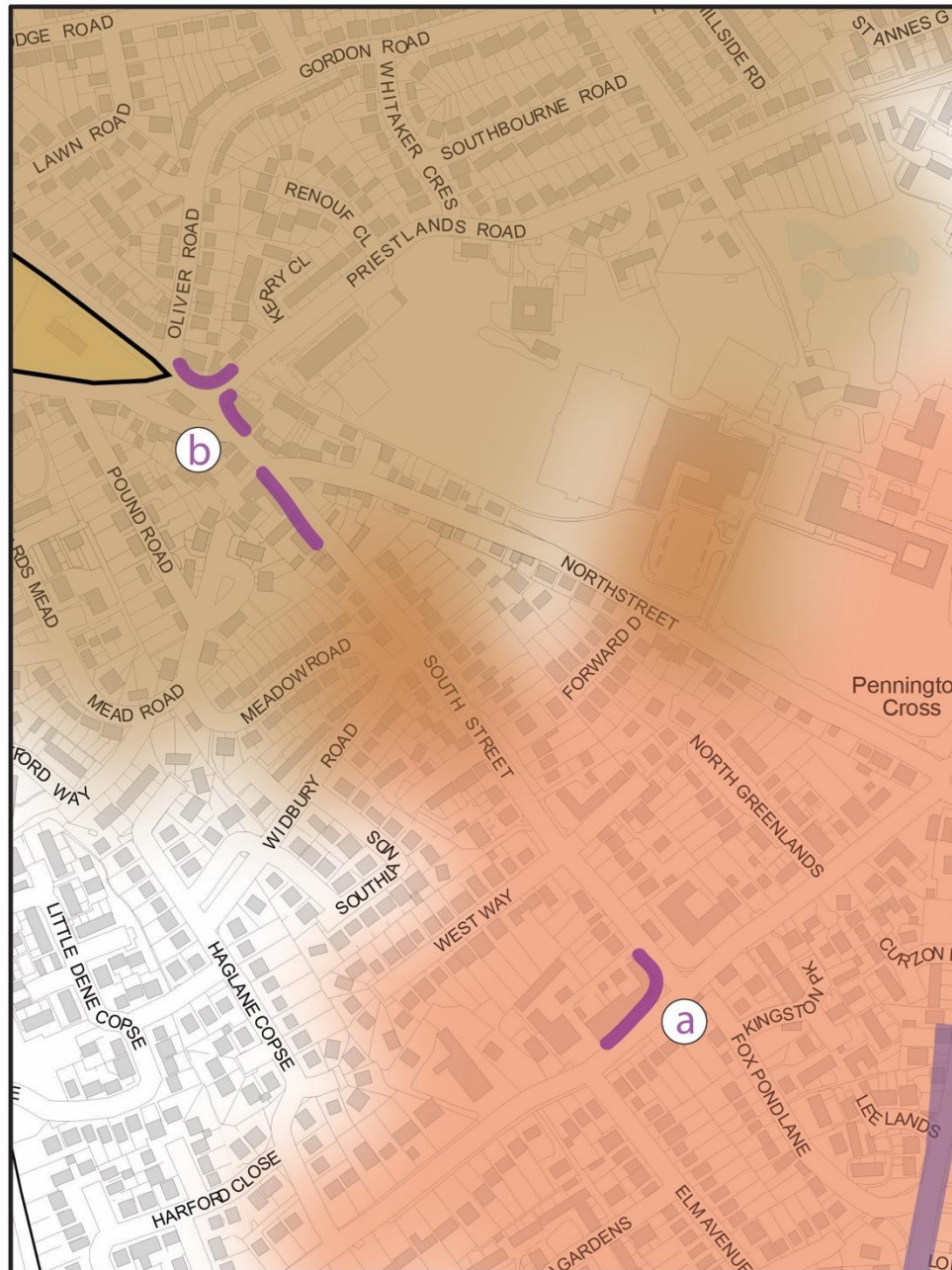
- Other public realm improvement projects including repair of pavements along Bath Road, the area outside the old Post Office and repairs to the Town Quay
- Nature Recovery and Biodiversity Net Gain improvements
- Active travel improvements for non-car users, including walking and cycling routes, pedestrian and cycle friendly zones and Safe Routes to Schools
- Improvements to green the urban environment and street scene through tree planting and wildflower and bulb planting on public and private land including roadside verges
- Reducing mowing regimes to promote biodiversity
- Community activities for younger people
- Community bus
- A continued relationship with NFDC, HCC and local businesses to enhance general maintenance of the town
- Investigating measures to enhance road safety, including 20mph speed limits around schools
- Reviewing parking provision, wayfinding and travelling in, and to, the town



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**Lymington Neighbourhood Plan
Policies Map - October 2025**

- Neighbourhood Area Boundary
- LP1: A Spatial Strategy for the Town**
 - Settlement Boundary
 - Town Centre
 - National Park
 - Green Belt
- LP3: Key Regeneration Sites**
 - a. Bridge Road
 - b. Gosport/Cannon Street
 - c. Town Hall, Avenue Road
 - d. Post Office and BT Site
 - e. Solent Mead
- LP4: Pennington Shopping Parades**
 - a. Fox Pond Shopping Parade
 - b. Pennington Square Shopping Parade
- LP5: Walkable Neighbourhoods**
 - Buckland
 - Woodside
 - Lower Pennington
 - Upper Pennington
- LP9: Safer Lanes Network**
 - Safer Lanes Network



Lymington Neighbourhood Plan Policies Map (Inset 1) - January 2025

LP1: A Spatial Strategy for the Town



Settlement Boundary



National Park

LP4: Pennington Shopping Parades



a. Fox Pond Shopping Parade

b. Pennington Square Shopping Parade

LP5: Walkable Neighbourhoods



Lower Pennington

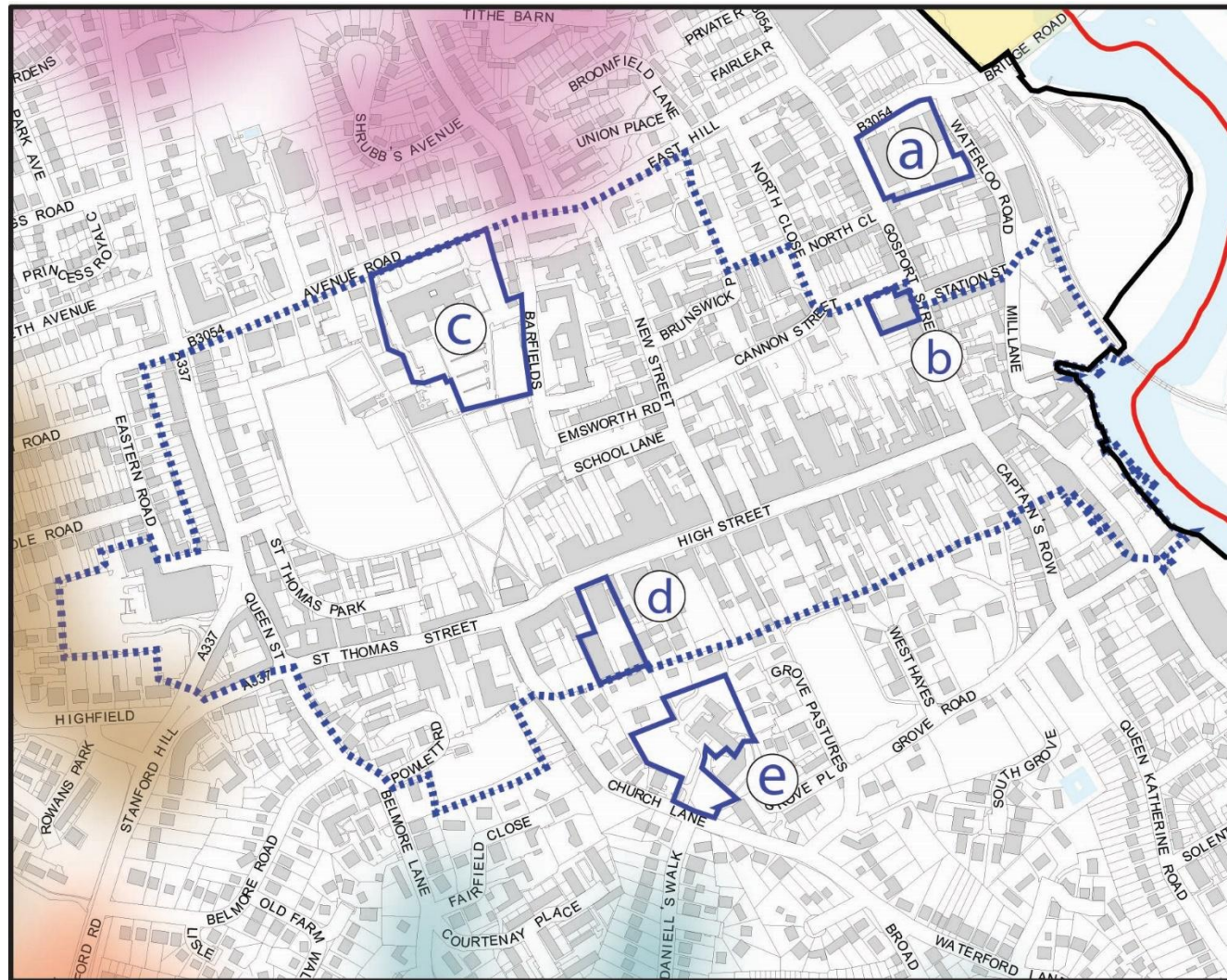


Upper Pennington

LP9: Safer Lanes Network



Safer Lanes Network



Lymington Neighbourhood Plan Policies Map (Inset 2) - October 2025

 Neighbourhood Area Boundary

LP1: A Spatial Strategy for the Town

 Settlement Boundary

 Town Centre

 National Park

LP3: Key Regeneration Sites

 a. Bridge Road
b. Gosport/Cannon Street
c. Town Hall, Avenue Road
d. Post Office and BT Site
e. Solent Mead

LP5: Walkable Neighbourhoods

 Buckland

 Woodside

 Lower Pennington

 Upper Pennington

APPENDIX B – POST OCCUPANCY EVALUATION GUIDANCE

This guidance note sets out how Post-Occupancy Evaluation (POE) should be undertaken and is derived from published guidance and best practice.

1. Post-Occupancy Evaluation (POE) is the method of obtaining feedback on a building's energy performance 'in use', to ensure it measures up to the commitments made by the team that designed and built it. It offers significant potential to address the performance gap and occupant satisfaction.
2. Where a monitoring regime to ensure the 'as designed' building performance targets are achieved in practice for all new and refurbished buildings is required, it is important that data is collected robustly, following good practice POE principles. It is therefore recommended that for residential development the POE methodology in section 11.4 of the Home Quality Mark ONE: Technical Manual: England, Scotland & Wales SD239 (2018)58, or as updated, is used as a guide for meeting this requirement. For non-residential buildings the BSRIA Soft Landings and Design for Performance framework (BG 76/2019), or as updated, may be used.
3. Applicants are required to set out in their Energy Statement how their monitoring regime, based on the HQM, BSRIA or similar methodology, will work in practice and be independently verified by a third party. The Energy Statement to be submitted with the planning application.
4. As each new or refurbished building comes into use, the developer must ensure performance monitoring and data collection for all relevant parameters for one whole year is carried out once the building is substantially occupied, in line with good POE practice for residential or non-residential uses. This verification process should entail, after appropriate commissioning has taken place, comparison of the 'as designed' parameters (energy, carbon, air quality and overheating risk) to monitoring data under the same categories, to assess and compare actual performance.
5. In order to account for seasonality, a minimum of 12 months monitoring data is required. On the other hand, to account for actual weather, the modelling results can be adjusted with degree days for the relevant year. A 'performance gap metric', which will compare designed and actual performance (e.g. a percentage difference) for each of the 4 required parameters (energy, carbon, air quality and overheating risk) should be issued at POE stage. This needs to be issued for both the 'central' scenario and the 'lowest acceptable performance /reasonable worst-case scenario' as a minimum, with multiple scenarios considered if at all possible. The process and reporting methodology used for the POE will need to be repeatable, so that performance can be monitored for at least 2 annual space heating cycles.
6. A report will then be required to be submitted to both building owners/occupiers and to Council, which states the performance gap metric and identifies any reasons for deviation from predicted energy usage, carbon emissions, indoor air quality and overheating

performance, as well as recommendations for reasonable corrective action that will be taken to reduce or eliminate the performance gap.

7. The submission of the monitoring report to owners/occupiers and the council must be secured by planning condition, to be determined at the time of application based on case-specific factors. The applicant must demonstrate that the reasonable corrective actions committed to in the monitoring report, and subsequently agreed by Buckinghamshire Council, have been implemented through another annual heat cycle before the condition will be discharged.



Report on the Lymington and Pennington Neighbourhood Plan 2016 – 2036

An Examination undertaken for the New Forest District Council and the New Forest National Park Authority with the support of the Lymington and Pennington Town Council on the February 2025 version of the submitted Plan.

Independent Examiner: Andrew Mead BSc (Hons) MRTPI MIQ

Date of Report: 25 September 2025

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Main Findings - Executive Summary

From my examination of the Lymington and Pennington Neighbourhood Plan (LPNP/the Plan) and its supporting documentation including the representations made, I have concluded that subject to the policy modifications set out in this report, the Plan meets the Basic Conditions.

I have also concluded that:

- The Plan has been prepared and submitted for examination by a qualifying body – the Lymington and Pennington Town Council (LPTC);
- The Plan has been prepared for an area properly designated – the Lymington and Pennington Neighbourhood Area as shown on Plan A on page 4 of the Neighbourhood Plan;
- The Plan specifies the period during which it is to take effect: 2016 - 2036; and
- The policies relate to the development and use of land for a designated neighbourhood area.

I recommend that the Plan, once modified, proceeds to referendum on the basis that it has met all the relevant legal requirements.

I have considered whether the referendum area should extend beyond the designated area to which the Plan relates and have concluded that it should not.

1. Introduction and Background

Lymington and Pennington Neighbourhood Plan 2016–2036

- 1.1 Lymington, a historic market and harbour town, lies on the south coast of the New Forest where the Lymington River flows into the Solent. The A337 is the main road into Lymington from Lyndhurst (14 km to the north) and the A31/M27 a further 7 km to the north. Bournemouth lies about 30 km to the west. Lymington is also a ferry port for the Isle of Wight (Yarmouth). The Plan area includes land within the New Forest National Park. In 2021, the population of the Town Council area was 14,858.¹
- 1.2 The preparation of the Lymington and Pennington Neighbourhood Plan (LPNP) began in 2015 and in 2016 a Steering Group was formed. Led by the Steering Group, evidence was collected, consultations were carried out and the final version of the Plan was submitted to the New Forest District Council (NFDC) and the New Forest National Park Authority (NFNPA) in March 2025.

¹ 2021 Census.

The Independent Examiner

- 1.3 As the Plan has now reached the examination stage, I have been appointed as the examiner of the LPNP by the NFDC and the NFNPA with the agreement of the Lymington and Pennington Town Council (LPTC).
- 1.4 I am a chartered town planner and former government Planning Inspector and have experience of examining neighbourhood plans. I am an independent examiner, and do not have an interest in any of the land that may be affected by the Plan.

The Scope of the Examination

- 1.5 As the independent examiner, I am required to produce this report and recommend either:
- (a) that the neighbourhood plan is submitted to a referendum without changes; or
 - (b) that modifications are made and that the modified neighbourhood plan is submitted to a referendum; or
 - (c) that the neighbourhood plan does not proceed to a referendum on the basis that it does not meet the necessary legal requirements.
- 1.6 The scope of the examination is set out in Paragraph 8(1) of Schedule 4B to the Town and Country Planning Act 1990 (as amended) ('the 1990 Act'). The examiner must consider:
- Whether the plan meets the Basic Conditions.
 - Whether the plan complies with provisions under s.38A and s.38B of the Planning and Compulsory Purchase Act 2004 (as amended) ('the 2004 Act'). These are:
 - it has been prepared and submitted for examination by a qualifying body, for an area that has been properly designated by the local planning authority;
 - it sets out policies in relation to the development and use of land;
 - it specifies the period during which it has effect;
 - it does not include provisions and policies for 'excluded development'; and
 - it is the only neighbourhood plan for the area and does not relate to land outside the designated neighbourhood area.
 - Whether the referendum boundary should be extended beyond the designated area, should the plan proceed to referendum.

- Such matters as prescribed in the Neighbourhood Planning (General) Regulations 2012 (as amended) ('the 2012 Regulations').
- 1.7 I have considered only matters that fall within Paragraph 8(1) of Schedule 4B to the 1990 Act, with one exception. That is the requirement that the Plan is compatible with the Human Rights Convention.

The Basic Conditions

- 1.8 The 'Basic Conditions' are set out in Paragraph 8(2) of Schedule 4B to the 1990 Act. In order to meet the Basic Conditions, the neighbourhood plan must:
- have regard to national policies and advice contained in guidance issued by the Secretary of State;
 - contribute to the achievement of sustainable development;
 - be in general conformity with the strategic policies of the development plan for the area;
 - be compatible with and not breach European Union (EU) obligations (under retained EU law)²; and
 - meet prescribed conditions and comply with prescribed matters.
- 1.9 Regulation 32 of the 2012 Regulations prescribes a further Basic Condition for a neighbourhood plan. This requires that the making of the Plan does not breach the requirement of Chapter 8 of Part 6 of the Conservation of Habitats and Species Regulations 2017.³

2. Approach to the Examination

Planning Policy Context

- 2.1 The current Development Plan for the Lymington and Pennington Area, excluding policies relating to minerals and waste development, principally includes:
- the New Forest District Core Strategy (2009);
 - the New Forest District Local Plan Part 2 (2014);
 - the New Forest District Local Plan Part 1 (2020); and
 - the New Forest National Park Local Plan (2016-2036).

In addition, Policy DW-E12 (Protection of Landscape Features) is saved from the New Forest District Plan First Alteration (2005). The Basic

² The existing body of environmental regulation is retained in UK law.

³ This revised Basic Condition came into force on 28 December 2018 through the Conservation of Habitats and Species and Planning (Various Amendments) (England and Wales) Regulations 2018.

Conditions Statement helpfully includes in Table B an assessment of general conformity with the strategic policies of the main four planning documents which comprise the Development Plan for the area. The NFDC and NFNPA Local Plans are being reviewed but they are at a very early stage in their preparation.

- 2.2 The planning policy for England is set out principally in the National Planning Policy Framework (NPPF). In addition, the Planning Practice Guidance (PPG) offers advice on how the NPPF should be implemented. It should be noted that the latest iteration of the NPPF was published on 12 December 2024. However, paragraph 239 of that version includes transitional arrangements for neighbourhood plans, stating that the revised NPPF only applies to neighbourhood plans submitted after 12 March 2025. As the Plan was submitted to NFDC and the NFNPA on 7 March 2025, all references in this report read across to the earlier December 2023 NPPF.

Submitted Documents

- 2.3 I have considered all policy, guidance and other reference documents I consider relevant to the examination, as well as those submitted which include:
- the draft Lymington and Pennington Neighbourhood Plan 2016 – 2036 (February 2025);
 - Appendix A of the Plan: Vision for the Town Centre (January 2025);
 - Appendix C of the Plan: Lymington Local Distinctiveness Supplementary Planning Document (SPD)(February 2011);
 - Map A on page 4 of the Plan which identifies the area to which the proposed Neighbourhood Plan relates;
 - the Consultation Statement (February 2025) and Appendices A – F;
 - the Basic Conditions Statement (February 2025);
 - the Screening Statement on the determination of the need for a Strategic Environmental Assessment (SEA)/Habitats Regulation Assessment: New Forest District Council (February 2017);
 - the Screening Statement on the determination of the need for a Strategic Environmental Assessment (SEA)/Habitats Regulation Assessment: New Forest National Park Authority (March 2017);
 - the Sustainability Appraisal (SA) (July 2024);
 - the Habitats Regulations Assessment (HRA) (June 2024) and update (February 2025);
 - all the representations that have been made in accordance with the Regulation 16 consultation; and
 - the responses received on 14 August 2025 from LPTC and on 19 August 2025 from NFDC to the questions of clarification in my letter of 7 July 2025.⁴

⁴ View at: <https://newforest.gov.uk/lymingtonandpenningtonplan>

Site Visit

- 2.4 I made an unaccompanied site inspection to the LPNP Area on 20 August 2025 to familiarise myself with it and visit relevant locations referenced in the Plan and evidential documents.

Written Representations with or without Public Hearing

- 2.5 This examination has been dealt with by written representations. I considered a hearing session was not necessary, as the consultation responses clearly articulated the objections to the Plan and presented arguments for and against the Plan's suitability to proceed to a referendum. No requests for a hearing were received.

Modifications

- 2.6 Where necessary, I have recommended modifications to the Plan (**PMs**) in this report in order that it meets the Basic Conditions and other legal requirements. For ease of reference, I have listed these modifications separately in the Appendix to this report.

3. Procedural Compliance and Human Rights

Qualifying Body and Neighbourhood Plan Area

- 3.1 The LPNP has been prepared and submitted for examination by the LPTC, which is a qualifying body. The LPNP extends over all the area designated by the New Forest District Council on 1 October 2015 and the New Forest National Park Authority on 15 September 2015. I am satisfied it is the only Neighbourhood Plan for the Lymington and Pennington Area and does not relate to any land outside the designated Neighbourhood Plan Area.

Plan Period

- 3.2 The Plan period is from 2016 to 2036 as clearly stated on the front cover.

Neighbourhood Development Plan Preparation and Consultation

- 3.3 The Consultation Statement (CS), as illustrated in the comprehensive dateline on pages 4-6 of the CS, describes the thorough preparation of the Plan with involvement of the public and various stakeholders at the stages of the process. A Steering Group was formed in 2016 early in the preparation process of the Plan which then also set up six working groups for various aspects of the Plan. The collection of the evidence for the Plan included informal public consultations in 2017 and 2023. Methods of communication included the LPNP web site, press articles, posters, social media, public exhibitions, stakeholder consultations and public meetings.

- 3.4 The pre-submission Plan was published for consultation under Regulation 14 of the 2012 Regulations from 7 August 2024 until 9 October 2024. An overview of the analysis of comments made by the NFDC, the NFNPA, statutory consultees and members of the public are summarised in Appendix D of the CS, together with the responses of the LPTC in Appendices E and F and any resulting changes to the Plan.
- 3.5 The final version of the Plan was submitted to the NFDC and the NFNPA on 7 March 2025. Consultation in accordance with Regulation 16 was carried out from 18 April 2025 until 30 May 2025. 25 responses were received about the Plan, including those from NFDC. I am satisfied that a transparent, fair and inclusive consultation process has been followed for the LPNP, that has had regard to advice in the PPG on plan preparation and engagement and is procedurally compliant in accordance with the legal requirements.

Development and Use of Land

- 3.6 The Plan sets out policies in relation to the development and use of land in accordance with s.38A of the 2004 Act.

Excluded Development

- 3.7 The Plan does not include provisions and policies for 'excluded development'.⁵

Human Rights

- 3.8 The Basic Conditions Statement (BCS) notes that the LPTC has been mindful of the fundamental rights and freedoms guaranteed under the European Convention on Human Rights in the process of preparing the Neighbourhood Plan and considers that it complies with the Human Rights Act. The Neighbourhood Plan has been subject to extensive engagement with those people local to the area who could be affected by its policies and their views have been taken into account in finalising the Plan. I am aware from the CS that considerable emphasis was placed throughout the consultation process to ensure that no sections of the community were isolated or excluded. I have considered this matter independently and I am satisfied that the policies will not have a discriminatory impact on any particular group of individuals.

⁵ See section 61K of the 1990 Act.

4. Compliance with the Basic Conditions

EU Obligations

- 4.1 A Sustainability Appraisal (SA) was prepared for the Plan. Following an appraisal of the policies, the SA concluded that no significantly negative effects were identified, but that many positive effects would occur, mostly due to the emphasis on brownfield regeneration.
- 4.2 The Plan was also subject to Habitats Regulations Assessment (HRA). The Habitats Sites considered within this report were: the New Forest Special Area of Conservation (SAC), Special Protection Area (SPA) and Ramsar; the Solent Maritime SAC; the Solent and Southampton Water SPA and Ramsar; the Avon Valley SPA and Ramsar; the River Avon SAC; and the Solent and Isle of Wight Lagoons SAC. The Screening for Likely Significant Effects (LSEs) were considered using impact pathways including loss of functionally linked land, recreational pressure, air pollution and water quality.
- 4.3 Overall, it was concluded that the LPNP will not result in any LSEs on Habitats Sites in relation to the identified impact pathways, both alone and in-combination. This is because the LPNP does not make specific allocations or propose quanta of growth. With the current policies included in the LPNP, it was concluded that there was no requirement for undertaking an Appropriate Assessment (AA). Nevertheless, the HRA recommended that Policy LP3 (Key Regeneration Opportunities in the Town Centre) included a reference to the need for developers to provide adequate funding in line with the requirements set out in the Bird Aware Solent and the New Forest Revised Habitat Mitigation Scheme Supplementary Planning Document. The statutory consultees did not dissent from these conclusions.
- 4.4 Having read the SA and HRA related documentation and other information provided and, having considered the matter independently, I agree with the conclusions. Therefore, I am satisfied that the LPNP is compatible with EU obligations as retained in UK law.

Main Issues

- 4.5 Having considered whether the Plan complies with various procedural and legal requirements, it is now necessary to deal with whether it complies with the remaining Basic Conditions, particularly the regard it pays to national policy and guidance, the contribution it makes to the achievement of sustainable development and whether it is in general conformity with strategic development plan policies. I test the Plan against the Basic Conditions by considering specific issues of compliance of all the Plan's policies.
- 4.6 As part of that assessment, I consider whether the policies are sufficiently clear and unambiguous, having regard to advice in the PPG. A

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neighbourhood plan policy should be drafted with sufficient clarity that a decision maker can apply it consistently and with confidence when determining planning applications. It should be concise, precise and supported by appropriate evidence.⁶

- 4.7 Accordingly, having regard to the Lymington and Pennington Neighbourhood Plan, the consultation responses, other evidence and the site visit, I consider that the main issues in this examination are whether the LPNP policies (i) have regard to national policy and guidance; (ii) are in general conformity with the adopted strategic planning policies; and (iii) would contribute to the achievement of sustainable development?

Vision and Objectives

- 4.8 The vision for the LPNP is based on issues raised by the community during the initial stages of the consultation process. The succinct vision is described on page 20 of the Plan followed by seven broad objectives which are then used to help to achieve the vision, and which form the basis for the thirteen specific land use based policies.

Policy LP1: A Spatial Strategy For The Town

Policy LP2: Lymington Town Centre

Policy LP3: Key Regeneration Opportunities In The Town Centre

- 4.9 I have considered Policies LP1, LP2 and LP3 together because of their interaction. Policy LP1 sets out the strategy of reusing brownfield land in Lymington Town Centre for suitable development opportunities, Policy LP2 refines the strategy to a more local level describing the vision for the town centre and Policy LP3 identifies five key regeneration sites within the town centre.
- 4.10 The focus on “brownfield first”, using other suitable development opportunities within the settlement boundary and the gentle densification within the town, is seen as the means of accommodating housing needs whilst protecting the National Park landscape around the town and preventing inappropriate development in the adjoining Green Belt. The comprehensive explanation of Policy LP1 is given in paragraphs 5.4 and 5.5 of the Plan. The policy has regard to national guidance⁷, generally conform with Policies STR1, STR2, STR3, STR4 and ENV2 of the New Forest District Local Plan (NFDLP) Part 1; Policies SP1, SP3 and SP4 of the New Forest National Park Local Plan (NFNPLP) and meets the Basic Conditions.
- 4.11 The Lymington Town Centre Vision is described in Appendix A with the accompanying Town Centre Spatial Framework outlined on Map H of the Plan. Policy LP2 supports proposals for redevelopment provided they demonstrate how they will contribute to the Town Centre Vision. Clause C

⁶ PPG Reference ID: 41-041-20140306.

⁷ NPPF: paragraphs 90, 123, 152 and 182.

of the policy requires development proposals to make a direct and proportionate contribution to projects and town centre improvements which would deliver the objectives of the Town Centre Vision. However, although contributions sought may be appropriate in scale, nature and location, they must make the development acceptable in planning terms and be directly related to the development.⁸ Therefore, I shall recommend a modification to the policy to ensure that it has regard to national guidance.⁹ **(PM1)** The policy would then also generally conform with Policy ECON5 and IMPL1 of the NFDLP Part 1 and meet the Basic Conditions.

- 4.12 NFDLP Part 1 Policy STR5 sets an overall housing target 2016 – 2036 for the District, which includes at Clause ii. b. around 200 homes on sites to be identified at Lymington and Pennington. LPNP Policy LP3 identifies five key regeneration sites in the Town Centre where redevelopment in the form of mixed uses, including housing, will be encouraged provided they contribute to the Town Centre Vision. The five sites are: a. Bridge Road; b. Gosport/Cannon Street; c. Town Hall, Avenue Road; d. Post Office and BT Site; and e. Solent Mead. The policy dovetails with the strategy outlined in Policy LP1 of prioritising brownfield redevelopment ahead of development in the Green Belt or other countryside.
- 4.13 NFDC concede that it is unclear that the sites will by themselves achieve a combined residential capacity of 200 homes, but there have been two large windfall sites permitted giving a net gain of 72 dwellings since the Local Plan was adopted in 2020. NFDC appear broadly satisfied that Policy LP3 is sufficient to enable the strategic functions for housing for Lymington and Pennington set out in NFDLP Part 1 Policy STR5 to be met. I have no reason to question that judgement. The housing capacities of the regeneration sites have not been defined, and representations claimed that greater precision was necessary. However, considering the flexibility required for viability and design, I believe the stance in Policy LP3 is entirely reasonable.
- 4.14 The HRA recommended that the policy includes references to the strategic requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD and nutrient neutrality which has been incorporated in the final sentence. NFDC has asked that a reference is made to air quality monitoring and this I shall recommend. NFDC also indicated that the Solent Mead regeneration site boundary should be amended to take into account the NFDC ownership of some of the land. I shall recommend the adjustment. **(PM2)** Policy LP3 would then have regard to national guidance¹⁰, would generally conform with Policy STR5 of the NFDLP Part 1 and would meet the Basic Conditions.

⁸ NPPF: paragraph 57.

⁹ NPPF: paragraphs 57 and 90 a).

¹⁰ NPPF: paragraphs 8 b), 63, 64 b) and 124 c),

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- 4.15 Representations sought the allocation of sites for housing on land north of Torreyanna Gardens, Pennington; the Boat Building Factory, Waterloo Road; and the former Edgards Dairy Yard, Pennington. However, I consider that the Plan generally conforms with the strategic policies of the Local Plan and so I am not required to identify further land for housing. In any event, I accept the reasons advanced by LPTC for not allocating those sites.¹¹

Policy LP4: Pennington Shopping Parades

- 4.16 Policy LP4 defines Local Shopping Frontages at Milford Road and South Street, and Pennington Square and South Street as shown on the Policies Map (Inset 1). The aim of the policy is to prevent the loss of uses on ground floors within the Local Shopping Frontages which meet the day-to-day needs of the local community. I can understand that a use which meets “day-to-day” needs may lack the standard precision for development management and that some uses may be lost through permitted development. Nevertheless, I support the aim behind the policy and should a proposal be made for a change of use which would erode the convenience shopping opportunities within a Local Shopping Frontage, I consider that it should be possible for planning permission to be refused for that reason. The additions to paragraph 5.15 of the Plan suggested by NFDL and to paragraph 5.17 suggested by LPTC, both of which I shall recommend, would enhance and provide the necessary clarity to the implementation of the policy. **(PM3)** With this recommended modification, the policy will have regard to national policy¹², generally conforms with Policy ECON6 of the NFDLP Part 1 and meets the Basic Conditions.

Policy LP5: Walkable Neighbourhoods

- 4.17 Policy LP5 Clause A identifies broad locations at Buckland, Woodside, Lower Pennington and Upper Pennington as Walkable Neighbourhoods which are primarily residential areas located more than a 800m walk from Lymington Town Centre. Policy LP5 Clauses B – F then explain how the policy will be implemented. Clauses C, D, E and F refer to uses defined in Clause B which does not define any uses. LPTC has suggested amendments to the policy which would correct that error and which I shall recommend. With one other exception, I consider that the policy has regard to national guidance¹³ and generally conforms with Policies ECON5 and ECON6 of the NFDLP Part 1. The exception is the use of the term “established” use in Clause F which has legal connotations. Therefore, I shall recommend the deletion of that word which would mean the policy would then meet the Basic Conditions. **(PM4)**

¹¹ Response from LPTC to my question Q3.

¹² NPPF: paragraphs 97 a) and 97 d).

¹³ NPPF: paragraphs 97 a) and 108 c).

Policy LP6: High Quality Design

- 4.18 Policy LP6 aims to achieve high quality design in new development that contributes positively to local distinctiveness, the quality of life and enhances the character and appearance of the locality. The policy has regard to national policy¹⁴, generally conforms with Policies STR1 and ENV3 of the NFDLP Part 1, Policy DP18 of the NFNPLP and meets the Basic Conditions. However, paragraph 5.20 states that the Lymington Local Distinctiveness Supplementary Planning Document (SPD) carries the full weight of the Development Plan in decision making and is not subordinate or supplementary guidance carrying lesser weight. The NPPF states that Supplementary Planning Documents are capable of being a material consideration in planning decisions but are not part of the Development Plan.¹⁵ Therefore, even though the SPD was Appendix C of the Plan and part of the consultation process, it was appended to the Plan and does not form part of the Development Plan. Accordingly, I shall recommend the deletion of the final sentence in paragraph 5.20 and the substitution of an alternative. **(PM5)**

Policy LP7: Providing A Balanced Mix Of Dwellings To Meet Local Needs

- 4.19 Policy LP7 aims to provide a balanced mix of dwellings to meet local needs. Clause B states that the number of small dwellings should be greater than 50% of the total in schemes of 5 or more dwellings. I note the concern expressed by NFDC about deliverability on smaller sites and I shall recommend the inclusion of a viability test as in Policy HOU1 of the NFDLP Part 1. **(PM6)** The policy would then have regard to national policy¹⁶, would generally conform with Policy HOU1 of the NFDLP Part 1, Policy SP1 of the NFNPLP and would meet the Basic Conditions.

Policy LP8: Green Infrastructure And Nature Recovery Network

- 4.20 Policy LP8 designates a Green Infrastructure and Nature Recovery Network. Clause C provides that all development should embed Green Infrastructure in a way that helps to support nature recovery, whereas I shall recommend that the policy should apply to appropriate development, which is more reasonable and realistic. **(PM7)** Policy LP8 would then have regard to national policy¹⁷, would generally conform with Policies STR1 and ENV4 of the NFDLP Part 1, Policy DM9 of the NFDLP Part 2, Policy SP6 of the NFNPLP and would meet the Basic Conditions.

Policy LP9: Safer Lanes Network

- 4.21 Policy LP9 identifies a Safer Lane Network in order to protect the rural and historic characteristics of the lanes and promote the lanes as shared

¹⁴ NPPF: paragraph 132.

¹⁵ NPPF: Annex 2 Glossary.

¹⁶ NPPF: paragraphs 8 b) and 64 b).

¹⁷ NPPF: paragraphs 96 c) and 180.

spaces. Policy LP9 has regard to national policy¹⁸, generally conforms with Policies STR1 and ENV4 of the NFDLP Part 1, Policy DM9 of the NFDLP Part 2, Policy SP55 of the NFNPLP and meets the Basic Conditions.

Policy LP10: Active And Healthy Travel

- 4.22 Policy LP10 supports measures to encourage active and healthy travel in the Plan area. Policy LP10 has regard to national policy¹⁹, generally conforms with Policies CCC1 and CCC2 of the NFDLP Part 1, Policy SP55 of the NFNPLP and meets the Basic Conditions.

Policy LP11: Net Zero Carbon Building Design

- 4.23 Policy LP11 is aimed at encouraging efficient energy performance in new development, with paragraphs 5.54 to 5.60 of the Plan offering a clear explanation of the reasoning behind each of the five Clauses of the policy. In general, with some focussed modifications and noting the comprehensive reply from LPTC to my questions, the policy has regard to national guidance²⁰, generally conforms with Policies ENV3 and IMPL2 of the NFDLP Part 1, Policies SP1 and SP11 of the NFNPLP and meets the Basic Conditions.
- 4.24 However, a significant exception is within Clause C, which introduces Post Occupancy Evaluation (POE) an explanation of which is in paragraph 5.56 of the Plan and Appendix B. The basis of POE is that a condition would be imposed on certain planning permissions to require a report to be submitted showing any gap in performance between the predicted energy consumption at the design stage and actual energy consumption when the building is occupied. The planning condition would only be discharged when any performance gap had been rectified.
- 4.25 I accept that the POE would not set energy efficiency standards and would only incentivise designers and developers to conform with the standards, such as Passivhaus, so that the POE could be avoided, but I note the comments by NFDC that monitoring charges for compliance checking has been introduced by the Council. Therefore, the additional POE costs would fall on the developers and affect either the viability of a scheme or have a consequent impact on property prices. The additional costs would be exacerbated were there to be any disputes between the main parties.
- 4.26 Even though the court of appeal judgement *R(Rights: Community: Action Ltd) v SoS HCLG [2025] EWCA Civ 990* found that the Written Ministerial Statement (WMS) of December 2023 is not a legal barrier for setting higher energy efficiency standards in Development Plan Documents than advised in Building Regulations, I consider that the effect on viability is a significant criticism of implementing POE via a planning condition. Perhaps

¹⁸ NPPF: paragraph 180.

¹⁹ NPPF: paragraphs 108 c).

²⁰ NPPF: paragraphs 8 c) and 159 b).

some form of self-certification is possible, but that would fall outside land use based policies of the Neighbourhood Plan. Therefore, notwithstanding whether the planning condition seeking POE meets the six tests set out in paragraph 56 of the NPPF, I shall recommend the deletion of the relevant section of Clause C and consequent modifications to Clause B. I shall also recommend a modification to Clause A so that it does not apply to householder applications. **(PM8)** With the recommended modifications, Policy LP11 would meet the Basic Conditions.

- 4.27 I note NFDC's response to my question 8 advises, with reference to implementing Policy R10 of the Ringwood Neighbourhood Plan (which is very similar to Policy LP11 of this Plan), that "...NFDC is starting to acknowledge with regards to R10 that there is conflict with wider policy and having to weigh this in the balance, considering the development plan and national framework as a whole".²¹ However, I have no substantiating evidence to identify which Clauses of Policy R10 (Ringwood Neighbourhood Plan) or LP11 of this Neighbourhood Plan cause concern.

Policy LP12: Urban Greening And Canopy Cover

- 4.28 Policy LP12 aims to maximise urban greening and tree canopy cover. The policy has regard to national guidance²², generally conforms with Policies STR1, ENV3 and ENV4 of the NFDLP Part 1, Policy DM9 of the NFDLP Part 2, Policy SP6 of the NFNPLP and meets the Basic Conditions.

Policy LP13: Digital Communication Infrastructure

- 4.29 Policy LP13 seeks to encourage the provision of new digital communications infrastructure. This policy also has regard to national guidance²³, generally conforms with Policy STR8 of the NFDLP Part 1 and meets the Basic Conditions.

Local Infrastructure Improvements And Other Non-Planning Matters

- 4.30 The Plan includes a section (paragraph 6.4) on priorities for local infrastructure improvements when appropriate funding is received by the local planning authority. In addition, paragraph 6.5 lists other various non planning matters as actions to be taken or issues to be addressed which cannot be delivered through land-use planning policies. These are not considered as part of the examination and will not form part of the statutory Development Plan. Nevertheless, they represent aspirations or actions which would benefit the community and demonstrate one of the valuable associated attributes of the neighbourhood planning process.²⁴

²¹ See response from NFDC dated July 18 2025.

²² NPPF: paragraph 159 a).

²³ NPPF: paragraph 118.

²⁴ PPG Reference ID: 41-004-20190509.

Overview

- 4.31 Therefore, on the evidence before me, with the recommended modifications, I consider that the policies within the LPNP are in general conformity with the strategic policies of the Development Plan, have regard to national guidance, would contribute to the achievement of sustainable development and so would meet the Basic Conditions.
- 4.32 A consequence of the acceptance of the recommended modifications would be that amendments will have to be made to the explanation within the Plan in order to make it logical and suitable for the referendum. Further minor amendments might also include incorporating factual updates, correcting inaccuracies, typographical and punctuation errors, any text improvements suggested by NFDC in their Regulation 16 or Regulation 14 consultation responses and any other similar minor or consequential changes in agreement with the NFDC and the NFNPA. None of these alterations would affect the ability of the Plan to meet the Basic Conditions and could be undertaken as minor, non-material changes.²⁵

5. Conclusions

Summary

- 5.1 The Lymington and Pennington Neighbourhood Plan has been duly prepared in compliance with the procedural requirements. My examination has investigated whether the Plan meets the Basic Conditions and other legal requirements for neighbourhood plans. I have had regard to all the responses made following consultation on the LPNP, and the evidence documents submitted with it.
- 5.2 I have recommended eight modifications to ensure the Plan meets the Basic Conditions and other legal requirements. I recommend that the Plan, once modified, proceeds to referendum.

The Referendum and its Area

- 5.3 I have considered whether the referendum area should be extended beyond the designated area to which the Plan relates. The LPNP, as modified, has no policy which I consider significant enough to have an impact beyond the designated Neighbourhood Plan boundary, requiring the referendum to extend to areas beyond the Plan boundary. I recommend that the boundary for the purposes of any future referendum on the Plan should be that of the designated Neighbourhood Plan Area.

²⁵ PPG Reference ID: 41-106-20190509.

Concluding Comments

- 5.4 The LPTC, the Neighbourhood Plan Steering Group and other voluntary contributors are to be commended for producing a succinct and comprehensive Plan. The Plan is logically presented, informative and extremely well illustrated. The Consultation Statement and the Basic Conditions Statement were concise and very useful. The Plan also benefitted from the constructive comments from the considered responses from the LPTC and NFDC to my questions. Subject to the recommended modifications, the LPNP will make a positive contribution to the Development Plan for the area and should enable the extremely attractive character and appearance of Lymington and Pennington to be maintained whilst enabling sustainable development to proceed.

Andrew Mead

Examiner

Appendix: Modifications

Proposed modification no. (PM)	Page no./ other reference	Modification
PM1	Policy LP2	Amend Clause C by the addition of: "... Town Centre Vision, provided the contributions make the proposals acceptable in planning terms and are directly related to the development."
PM2	Policy LP3	Amend the final paragraph to: "For the avoidance of doubt, strategic policy requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD, NFDC air quality monitoring and nutrient neutrality will continue to apply." Amend the boundary for site e) on the Policies Map (Inset 2) to match the Hampshire County Council ownership as shown on the map submitted at paragraph 1.11 of the NFDC response to examiner's questions dated 18 July 2025. Rephrase the final sentence of paragraph 5.11 of the Plan to: "The Solent Mead site is in split ownership between Hampshire County Council (HCC) and NFDC. A decision was made by HCC in 2025 to close its part of the site and it is therefore likely that that part of the site will become available for development during the Plan period. The NFDC housing on the site will remain."
PM3	Policy LP4	Amend paragraph 5.15 of the Plan by the inclusion of the following third sentence: "This approach aims to ensure that residents can access day to day services and amenities, for example, convenience shops, education and healthcare facilities." Amend paragraph 5.17 of the Plan by the inclusion of a new penultimate sentence: "Uses which are considered to meet day-to-day needs include Class E(a)"

		convenience food retail for up to a total of 500 sq.m of net internal retail floorspace, Class E(b) café, Class E(d) indoor sport and recreation, Class E(e) medical services, Class E(f) day centre or nursery, Class F1 learning and non-residential institution; and/or a Class F2 local community use of an appropriate scale."
PM4	Policy LP5	Amend Clause C to: "Proposals including uses which are intended to meet the local communities' day to day needs may be delivered as ground floor units in a scheme with housing on upper floors ..." Amend the second sentence of Clause D to: "Within this context, clustering of uses intended to meet day-to-day community needs in each broad location is preferred." Amend Clause E to: "Proposals including uses which are intended to meet the local communities' day-to-day needs must demonstrate that the site is located and accessible by walking, ..." Amend Clause F to: "Proposals to change the use of land or premises in a walkable community from a use which contributes to meeting the local communities' day-to-day needs to another use will not be supported."
PM5	Paragraph 5.20	Delete the final sentence and substitute: "LTC will seek to work with NFDC and local community groups in the preparation of a District wide Design Code which is intended to retain the emphasis on local distinctiveness. The Code will be consulted upon as part of a separate process in due course."
PM6	Policy LP7	Add the following phrase to the end of Clause B: "... taking into account the viability of the scheme."

PM7	Policy LP8	Amend Clause C to: "All appropriate development should embed Green Infrastructure ..."
PM8	Policy LP11	Amend Clause A to: "All development (except for householder development) should be "zero carbon ready" ...". Amend Clause B to: "Where feasible, buildings should aim to be certified to a Passivhaus or equivalent standard with a space heating demand of less than 15KWh/m2/year." Amend Clause C to: "All planning applications for new or refurbished buildings should include a demonstration to show that their energy efficiency has been tested to ensure that the buildings will perform as predicted at the design stage."



Lymington and Pennington Neighbourhood Plan

Decision Statement

October 2025

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Introduction

- 1.1. New Forest District Council has a statutory duty to assist local communities in the preparation of neighbourhood plans. As the planning authority for the area outside the National Park, the council is also required to support draft neighbourhood plans through the Examination process towards local Referendum.
- 1.2. The draft Lymington and Pennington Neighbourhood Plan was submitted for independent Examination on 13th June 2025 and the Examiner's Report was issued on 25th September 2025. Under the requirements of the Neighbourhood Planning (General) Regulations 2012 (as amended), the District Council must: (i) decide what action to take in response to each recommendation made in the Examiner's Report; and (ii) publish their decision and the reasons for it in a 'Decision Statement'.
- 1.3. This statement confirms that the modifications proposed by the Examiner's report have been accepted by the district council and the draft Lymington and Pennington Neighbourhood Plan has been modified as a result. Therefore the Plan may now proceed to referendum.

Background

- 1.4. The Lymington and Pennington Neighbourhood Plan relates to the area that was designated by New Forest District Council and New Forest National Park Authority in October 2015. This 'Neighbourhood Area' corresponds with the Lymington and Pennington Parish boundary and includes land within the administration of both New Forest District Council and New Forest National Park Authority as local planning authorities.
- 1.5. Following the submission of the draft Lymington and Pennington Neighbourhood Plan to New Forest District Council and the National Park Authority, the Plan was publicised and representations were invited for a 6-week period, closing at the end of May 2025.

- 1.6. Mr Andrew Mead BSc (Hons) MRTPI MIQ was appointed by New Forest District Council and New Forest National Park Authority – with the agreement of Lymington and Pennington Town Council - to undertake the examination of the draft Neighbourhood Plan and to prepare a report of the independent examination.
- 1.7. The Examiner’s report concluded that subject to the modifications set out in Table 1 below, the draft Neighbourhood Plan meets the basic conditions. The Examiner recommended that the Plan, once modified, should proceed to Referendum on the basis that it met all the relevant legal requirements. The Examiner also concluded that the Referendum area does not need to be extended beyond the designated area to which the Plan relates.

Decision

- 1.8. As outlined above, the Neighbourhood Planning (General) Regulations 2012 (as amended) require the District Council to outline what action to take in response to the recommendations made in the Examiner’s Report.
- 1.9. New Forest District Council, New Forest National Park Authority and Lymington and Pennington Town Council have considered each of the recommendations made in the Examiner’s report. Ultimately it is the responsibility of the local planning authorities (New Forest District Council and New Forest National Park Authority) to decide what modifications should be made to the Neighbourhood Plan. Having considered each of the recommendations made by the Examiner’s report (and the reasons for them), New Forest District Council has decided to accept the modifications to the draft Plan. Table 1 on the following pages outline the alterations to be made to the draft Plan under paragraph 12(6) of Schedule 4B to the 1990 Act (as applied by Section 38A of 2004 Act) in response to each of the Examiner’s recommendations.

Table 1 – Modifications

Report reference	Examiner's recommended modification	Examiner's Justification	New Forest District Council Decision
PM1 (Policy LP2)	Amend Clause C by the addition of: "... Town Centre Vision, provided the contributions make the proposals acceptable in planning terms and are directly related to the development."	Ensures compliance with national guidance on planning obligations and aligns with strategic policies.	Accept modification. Strengthens the policy and ensures alignment with national policy.
PM2 (Policy LP3)	Amend the final paragraph to: "For the avoidance of doubt, strategic policy requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD, NFDC air quality monitoring and nutrient neutrality will continue to apply." Amend the boundary for site e) on the Policies Map (Inset 2) to match the Hampshire County Council ownership as shown on the map submitted at paragraph 1.11 of the NFDC response to examiner's questions dated 18 July 2025. Rephrase the final sentence of paragraph 5.11 of the Plan to: "The Solent Mead site is in split ownership between Hampshire County Council (HCC) and NFDC. A decision was made by HCC in 2025 to close its part of the site and it is therefore likely that that part of the site will become available for development during the Plan period. The NFDC housing on the site will remain."	Enhances clarity and ensures alignment with habitat mitigation requirements and air quality monitoring, supporting sustainable development.	Accept modification. For improved clarity and accuracy.

Report reference	Examiner's recommended modification	Examiner's Justification	New Forest District Council Decision
PM3 (Policy LP4)	Amend paragraph 5.15 of the Plan by the inclusion of the following third sentence: "This approach aims to ensure that residents can access day to day services and amenities, for example, convenience shops, education and healthcare facilities." Amend paragraph 5.17 of the Plan by the inclusion of a new penultimate sentence: "Uses which are considered to meet day-to-day needs include Class E(a) convenience food retail for up to a total of 500 sq.m of net internal retail floorspace, Class E(b) café, Class E(d) indoor sport and recreation, Class E(e) medical services, Class E(f) day centre or nursery, Class F1 learning and non-residential institution; and/or a Class F2 local community use of an appropriate scale."	Improves clarity for development management and aligns with national and local retail policies.	Accept modification. Strengthens the policy and ensures alignment with national policy.
PM4 (Policy LP5)	Amend Clause C to: "Proposals including uses which are intended to meet the local communities' day to day needs may be delivered as ground floor units in a scheme with housing on upper floors ...". Amend the second sentence of Clause D to: "Within this context, clustering of uses intended to meet day-to-day community needs in each broad location is preferred."	Enhances clarity and legal precision, ensuring the policy is usable and enforceable.	Accept modification. For improved clarity and accuracy.

Report reference	Examiner's recommended modification	Examiner's Justification	New Forest District Council Decision
	Amend Clause E to: "Proposals including uses which are intended to meet the local communities' day-to-day needs must demonstrate that the site is located and accessible by walking, ...". Amend Clause F to: "Proposals to change the use of land or premises in a walkable community from a use which contributes to meeting the local communities' day-to-day needs to another use will not be supported."	Enhances clarity and legal precision, ensuring the policy is usable and enforceable.	Accept modification. For improved clarity and accuracy.
PM5 (Policy LP6 - Paragraph 5.20)	Delete the final sentence and substitute: "LTC will seek to work with NFDC and local community groups in the preparation of a District wide Design Code which is intended to retain the emphasis on local distinctiveness. The Code will be consulted upon as part of a separate process in due course."	Aligns with national policy which treats SPDs as material considerations, not Development Plan documents.	Accept modification. For improved accuracy.
PM6 (Policy LP7)	Add the following phrase to the end of Clause B: "... taking into account the viability of the scheme."	Addresses concerns about deliverability and aligns with strategic housing policies.	Accept modification. Strengthens the policy and ensures alignment with national policy.

Report reference	Examiner's recommended modification	Examiner's Justification	New Forest District Council Decision
PM7 (Policy LP8)	Amend Clause C to: "All appropriate development should embed Green Infrastructure ..."	Makes the policy more realistic and implementable while supporting nature recovery.	Accept modification. Provides clarity
PM8 (Policy LP11)	Amend Clause A to: "All development (except for householder development) should be "zero carbon ready" ...". Amend Clause B to: "Where feasible, buildings should aim to be certified to a Passivhaus or equivalent standard with a space heating demand of less than 15KWh/m2/year." Amend Clause C to: "All planning applications for new or refurbished buildings should include a demonstration to show that their energy efficiency has been tested to ensure that the buildings will perform as predicted at the design stage."	Post Occupancy Evaluation could affect viability and is difficult to enforce via planning conditions. Modifications ensure the policy remains effective and legally sound.	Accept modification. Strengthens the policy and ensures alignment with national policy.

- 1.10. New Forest District Council, the National Park Authority and Lymington and Pennington Town Council have also identified further minor amendments (in addition to the modifications recommended in the Examiner’s Report). Neither of these affect the ‘Basic Condition’ assessment and are factual updates or minor clarifications to help the accuracy of the document. For clarity this ‘Decision Statement’ provides these amendments (as set out in Table 2 below).

Table 2 – Additional minor amendments

Neighbourhood Plan section	Commentary	New Forest District Council Decision
Policy LP3 – Amend examiners modification (PM2) to include the National Park mitigation strategy: “For the avoidance of doubt, strategic policy requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD <u>in New Forest District, the revised New Forest Habitats Mitigation Scheme SPD in the National Park area</u>, NFDC air quality monitoring and nutrient neutrality will continue to apply.”	The HRA recommended that the policy includes references to the strategic requirements of Bird Aware Solent, the Mitigation for Recreational Impacts on New Forest European Sites SPD and nutrient neutrality which was incorporated into the final sentence of the Submission plan. NFDC asked that a reference is made to air quality monitoring too, and the examiner recommended this (PM2). However, during its 8 October 2025 meeting to agree the examiner modifications, it was noted that for the sake of completeness and accuracy there should also be a reference to the mitigation strategy that addresses development in the parts of the parish that are within the National Park.	Factual updates required to reflect the mitigation scheme in the NPA area.
Policy LP6 (Paragraph 5.20) – Amend examiners modification (PM5) to the correct acronym: Delete the final sentence and substitute:	The examiners modification is accepted, however the acronym that he has used (LTC) is not factually correct and omits the Pennington element: an amendment is made to the proposed modification to reflect the full name of the parish council.	Factual update required to improve accuracy.

"LTC (LPTC) will seek to work with NFDC and local community groups in the preparation of a District wide Design Code which is intended to retain the emphasis on local distinctiveness. The Code will be consulted upon as part of a separate process in due course." Inset acronym into paragraph 1.1 to provide the explanation for what LPTC stands for: "Lymington and Pennington Town Council (LPTC) is preparing a Neighbourhood Plan..."		
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Council – 26 February 2026

Questions Under Standing Order 22

First Questions

Question 1

From Cllr Hilary Brand to the Portfolio Holder for Environment and Sustainability, Cllr Geoffrey Blunden

We have been informed that the Wheelie bin roll out for Phase 3 has been delayed until May 2026 due to wheelie bin manufacturing schedules. Does this include a delay to the food waste collection?

Question 2

From Cllr Mark Clark to the Portfolio Holder for Planning and Economy, Cllr Derek Tipp

How many conservation officers did we have five years ago and how many now?

Question 3

From Cllr David Millar to the Portfolio Holder for Environment and Sustainability, Cllr Derek Tipp

Storm Chandra struck on 26 January, and since then sustained rainfall has left many parts of our district flooded, roads impassable, farmland waterlogged and businesses disrupted. In Fordingbridge, residents have again experienced how vulnerable the town is to prolonged rainfall – for many, this is the fourth or fifth '100 year event' they have lived through in the last 25 years.

At the Local Plan meeting on Friday 13th, around 250 residents braved the conditions hoping to gain assurance as to how this council's potential allocation of almost 3,000 new homes in and around Fordingbridge would avoid worsening flood risk and bringing more infrastructure pressure.

Given the very real concerns raised by residents, can you confirm that the Council will:

1. Ensure that flood mitigation and infrastructure are designed and delivered in advance of or alongside any future development;
2. Take the lead on identifying projects which will mitigate the impact of building on farmland and flood plains across the Avon valley; and
3. Use NFDC's strategic Community Infrastructure Levy to guarantee that existing and future residents of Fordingbridge are not left living in demonstrably worse conditions just so that this Council might meet Government housing targets?

Question 4

From Cllr Alex Wade to the Portfolio Holder for Environment and Sustainability, Cllr Geoffrey Blunden

Please can you confirm in the Phase 3 area how many properties have requested assisted collections for the new waste collection service, and what per cent have we rejected? And, what consideration are we giving to Resident challenges on medical waste additional requirements?

Question 5

From Cllr John Haywood to the Portfolio Holder for Planning and Economy, Cllr Derek Tipp

A number of parishes in the district now have Neighbourhood Plans. Neighbourhood Plans represent the end point of years of effort, a large part of it done by volunteers. People who are passionate about their area freely give their time to shape its development at a very local level, supported by planning professionals.

Neighbourhood plans are the only part of the district's local plan that have a direct democratic basis through a local referendum, and once made, they become an integral part of the local plan itself. Congratulations by the way to Lymington and Pennington for the clear "Yes" in their Neighbourhood Plan referendum.

In Ringwood we are becoming frustrated by the number of times that neighbourhood plan policies are being over-ridden by this council in planning decisions.

Can I ask the portfolio holder: in how many planning decisions have neighbourhood plan policies been over-ridden by this council in the past year?

Second questions

Question 6

From Cllr Mark Clark to the Portfolio Holder for Planning and Economy, Cllr Derek Tipp

Can the Council consider issuing a Section 48 Notice to the Owner of the Hythe Pier to effect immediate repairs to the structure given the Ferry business is now up for sale and the public would wish to see the return of the Ferry service to a sound and safe landing stage?

Question 7

From Cllr John Haywood to the Portfolio Holder for Environment and Sustainability, Cllr Geoffrey Blunden

A number of residents have approached me with concerns about vermin infestations in their gardens and homes being caused by the council's new food waste collection service.

Can I ask the portfolio holder if the council has seen an increase in reports of vermin across the district since the roll-out, and if any investigations into the impact of the new food waste collection service on vermin infestations have been made?

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