

NOTICE OF MEETING

Meeting:	CABINET
Date and Time:	WEDNESDAY, 2 DECEMBER 2020, AT 10.00 AM*
Place:	SKYPE MEETING - ONLINE
Enquiries to:	democratic@nfdc.gov.uk Tel: 023 8028 5072 - Matt Wisdom

PUBLIC PARTICIPATION:

* Members of the public may speak in accordance with the Council's public participation scheme:

- (a) immediately before the meeting starts, on items within the Cabinet's terms of reference which are not on the public agenda; and/or
 - (b) on individual items on the public agenda, when the Chairman calls that item.
- Speeches may not exceed three minutes.

Anyone wishing to speak should contact the name and number shown above no later than 12.00 noon on Friday 27 November 2020. This will allow the Council to provide public speakers with the necessary joining instructions for the Skype Meeting.

Bob Jackson
Chief Executive

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www.newforest.gov.uk

This Agenda is also available on audio tape, in Braille, large print and digital format

AGENDA

Apologies

1. MINUTES

To confirm the minutes of the meeting held on 4 November 2020 as a correct record.

2. DECLARATIONS OF INTEREST

To note any declarations of interest made by members in connection with an agenda item. The nature of the interest must also be specified.

Members are asked to discuss any possible interests with Democratic Services prior to the meeting.

3. PUBLIC PARTICIPATION

To note any issues raised during the public participation period.

4. COVID-19 RESPONSE AND RECOVERY - REPORT FROM THE LEADER OF THE COUNCIL

To receive a verbal report from the Leader of the Council and Portfolio Holders.

5. COVID-19 RECOVERY - LOCAL ECONOMY TASK AND FINISH GROUP (Pages 5 - 12)

6. PROPOSED IMPLEMENTATION OF RESTRICTIONS CONTAINED IN S157 HOUSING ACT 1985 TO RESTRICT ONWARD DISPOSALS OF COUNCIL PROPERTIES SOLD UNDER THE RIGHT TO BUY (RTB) IN DESIGNATED RURAL AREAS, NATIONAL PARK AND AREAS OF OUTSTANDING NATURAL BEAUTY WITHIN THE NEW FOREST DISTRICT COUNCIL ADMINISTRATIVE AREA (Pages 13 - 26)

7. MITIGATION FOR RECREATIONAL IMPACTS ON NEW FOREST EUROPEAN SITES - DRAFT SUPPLEMENTARY PLANNING DOCUMENT (Pages 27 - 96)

8. ICT STRATEGY AND BUDGET UPDATE (Pages 97 - 102)

9. FINANCIAL MONITORING REPORT (Pages 103 - 110)

10. COUNCIL TAX 2021/22 - SETTING THE TAX BASE (Pages 111 - 118)

11. ADDITIONAL MEETING DATE 2021

To agree the following additional Cabinet meeting date in 2021:-

10.00 am, Wednesday 17 February 2021

NEW FOREST DISTRICT COUNCIL – VIRTUAL MEETINGS

Background

This meeting is being held virtually with all participants accessing via Skype for Business.

A live stream will be available on YouTube to allow the press and public to view meetings in real time and can also be found at the relevant meeting page on the Council's website.

Principles for all meetings

The Chairman will read out Ground Rules at the start of the meeting for the benefit of all participants. All normal procedures for meetings apply as far as practicable, as the new Government Regulations do not amend any of the Council's existing Standing Orders.

The Ground Rules for all virtual meetings will include, but are not limited to, the following:-

- All participants are reminded that virtual public meetings are being broadcast live on YouTube and will be available for repeated viewing. Please be mindful of your camera and microphone setup and the images and sounds that will be broadcast on public record.
- All participants are asked to mute their microphones when not speaking to reduce feedback and background noise. Please only unmute your microphone and speak when invited to do so by the Chairman.
- Councillors in attendance that have not indicated their wish to speak in advance of the meeting can make a request to speak during the meeting by typing "RTS" (Request to Speak) in the Skype chat facility. Requests will be managed by the Chairman with support from Democratic Services. The Skype chat facility should not be used for any other purpose.
- All participants should note that the chat facility can be viewed by all those in attendance.
- All participants are asked to refer to the report number and page number within the agenda and reports pack so that there is a clear understanding of what is being discussed at all times.

Voting

When voting is required on a particular item, each councillor on the committee will be called to vote in turn by name, expressing their vote verbally. The outcome will be announced to the meeting. A recorded vote will not be reflected in the minutes of the meeting unless this is requested in accordance with the Council's Standing Orders.

By casting their vote, councillors do so in the acknowledgement that they were present for the duration of the item in question.

Technology

If individuals experience technical issues, the meeting will continue providing that it is quorate and it is still practical to do so. The Chairman will adjourn the meeting if technical issues cause the meeting to be inquorate, the live stream technology fails, or continuing is not practical.

Public Participation

Contact details to register to speak in accordance with the Council's Public Participation Procedures are on the front page of this agenda.

In order to speak at a virtual meeting, you must have the facility to join a Skype for Business Meeting. Joining instructions will be sent to registered speakers in advance of the meeting.

The Council will accept a written copy of a statement from registered speakers that do not wish to join a Skype Meeting, or are unable to. The statement will be read out at the meeting and should not exceed three minutes. Please use the contact details on the agenda front sheet for further information.

To:

Councillors

Diane Andrews
Jill Cleary
Michael Harris
Edward Heron (Vice-
Chairman)

Councillors

Jeremy Heron
Alison Hoare
Barry Rickman (Chairman)
Mark Steele

COVID 19 RECOVERY – LOCAL ECONOMY TASK AND FINISH GROUP

1. RECOMMENDATIONS:

- 1.1 That the report be noted and that the ongoing initiatives and actions to date and in respect of the second lockdown as outlined in the report be endorsed.

2. INTRODUCTION

- 2.1 This is a summary of the work of the Covid recovery 19 Local Economy task and finish group which was set up by the Cabinet in June 2020 with the following terms of reference:

COVID 19 RECOVERY LOCAL ECONOMY TASK AND FINISH GROUP

Terms of Reference

1. To undertake an impact and opportunity assessment in respect of the impact of Coronavirus – COVID-19 on the New Forest's Local Economy.
2. To undertake a "call for evidence" from local partner organisations.
3. To identify the actions required for recovery arising from the impact and opportunity assessments, and understand the consequences of the COVID-19 crisis.
4. To advise Cabinet on proposals for action.

2.2 Membership

Councillors:

Barry Rickman (Chairman), Alan Alvey, Hilary Brand, Keith Craze, Steve Davies, Arthur Davis, Jacqui England, Mahmoud Kangarani and Joe Reilly

- 2.3 Between June 2020 and October 2020 the group met 8 times, with representatives of the following organisations:

Solent LEP
Brockenhurst College
New Forest Business Partnership
Go New Forest
New Forest Show
Beaulieu Enterprises Ltd / Bucklers Hard
Hampshire Cultural Trust
New Forest Heritage Centre
Forest Arts Centre
Forest Forge Theatre
Associated British Ports
ExxonMobil

3. FINDINGS

This report includes a summary of impacts (statistical and anecdotal) in each sector. The Solent LEP session outlined in the next paragraph provides a good overall picture of these impacts.

The Group heard many examples of the huge impact on the local economy but were pleased to note the resilience, adaptability and optimism shown by the organisations and individuals during this time.

The exercise has not only highlighted a number of opportunities for future partnership working to the benefit of the local area and economy, which are being pursued, but has stimulated greater networking with some of its key partners.

As this report on work to date was being finalised, a second lockdown was announced in early November. The Council awaits details of Government support initiatives in which the Authority will have a role.

4. STATISTICS

The Group heard some very striking statistics on the effect of the pandemic on the local economy:

- In New Forest, 33% of employees were furloughed equating to around 25,000 jobs. This is the highest proportion of any local authority in Hampshire
- New Forest District has shown the highest value of claims against the Self Employment Income Support Scheme of any local authority in the county with around £23m of claims made to date
- Individuals claiming Job Seekers' Allowance increased almost three-fold between March and July. The figure is now its highest total since the recession of the mid 1990s
- Forecasts implied a short-term economic impact on the Solent area worth £4.5bn during the course of 2020, equivalent to a 14.7% drop. Likely to take at least two years for Solent to return to 2019 levels.
- 31% of Solent's employed residents were furloughed in July through the Coronavirus Job Retention Scheme, equivalent to 171,400 jobs
- ¼ of local jobs, businesses and output is supported by sectors at highest short term risk reflecting strong local representation of hospitality, recreation, construction and education sectors.
- Job postings have fallen by 44% across the Solent compared with mid-March just before start of lockdown
- 45,275 people claimed unemployment benefit in July, a rise of 133% since March, and representing nearly 6% of the working age population
- 26,8000 jobs are expected to be lost across the Solent in 2020 according to Experian's latest Covid-19 scenario

- 18,000 Solent SMEs have received Coronavirus grant funding from the Small Business Grants Fund or Retail, Hospitality and Leisure Business Grants Fund administered by local authorities
- 50,000 self-employed residents have claimed financial support through the Self-Employment Income Support scheme as at end of July

5. SOLENT LOCAL ENTERPRISE PARTNERSHIP (LEP)

The LEP acknowledged the Council's substantial support in facilitating and administering over £40m in various government funded business related support grants. The focus of the LEP was on:

Employment and economic impacts
 The need to improve soft skills of young people
 Local skills demand
 Importance of local maritime industries
 The devastation of the visitor economy especially in coastal areas
 The need to attract world class talent and business skills
 The need for high streets to evolve and adapt to changing conditions
 Digital connectivity across the Forest

Action: *The Council has asked the LEP for assistance with improving digital connectivity across the Forest, including lobbying Government.*

6. BROCKENHURST COLLEGE

The focus of the College is on areas important to the local economy such as Hospitality, Marine, Construction and Apprenticeships.

Action: *Discussion at the Task and Finish group has reinforced the Council's wish to work with the College to help secure as many job and training opportunities as possible for our residents and embed Employment and Skills Plans for all new development within the District. The Fawley developments will have such a requirement and the Council will need to ensure that joins together with DWP/training providers to assist with delivery.*

7. NEW FOREST BUSINESS PARTNERSHIP (NFBP)

The Group heard that the New Forest economy, although having faced a challenging time, had broadly kept going. The impact on businesses varied, where some had suffered serious income losses, whilst others had even flourished.

NFBP acknowledged that NFDC and the Government had done their utmost to help businesses. NFBP also paid tribute to the NFDC Economic Development Team, which had dealt with over 1000 calls during the Covid crisis.

NFDC had delivered over £40m in various Government grants swiftly and efficiently, and had been 2nd in a national 'league table' in terms of % of grants distributed and available funds spent. NFBP had directed businesses to these grant schemes. £120k in funding had now been obtained from the Solent LEP which was a match funding scheme across two separate grant schemes.

While High Street initiatives had been on the Council's agenda before the Covid outbreak, it was even more critical now to accelerate change, help create local events, and encourage people back to town centres.

Town centre schemes were afoot to pedestrianise areas to attract visitors and stimulate business growth. Parish and town councils needed to be encouraged to help with this. Temporary road closures also needed to be sought from HCC.

Action: NFDC officers undertook to discuss with HCC various different funding streams, as well as Section 106 and CIL monies, to pursue public realm improvement schemes such as improving the appearance of areas with railings, pavements, and other schemes in town centres

8. GO NEW FOREST (GNF) - TOURISM AND HOSPITALITY SECTOR

In a normal year, the area would expect to benefit from around 15 million local day and staying visitor days, collectively generating a revenue of around £570m and supporting 20% of all local employment. It is estimated that the New Forest visitor economy had already lost approximately £200m in revenue and that even with restricted reopening, by the end of the year, there will be around £400m in lost in revenue, together with the knock – on effects in the wider economy. The Government financial support has been extremely helpful in enabling most tourism businesses to survive.

GNF completely reconfigured its services and provided regular sector group meetings including daily member business updates on national government advice, and training, assisting businesses to prepare themselves for reopening.

The Group discussed with GNF various promotional initiatives to revive the tourism and hospitality industry. These included Government measures to relax the constraints on local businesses, to encourage outdoor café culture under the Business and Planning Act 2020.

Food businesses (including, pubs, cafes, restaurants, and coffee shops) are able to apply for a pavement licence to place removable furniture over certain highways adjacent to their premise. The licences are temporary and will last until 30 September 2021. Council officers are actively working with businesses to promote this, streamlining and expediting processes to assist businesses so that licences could be obtained from the Council within 7 – 10 days.

Action: The Council will continue to pursue these initiatives and to collaborate with GNF on marketing and promoting the local area.

9. THE NEW FOREST SHOW

It was unfortunate that the pandemic had overshadowed the New Forest Show's centenary year. The Show had been regrettably cancelled and refunds offered to all. On the 1 April all staff had been furloughed, and there was then a forecast loss of £420K against a £2.7m turnover.

The 100 berth campsite closed then but reopened on the 4 July. The Society then opened a second campsite on New Park Farm in mid July, using toilet and shower facilities from the Show. This was a 220 pitch campsite opened for 56 days. Thanks were expressed to Council, Forestry England and the National Park Authority for their help and advice with opening the new campsite. This had helped to mitigate some of the impact of Camping the Forest closing all New Forest sites for the 2020 season.

25,000 people had since used the campsite in the last 56 days, added to 100 berth (13,000 overall) at Longmeadow, which resulted in 38,000 people visiting the Forest over the 56 day period. The income from these meant that the forecast loss of £420k would be significantly less. A lesson learned from this was to diversify the business and get other income streams.

Action: *The Council will work with the show organisers towards running the show in 2021 and encourage tourists to visit the Forest.*

10. BEAULIEU ENTERPRISES LTD / BUCKLERS HARD NEW FOREST HERITAGE CENTRE

New Forest Heritage Centre in Lyndhurst was at the forefront of behavioural and educational messaging for people visiting the Forest. The Centre had shut in March and staff had been furloughed, though the opportunity had been taken to do number of projects during the closure including a reorganisation of the library. It had reopened to visitors on 27 July.

Parts of the Beaulieu estate had reopened in June. River moorings and water access were very busy. There were some management issues with wild camping and paddleboarders and kayakers.

The motor museum reopened with restrictions on numbers and a new booking system, with strong demand mainly from family groups. However the events business had suffered as all events had been cancelled with consequent knock on effects in local hospitality.

11. IMPACT ON THE ARTS SECTOR IN THE NEW FOREST

The group met with representatives from Forest Forge Theatre and Forest Arts (Hampshire Cultural Trust)

The Forest Forge Theatre had managed to survive the last 8 months of lockdown, had retained staff and kept engaged with communities, investing in IT equipment to facilitate development of online events through an Arts Council grant and also added an e-commerce capability to their website to facilitate ticket management and payments.

Teenage users were impacted perhaps more than most, as they had suffered from the isolation and missed out on their normal activities and socialising, though the Theatre had tried to keep in touch with them.

A revamp of the Forest Forge business plan and strategy was planned, including how trustees worked with them and have developed some really interesting ways forward.

Forest Arts Centre reported loss of significant revenue as big shows had to be cancelled due to the pandemic, and the Centre had been closed.

The centre was looking at developing its online offer and needed money for computer equipment. Overall it was now back to working at 60% capacity but this could not be sustained indefinitely. The centre reopened at the end of July with Covid secure conditions. They held summer classes, films and kids' classes were now almost back to normal capacity.

Users appreciated the social aspect which contributed to well being and the centre had a significant role in this regard. Wellbeing classes had been impacted, such as events for Parkinson's sufferers and people with learning disabilities and these were difficult to operate as classes online, at a time when they were needed more than ever.

Members acknowledged the Centre's valuable role, including work with veterans and small touring companies.

Action: *It was noted that the Southampton City Council had bid for the City of Culture 2025, and this NFDC was seeking to support it.*

12. ASSOCIATED BRITISH PORTS (ABP)

The Group received a summary of the effects of the Covid outbreak on ABP.

There were big challenges affecting the supply chains as the cruise industry had ground to a halt, as evidenced by the number of cruise ships anchored around the Solent. It was anticipated that cruises would resume 2021. 86% of Home Port Calls (HPC) (i.e. for a new cruise / voyage) take place in Southampton. Together with calling cruises ABP welcomed some 2.1M passenger movements through the Port every year (not 2020). Each HPC is worth around £2.7M to the wider economy.

On the Automotive industry, vehicles had to be stored by ABP, and automotive had restarted production. Container volumes had slightly reduced. Overall there was a huge impact in the second quarter and beyond. ABP were responding to customer demands as best they could.

Furloughed staff had were gradually returning to work. There were no ABP job losses.

It was still felt that due to its geographical location in the medium to longer term, ABP were well placed and the future was still looking very positive. Brexit was the main issue in the short term. In the long term there were no immediate concerns.

ABP are part of the Solent Freeport working group, whilst the Government has published responses to the Freeport Consultation July 2020 the bidding process for Freeport Status is yet to be launched.

Action: *The Council will watch the results of the Southampton Freeports bids with interest.*

13. EXXONMOBIL

The Group received an outline on the effects of Covid on the operations at Fawley. Some development projects had been slowed down due to the crisis. The business involved £270m in wages and salaries contributions. The pandemic had reduced demand for fuel in commercial haulage and private vehicles. Petrol demand was down by 10 to 20% and diesel similar. Heathrow and Gatwick operations remained down 30 to 40%. The plant produced chemicals critical in Pharmaceuticals.

Covid compliance measures had been put in place at the plant and staff were returning back to offices. The control room required highly specific skilled staff which was a concern during the pandemic. The company continued to watch government requirements closely.

Action: *Exxon welcomed NFDC's support on the Local Resilience Forum.*

14. PORTFOLIO HOLDER COMMENTS

- 14.1 I am pleased with the thorough and diverse amount of business and associated organisations that took part in the work of the Local Economy Task and Finish Group. These regional and also very local bodies demonstrated the resilience, adaptability and optimism shown by our partners during this difficult time.

Further Information

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PROPOSED IMPLEMENTATION OF RESTRICTIONS CONTAINED IN S157 HOUSING ACT 1985 TO RESTRICT ONWARD DISPOSALS OF COUNCIL PROPERTIES SOLD UNDER THE RIGHT TO BUY (RTB) IN DESIGNATED RURAL AREAS, NATIONAL PARK AND AREAS OF OUTSTANDING NATURAL BEAUTY WITHIN THE NEW FOREST DISTRICT COUNCIL ADMINISTRATIVE AREA

1. RECOMMENDATIONS

That the Cabinet:

- (a) Approves the draft Policy for consultation purposes.

2. INTRODUCTION

- 2.1 Section 157 of the Housing Act 1985 allows Housing Authorities to restrict onward disposals of former RTB properties in designated rural areas, the National Park and Areas of Outstanding Natural Beauty (which shall be referred to, for ease of reference for the purposes of this report, as the 'protected areas') so that they can only be sold to people who have lived or worked in the 'protected areas' for at least 3 years.
- 2.2 Currently, the only restrictions that apply to such Council dwellings is the mandatory statutory regime contained in section 156A Housing Act 1985 (introduced by Housing Act 2004), which gives the Council the right of first refusal on a subsequent disposal of a former Council dwelling within the 'protected areas' for a period of 10 years following the exercise of the original RTB. This potentially enables the Council to buy back the former Council dwelling at full market value should it come up for sale within the 10 year period. To date, no former Council properties have been bought back in this way.
- 2.3 The ability to restrict onward disposals of former Council dwellings within 'protected areas' under section 157 is a discretionary power and, if adopted, will only apply to Council dwellings sold under the RTB from the date the Council decides to adopt the power.

3. BACKGROUND

- 3.1 Rural areas face special difficulties when it comes to affordable housing. Not only is there less affordable housing and greater problems with affordability, opportunities to build a new supply of such housing for future generations is extremely limited.
- 3.2 When allocating Council housing within the rural areas, the Council's overriding aim has always been to ensure that local people, connected to the specific community within which the housing exists, were allocated the housing. This has been the cornerstone of the Council's Housing Allocation policy for many decades.

- 3.3 Affordable housing for people who already live and/or work in rural areas is crucial to the availability of local services, a thriving local economy and being able to draw upon the support of family.
- 3.4 The RTB legislation has always allowed Council tenants, even within rural areas, to exercise their right to buy. That has had the effect of reducing the numbers of Council housing in these important areas. This is in contrast to social housing owned by Housing Associations and other Registered Providers, whose tenants are not permitted to buy their property, if it is located within rural areas.
- 3.5 The Council's Housing Strategy (adopted in December 2018) includes a number of key objectives, including the aim to secure greater numbers of affordable housing in rural areas. To help achieve this important objective, consideration should be given as to whether the Council adopts a more restrictive approach to the future disposal of Council houses sold under the RTB in rural areas, by requiring that they can only be sold or let to those living or working within those rural areas. Such a policy would capture both existing council-owned stock and newly-built homes for rent within the designated rural areas.

4. A LOCAL CONNECTION RESTRICTION

- 4.1 As an alternative to the 10-year pre-emption referred to in paragraph 2.2, local authorities can choose to impose a restriction on the sale of former Council houses in rural areas so that they can only be sold to those with a "local connection". Section 157 Housing Act 1985 is a discretionary power available to Housing Authorities which, if adopted, has the effect of restricting future disposals (i.e. freehold or leasehold sales) of Council dwellings following the exercise by a tenant of their RTB to those with a local connection. Section 157 can only apply to dwelling houses in areas designated by the Secretary of State as a rural area (SI 1981 No 397 designated the perambulation of the New Forest as a rural area), a National Park or an Area of Outstanding Natural Beauty. So for the purposes of a local connection restriction, any Council dwelling falling within the former perambulation, the National Park or an Area of Outstanding Natural Beauty within the District could have a local connection restriction applied to it.
- 4.2 Covenants would be imposed when the Council dwelling is sold under the RTB, which requires the consent of the Council to any future disposal. The legislation stipulates that such consent shall not be withheld if the disposal is to a person who has lived or worked in the 'protected areas' for at least 3 years. If imposed, the same covenant would also apply to the letting of a property within a 'protected area', whereby the new tenant would also have lived or worked in the 'protected areas' for 3 years, or the property is let on the basis that it was the new occupants' only or principal home. The local connection covenant would apply "in perpetuity", not just to the first sale or letting.
- 4.3 Some other Councils have mitigated the effects of a "local connection restriction" by having a policy to exercise discretion within their own schemes to waive a restriction in exceptional circumstances. Such waivers would allow a sale to go through, but the covenant would remain in place for the future. Examples of exceptional circumstances could include:
 - **Personal circumstances** - if prospective purchasers have not lived or worked in the 'protected areas' for the requisite 3 year period but they can show strong connections through former residence or employment, or can demonstrate some exceptional benefit to others that would come about by living in the area.

- **Owners unable to sell or let their home** - at a price that takes into account of the s157 restriction. Evidence is required that the owner has marketed the property for sale or rent for at least 12 months.

5. EFFECT OF INTRODUCING A LOCAL CONNECTION RESTRICTION

- 5.1 The introduction of a local connection restriction under s157 ensures that any future Council dwellings sold under the RTB, when subsequently disposed of, can only be sold to a local person who has lived or worked in the 'protected areas' for 3 years or more. The 3 years requirement would also apply to the letting of such properties unless the letting is to a person who will use the property as their only and principal home.
- 5.2 S157 creates the benefit of retaining housing for people living or working in the rural areas of the New Forest, as the opportunity to deliver new housing within rural areas is extremely limited. With s157 restrictions imposed, such housing is likely to remain more affordable than open market housing without any restriction.
- 5.3 The Council's Estates and Valuation Section consider that properties with a s157 covenant imposed could resell for prices between 5% and 25% lower than would be the case if the restriction were not imposed, depending on the market and local circumstances at the time, on a case by case basis. The benefit of this means that such dwellings are likely to be more affordable than other market houses in the locality.
- 5.4 The potential for a reduced sale value sometime in the future would not affect the tenant when they exercise their RTB, although it might affect the value of the capital receipt received by the Council at this time by between 5% and 25%, depending on the market and local circumstances at the time, again on a case by case basis. It becomes relevant should the owner wish to sell their former Council property in the future.
- 5.5 If the Council implemented a local connection restriction under s157, it would not apply retrospectively but would apply to future RTBs within the 'protected areas'. Anyone wishing to exercise their RTB would do so in the knowledge that there would be restrictions on future disposals. This is considered a proportionate proposal to counter the obvious negative effects that come about through the loss (and increasing diminishing numbers) of affordable homes in the rural areas of the New Forest. If the Council were to implement a local connection restriction it could, of course, include waivers where, in exceptional circumstances, the restriction could be relaxed.
- 5.6 In carrying out research on the stance taken by other Councils, it is clear that other rural Councils similar to New Forest District Council, operate a local connection restriction including Norfolk, Cotswold District Council, South Oxfordshire, Devon, Cornwall and Chichester Council. Many operate a strict s157 regime and some have built in a waiver procedure if potential purchasers (who cannot comply with the 3 year occupancy or work condition) can demonstrate that they will bring 'significant' other benefit to the area.

6. INFORMATON ABOUT COUNCIL DWELLINGS WITHIN THE DISTRICT

- 6.1 In the 1980s, New Forest District Council owned a total of 9,257 Council dwellings across the whole of its administrative area. Approximately 1,400 of these dwellings were in rural areas. Today 558 council-owned homes remain within the New Forest National Park and the Cranborne Chase Area of Outstanding Natural Beauty. The numbers of Council dwellings across the whole District currently stands at 5,134. Rural Council dwellings within the designated protected areas therefore make-up 11% of the Council's current stock.
- 6.2 So far, only 2 Council houses have been offered back to the Council (under the first refusal provisions) referred to in paragraph 2.2 above. They were deemed too expensive to buy back at full market value. One of these properties was sold under the RTB in 2014 and had a market value of £265K at that time. RTB discount at the time was £77K. When it was offered back to the Council in 2020, it was marketed for £500k and was deemed not to be good value for money for the Council to buy back.
- 6.3 Had these former Council dwellings had the local connection restriction imposed, it would have restricted future disposals to people living or working in the rural areas of the New Forest.

7. CONCLUSION

- 7.1 The Council has the ability, through s157 Housing Act 1985, to take action to restrict the future disposal of the remaining 558 Council dwellings that exist within the designated rural areas, and newly-built Council rented homes therein, so they remain available for people living or working in the rural areas of the New Forest to buy. Any scheme that is implemented could contain provisions where there are genuine and good reasons to waive the restriction.

8. PROPOSED WAY FORWARD

- 8.1 A proposed local connection scheme under s157 Housing Act 1985 and how it would operate is set out at Appendix 1.
- 8.2 Prior to making a final decision on adopting a local connection policy, it is proposed that the Council undertakes a consultation process on the proposal. In this respect, those current tenants within the 'protected areas' would be directly consulted, as well as Parish Councils within these areas. There would also be the opportunity for others to also give their view through a wider consultation which would appear on the Council's website.
- 8.3 Following consideration of this proposal by the Housing Overview and Scrutiny Panel, the matter will be considered by the Cabinet at its meeting in December. If approved, the consultation would commence and the results reported back to Cabinet in February, with Council making any final decision to implement a Local Connection Restriction Policy.

9. FINANCIAL IMPLICATIONS

- 9.1 There may be a reduction in the capital receipt accruing to the Council when the Council dwelling is first sold by between 5 - 25%, depending on local market conditions at the time, on a case by case basis.

10. ENVIRONMENTAL AND CRIME AND DISORDER IMPLICATIONS

- 10.1 There are none.

11. EQUALITIES IMPLICATIONS

- 11.1 The Council is subject to the public sector equality duty, as set out in section 149 of the Equality Act 2010. The duty covers defined protected characteristics comprising age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex; and sexual orientation. The Council must have due regard to the requirements of the public sector equality duty in the exercise of its functions, particularly in the introduction of new policies.
- 11.2 This report sets out the aims and objectives of the proposed Local Connection Restriction Policy. As described in paragraph 8 of this report, before any decision is made, the proposed Policy will be subject to a targeted consultation of those current tenants within the 'protected areas' as well as Parish Councils within these areas. There will also be an opportunity for others to feedback their views through a wider consultation on the Council's website.
- 11.3 It is considered that the proposed Policy will have a positive impact on those with protected characteristics as it will increase the options for affordable home ownership in the 'protected areas'; particularly for those who have limited income due to age, gender or disability. However, it is recognised that it may have an impact on those who do not readily meet the Council's proposed local connection restrictions. The Council considers its proposed local connection restrictions strike a fair balance of promoting local priorities whilst limiting the adverse impact on such groups, particularly taking into account the discretionary ability to waive the restrictions in the exceptional circumstances outlined in paragraph 4.3 of this report.
- 11.4 Whilst it is not currently considered that the proposed Policy will have an adverse equality impact, the consultation exercise will assist in assessing the likely equality impact on different groups of people. Further consideration can be given to this matter after the consultation exercise has taken place to enable the Council to ensure compliance with its duties under the Equality Act 2010 going forward.

12. PORTFOLIO HOLDER COMMENTS

- 12.1 I support the draft Policy and look forward to receiving the responses to the consultation.

13. HOUSING OVERVIEW AND SCRUTINY PANEL COMMENTS

- 13.1 The Panel was delighted to receive this proposal for review and offered their full support.

Further Information:

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Draft Local Connection Restriction Policy

December 2020

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PURPOSE OF POLICY

The Council is adopting a new policy under section 157 Housing Act 1985 to allow it to implement restrictions on sales of Council properties in defined rural areas following the Right to Buy, so that properties can only be sold to people with a local New Forest connection.

Over the years, Council properties in rural areas have significantly diminished, meaning that future generations are often not able to secure housing and have to move away from the area. The purpose of this policy is to ensure that local people continue to have access to housing which serves local needs and is more affordable than other market housing in the area.

A copy of s157 Housing Act 1985 is attached to this policy at Appendix 1.

THE RURAL AREAS COVERED BY THE POLICY

The policy applies to Council dwellings within the following designated areas:

- the area defined as the Perambulation of the New Forest
- the National Park area
- Areas of Outstanding Natural Beauty

The designated areas referred to above with currently owned Council stock include:

Boldre	East Boldre	Sway
Bramshaw	Ellingham, Harbridge and Ibsley	Whitsbury
Bransgore	Hale	Woodgreen
Brockenhurst	Lyndhurst	
Burley	Martin	
Calshot	Minstead	
Copythorne	Netley Marsh	
Damerham	Rockbourne	

The policy will also apply to any future new-build council dwellings that are subject to the Right to Buy within the designated areas.

HOW THE RESTRICTION WILL WORK

When a Council property is sold under the Right to Buy, the Council will impose a covenant under s157 of the Housing Act 1985, which requires the consent of the Council to any future disposal of that property.

The Council cannot withhold its consent if the disposal is to a person(s) who has lived or worked in the designated rural areas for the last 3 years.

The covenant will apply to both freehold and leasehold sales.

The covenant will also apply to the letting of the property (i.e. the granting of a tenancy or licence).

The Council's consent cannot be withheld if the letting is to a person(s)

- who has lived or worked in the rural areas for at least 3 years or,

- whose only or principal home is and throughout the duration of the tenancy or licence, remains the dwelling

The restriction will only be imposed on council properties sold within the protected areas from the time this Policy is adopted. It will not apply to past sales.

MAKING AN APPLICATION TO WAIVE THE RESTRICTION

Whilst the Council will not remove a local connection restriction, it will in exceptional circumstances consider requests to waive a restriction. If granted, this will allow an owner to sell or let the property to a person who does not meet the terms of the restriction. The Council will consider applications to waive the restrictions in the following situations:

PERSONAL CIRCUMSTANCES for purchasers or prospective tenants who have not lived or worked in the rural areas for the last 3 years, but can show strong connections through former residence or employment, or can demonstrate exceptional benefit to the wider community that would come about by living in the area.

OWNERS UNABLE TO SELL OR LET THEIR HOMES at a price that takes into account the s157 restriction. Evidence is required that the owner has marketed the property for sale or rent for at least 12 months.

SELLING A PROPERTY WITH A LOCAL OCCUPANCY RESTRICTION

If you are selling a property with a local occupancy restriction, you must make your Estate Agent aware of the restriction. Your agent should include information about the local occupancy restriction once they advertise the property for sale.

Once you have agreed a sale, it is the responsibility of the purchaser's solicitor to obtain the Council's permission for the buyers to proceed with their purchase.

GUIDANCE ON MAKING AN APPLICATION TO WAIVE A LOCAL CONNECTION RESTRICTION

You can make your request for the local connection restriction to be waived by contacting the Housing Strategy and Development Team by emailing housing.development@nfdc.gov.uk. Once the Council has all the necessary information, a decision will be made in consultation with the Portfolio Holder for Housing Services.

PLEASE NOTE THAT IF THE COUNCIL DECIDES TO WAIVE A LOCAL CONNECTION RESTRICTION, IT WILL DO SO ONLY FOR A SINGLE DISPOSAL; THE RESTRICTION WILL CONTINUE TO APPLY ON FUTURE SALES OR LETTINGS OF THE PROPERTY.

EXEMPTED DISPOSALS

S160 Housing Act 1985 lists a number of "exempted disposals" and if the transaction in question is an exempted disposal then the provisions of s157 would not apply to that transaction.

Exempted disposals include:

- Disposal under a will or an intestacy,
- Disposal between spouses (for example from a joint names of husband and wife to wife's sole name),
- Disposal to a member of the family* of the person making the disposal and that family member has resided with the seller throughout at least a 12 month period ending with the disposal,
- Sale or disposal of property in connection with matrimonial proceedings, or civil partnership proceedings,
- Orders as to financial provisions to be made from estate

*Family members include parent, child, grandchild, brother, sister, uncle, aunt, nephew, niece and including relationships by marriage, step-family members.

For further advice on the applicability of these exemptions, please contact the Housing Strategy and Development Team.

APPENDIX 1
Section 157 Housing Act 1985

(1) Where in pursuance of this Part a conveyance or grant is executed by a local authority or a housing association ("the landlord") of a dwelling-house situated in

(a) a National Park,

(b) an area designated under section 82 of the Countryside and Rights of Way Act 2000 as an area of outstanding natural beauty, or

(c) an area designated by order of the Secretary of State as a rural area, the conveyance or grant may (subject to section 156A(8)) contain a covenant limiting the freedom of the tenant (including any successor in title of his and any person deriving title under him or such a successor) to dispose of the dwelling-house in the manner specified below.

(2) The limitation is, that until such time (if any) as may be notified in writing by the landlord to the tenant or a successor in title of his

(a) there will be no relevant disposal which is not an exempted disposal without the written consent of the landlord; but that consent shall not be withheld if the disposal is to a person satisfying the condition stated in subsection (3) and

(b) there will be no disposal by way of tenancy or licence without the written consent of the landlord unless the disposal is to a person satisfying that condition or by a person whose only or principal home is and, throughout the duration of the tenancy or licence, remains the dwelling-house.

(3) The condition is that the person to whom the disposal is made (or, if it is made to more than one person, at least one of them) has, throughout the period of three years immediately preceding the application for consent or, in the case of a disposal by way of tenancy or licence, preceding the disposal

(a) had his place of work in a region designated by order of the Secretary of State which, or part of which, is comprised in the National Park or area, or

(b) had his only or principal home in such a region;

or has had the one in part or parts of that period and the other in the remainder; but the region need not have been the same throughout the period.

(4).....

(5).....

(6) A disposal in breach of such a covenant as is mentioned in subsection (1) is void and, so far as it relates to disposals by way of tenancy or licence, such a covenant may be enforced by the landlord as if

(a) the landlord were possessed of land adjacent to the house concerned; and

(b) the covenant were expressed to be made for the benefit of such adjacent land.

(6A) Any reference in the preceding provisions of this section to a disposal by way of tenancy or

licence does not include a reference to a relevant disposal or an exempted disposal.

(7) Where such a covenant imposes the limitation specified in subsection (2), the limitation is a local land charge and the Chief Land Registrar shall enter a restriction in the register of title reflecting the limitation.

(8) An order under this section

(a) may make different provision with respect to different cases or descriptions of case, including different provision for different areas, and

(b) shall be made by statutory instrument which shall be subject to annulment in pursuance of a resolution of either House of Parliament.

DRAFT

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MITIGATION FOR RECREATIONAL IMPACTS ON NEW FOREST EUROPEAN SITES: DRAFT SUPPLEMENTARY PLANNING DOCUMENT

1. RECOMMENDATIONS

- 1.1 That the Cabinet agree that the draft Supplementary Planning Document (SPD) “Mitigation for Recreational Impacts on New Forest European Sites” be published and subject to a six-week period (or equivalent) of public consultation.
- 1.2 That prior to publication, the final editing of the draft document (attached in Appendix 1 to this report) be agreed by the Chief Planning Officer in consultation with the Portfolio Holder for Planning and Infrastructure.

2. INTRODUCTION

- 2.1 The purpose of this report is to seek approval, for the purposes of public consultation, of the publication of a draft supplementary planning document (SPD) in support of the adopted Local Plan 2016-2036 Part 1: Planning Strategy (July 2020), and in particular Policy ENV1: Mitigating the impacts of development on international nature conservation sites. The document is a guidance document. The policies it relates to have already been adopted by the Council when adopting the Local Plan 2016-2036 Part 1: Planning Strategy.

3. BACKGROUND

- 3.1 In June 2014 the Council adopted its ‘Mitigation Strategy for European Sites: Recreational Pressure from Residential Development. This provide additional guidance to the implementation of Policy DM3 of the Local Plan Part “: Sites and Development Management Development Plan Document adopted in 2014. This policy has now been superseded by Policy ENV1 in the recently adopted Local Plan 2016-2036 Part 1: Planning Strategy (July 2020). While the approach to mitigating the recreational impacts of new development on the New Forest’s internationally designated nature conservation sites was confirmed in the local plan review, some changes were required to the Council’s strategy for mitigation of recreational impacts. These can be summarised as:
 - The requirement for at least 8 hectares of alternative natural recreational greenspace (ANRG) was to be made wholly additional to the public open space requirements of Policy CS7; and
 - Recognition that occupiers of new dwellings would also visit the New Forest protected sites and these visits would need to be mitigated by access and visitor management measures.
- 3.2 The context of the original mitigation strategy was one of much lower levels of new development than now being planned for in the district than previously. Higher levels of overall development now need to be addressed. The changes in the mitigation strategy set out above, and agreed through the Local Plan process, are a response to these higher levels of growth. These changes, together with the experience gained from implementing a recreational mitigation strategy over a six-year period, have informed the revised Recreational Mitigation Strategy SPD.

- 3.3 The purpose of the SPD is to give additional guidance on the implementation of Policy ENV1. It will assist the development industry in understanding the Council's requirements and expectations, and the measures that will need to be secured to satisfy the local planning authority, as the competent decision-making authority for planning applications, and which will need to be in place for development that is 'permitted development' under the General Permitted Development Order', to meet the requirements of the Conservation of Habitats and Species Regulations 2017. The SPD also sets out the ways in which the Council will monitor the effectiveness of the mitigation measures.
- 3.4 A preliminary draft of this SPD was published for public consultation in June 2018 to accompany the publication of the pre-submission Local Plan 2016 -2036: Part 1: Planning Strategy. The comments made during that earlier consultation have been taken into account as part of the preparation of this revised draft SPD, together with the outcome of the Local Plan Examination and results of the recently published New Forest Visitor Study (2020).

4. OUTLINE OF THE SPD CONTENT

- 4.1 The SPD includes the following matters:
- Background information, including highlighting the wider planning benefits to health, wellbeing and access to nature for local residents, and to the environment in respect of climate change, improved ecological value and water quality
 - Legislative and Policy Requirements
 - The type of development required to mitigate recreation impacts
 - Calculating the mitigation requirement
 - Mitigation measures for sites of 50 or more dwellings, including guidance on the design of 'Alternative Natural Recreational Greenspaces' (ANRGs)
 - Mitigation measures for sites of 49 or less dwellings, including enhancement of existing greenspaces and recreational walking routes
 - Access and visitor management measures
 - Monitoring arrangements
 - Implementation Arrangements
 - Funding and contributions
- 4.2 Unlike the previous SPD, the document does not include a full programme of off-site mitigation projects for the full plan period. It is intended to separately agree and publish a five-year programme of off-site mitigation projects, which will be reviewed annually. This will allow off-site project delivery to be more responsive to changing needs and opportunities. To avoid duplication, the SPD is now focused solely on the recreational impacts on the New Forest European Sites. Addressing the impacts of local resident's recreational use of on the Southampton Water and Solent Coast European Sites is dealt with by the separate Solent Recreation Mitigation Strategy, adopted by the Council in December 2017.

5. NEXT STAGES

- 5.1 The exact dates for the period for public consultation on this draft document will need to take account of the Christmas/New Year holiday period and may therefore be slightly extended beyond the normal six-weeks. All comments made during the consultation period will be considered and taken into account in the preparing the final version of this document for consideration by Cabinet.

6. FINANCIAL IMPLICATIONS

- 6.1 The measures set out in this report will be funded by Developers' contribution requirements set out in the Supplementary Planning Document. This will help ensure that new development funds the necessary infrastructure to achieve a sustainable development in accordance with the Local Plan, without being a burden on public finances.

7. CRIME & DISORDER IMPLICATIONS

- 7.1 There are none.

8. ENVIRONMENTAL IMPLICATIONS

- 8.1 The Supplementary Planning Document aims to ensure that all new development is achieved to a high standard of design, is sustainable, and can be achieved without an adverse impact on European Nature Conservation sites.

9. EQUALITY & DIVERSITY IMPLICATIONS

- 9.1 There are none.

10. DATA PROTECTION IMPLICATIONS

- 10.1 There are none

11. PORTFOLIO HOLDER COMMENTS

- 11.1 I am supportive of the recommendations for the reasons outlined within the report, and look forward to the outcome of the consultation.

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Background Papers:

Published documents

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New Forest District outside the National Park

Mitigation for Recreational Impacts

On New Forest European Sites

Supplementary Planning Document

Enabling the Delivery of Green Growth

Draft for Cabinet - November 2020
Appendix 1

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1.0 Executive Summary

1.1 This Supplementary Planning Document relates to the Local Plan for New Forest District outside of the National Park. The plan area, which lies on the south coast between the Southampton and Bournemouth conurbations, skirts around the New Forest National Park. The area includes and is close to a number of significant environmental designations of international nature conservation importance that are protected by legislation and the Conservation of Habitats and Species Regulations 2017 ('Habitats Regulations'), which seek to ensure that development proposals do not harm the protected sites. This document specifically relates to:

New Forest European Sites

- The New Forest SAC;
- the New Forest SPA;
- the New Forest Ramsar site ('New Forest European sites')

1.2 This document provides supplementary planning guidance to the Local Plan 2016-2036 Part 1: Planning Strategy and Local Plan Part 2: Sites and Development Management DPD saved policies adopted in 2014. It gives detailed guidance on the implementation of **Policy ENV1: Mitigating the impact of development on International Nature Conservation sites**, in regard to recreational impacts. Mitigation of the effects of air and water quality on European nature conservations sites is dealt with separately.

1.3 The Habitats Regulations Assessment of the Local Plan concluded that the recreational impacts on designated sites arising from planned residential development, either alone or in combination with other plans or projects need to be addressed. To enable the planned residential development to proceed the Conservation of

Habitats and Species Regulations require that appropriate mitigation measures are in place to ensure that the proposed development can take place without a harmful impact on the integrity of protected sites.

1.4 Mitigation for recreational impacts has four main elements:

- Provision of new areas of publicly accessible alternative natural recreational greenspace;
- Enhancement of existing greenspace and footpaths/rights of way in all settlements where new residential development takes place;
- Access and visitor management – measures include the provision of rangers for the New Forest European sites;
- Monitoring – the gathering of further information, including about the condition of European sites' habitats and species and visitor patterns, and to gain a better understanding of the effects of visitors and other factors influencing the condition of the protected sites; and the monitoring of progress in implementing the mitigation strategy.

1.5 The main changes between Policy ENV1 and the previously adopted approach are:

- All developments will now be required to contribute to access and visitor management (this was previously only a requirement for developments under 50 dwellings).
- The 2ha informal open space element of saved policy CS7 can no longer offset the 8ha recreational mitigation requirement for sites over 50 dwellings.

1.6 These enhancements of mitigation requirements recognise the additional pressures on European sites, most notably the New Forest, arising from the very significant increase in development

rates from the previous plan and the recognition that other mitigation measures will not be 100% effective in deflecting visits away from designated sites.

- 1.7 The mitigation projects this strategy will deliver are fundamentally about restoring the 'status quo' in terms of impacts on the designated European sites. However, in providing improvements to existing open space or creating new alternative recreational opportunities, there will also be direct benefits to residents, their local environment and in turn enables the Council to deliver greener growth that contributes towards the delivery of environmental net gain in the Plan Area.
- 1.8 The delivery of the appropriate mitigation measures is a key component of the Infrastructure Delivery Plan (IDP) for the plan area, and the implementation of the mitigation projects is a critical requirement within the IDP. Mitigation measures will be provided and/or funded by the developers of the new residential development within the Plan Area.

2.0 Introduction and background to the Strategy

Introduction

2.1 This Mitigation Strategy covers the New Forest District (outside the National Park) Local Plan Area, shown in the figure below.



Figure 1: The Plan Area

2.2 New Forest District lies on the south coast between the Southampton and Bournemouth conurbations. The area is subject to significant environmental designations, including European nature conservation sites. Under the requirements of the Conservation of Habitats and Species Regulations the Council has

a duty to ensure that the effects of its Plan do not have an adverse effect on the integrity of any European nature conservation designations – Special Protection Areas (SPAs) and Special Areas of Conservation (SACs) (Natura 2000 sites).

2.3 The Habitats Regulations Assessment completed as part of the preparation of both earlier and the **Local Plan 2016-2036 Part 1: Planning Strategy** (adopted July 2020) identified potentially harmful recreational impacts arising from residential development on:

- New Forest SAC/SPA/Ramsar site (New Forest European sites)
- the Solent and Southampton Water SPA/Ramsar site/Solent
- Isle of Wight Lagoons SAC/Solent Maritime SAC (Solent Coastal European sites).

2.4 To enable the planned residential development to proceed the Conservation of Habitats and Species Regulations require that appropriate mitigation measures are in place to ensure that the proposed development (either alone or in combination with other plans or projects) does not have a harmful impact on the protected sites.

2.5 **This Supplementary Planning Document (SPD) deals specifically with recreational impacts on the New Forest European sites.** Whilst similar in nature, recreational impacts on the Solent Coastal European sites are addressed through the **Solent Recreation Mitigation Strategy**¹ and the requirements it sets out for new homes built within 5.6 kilometres of the European sites. Mitigation of the effects of **air and water quality** on

¹ <https://solent.birdaware.org/strategy>

European nature conservations sites are also dealt with separately and not covered by this SPD.

recreation on the New Forest European sites and enabling future refinements of mitigation policies and measures)².

2.6 Local Plan 2016-2036 Part 1 **Policy ENV1: Mitigating the impacts of development on International Nature Conservation sites** sets out the broad approach which will be applied to residential development to secure appropriate mitigation of recreational impacts on the European sites from the development.

This document provides details of how this policy will be implemented and replaces the previous Mitigation Strategy adopted in June 2014. In particular the strategy sets out:

- the suite of measures either provided by or funded by residential development within the plan area over the plan period to provide the required mitigation of recreational impacts.
- design guidance of how on-site recreation mitigation should be provided by developers as part of new development.

2.7 Other relevant documents include the Habitats Regulations Assessment (HRA), the Infrastructure Delivery Plan (IDP), the Community Infrastructure Levy (CIL) Charging Schedule and the accompanying Infrastructure Funding Statement (IFS).

2.8 Mitigation measures set out in this strategy are directed towards:

- providing alternative recreational opportunities (to deflect potential visits away from the New Forest European Sites);
- managing and educating visitors (to change visitor behaviour including when visiting the designated sites); and
- monitoring of the impacts and effectiveness of mitigation measures (to provide a better understanding of the impacts of

Wider benefits arising from the need to mitigate

2.9 The delivery of mitigation strategy is fundamentally about restoring the 'status quo' in terms of impacts on the designated European sites. The requirements for achieving biodiversity net gain will be in addition to the measures set out in this strategy. However, in providing improvements to existing open space or creating new alternative recreational opportunities using a local approach strategy, there will also be direct benefits to residents.

2.10 The provision of a network of natural greenspaces located close to people's doorsteps will bring about 'quality of life' opportunities, such as healthier lifestyles, becoming more in touch with nature, space for wildlife and natural habitat, and improve attractiveness. This in turn also enables the Council to deliver greener growth that contributes towards the delivery of environmental net gain³ in the Plan Area.

2.11 New areas of Alternative Natural Recreational Greenspace (ANRG) will also provide opportunities for physical activity (with benefits to reducing obesity levels and improving mental health), as well reducing the need to travel, thus providing benefits to climate change including carbon reduction and air quality. Its close proximity to the new development, and the fact that sites are providing up to 50% affordable housing will also ensure greater access to green spaces is provided to those on lower incomes or with limited mobility.

² The assumption is made that the measures set out in this strategy will provide effective mitigation. However, that is yet to be proven.

³ See Local Plan 2016-2036 Part 1: Planning Strategy - Policy STR1: Achieving sustainable development

- 2.12 The environmental benefits through the creation and landscaping of the ANRGs on a new development, when also combined with the wider open space provision, will further assist in addressing climate change, water quality and an overall improvement to the ecological value on the site.
- 2.13 An importance part of this strategy is to also undertake various initiatives to improve understanding of the impact visitors have on the New Forest protected European Sites and to encourage improved behaviours.
- 2.14 Projects delivered since the adoption of the 2014 Mitigation Strategy are already providing such benefits to residents, together with the delivery of advice and education services aimed at influencing visitor behaviour on protected European sites via the People and Wildlife ranger that is also provided by the strategy.
- 2.15 The main difference between this mitigation strategy and the mitigation strategy adopted in 2014 is that it now recognised that not all recreational visits to the New Forest European Sites will be deflected by mitigation measures to provide alternative natural greenspace for recreation. Some recreational use of the New Forest by residents will continue even if on-site recreational mitigation is provided, and therefore the requirement to provide for access and visitor management, via communication and education provision is extended to all residential development.
- 2.16 Addressing the impacts of local resident's recreational use of the Southampton Water and Solent Coast European Sites is dealt with by the separate **Solent Recreation Mitigation Strategy**⁴.

⁴ <https://solent.birdaware.org/strategy>

⁵ Council Directive 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora can be viewed at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:31992L0043:EN:HTML>

Requirements of the Conservation of Habitats and Species Regulations

- 2.17 The UK exited the EU on 31 January 2020 and at the time of writing there is a transition period during which EU legislation will be followed. It is currently anticipated that the Conservation of Habitats and Species Regulations 2017 (as amended) referred to in this section, and which transpose the EU Habitats Directive (92/43/EEC) will continue to have the same working effect as now after the transition period.
- 2.18 Article 6 of the Habitats Directive (92/43/EEC)⁵ requires all EU Member States to undertake an 'appropriate assessment' of any plan or project requiring authorisation which would be likely to have a significant effect upon a European site; this is commonly referred to as a Habitats Regulations Assessment (HRA). This assessment must demonstrate that based on the best available scientific information, and in light of any suitable mitigation measures, the plan or project would not adversely affect the integrity of the site either alone or in combination with other plans or projects. A precautionary approach must be adopted in HRA, and where a loss of site integrity cannot be ruled out the plan or project may only be authorised under very exceptional circumstances.
- 2.19 In the UK the Habitats Directive has been transposed into domestic legislation as the Conservation of Habitats and Species Regulations 2017⁶, and the provisions of Article 6 are largely satisfied by Regulation 61 and Government Circular 06/2005 which establishes the statutory obligations for HRA alongside the

⁶ The Conservation of Habitats and Species Regulations 2017 can be viewed at: <https://www.legislation.gov.uk/ukxi/2017/1012/contents/made>

European Commission's guidance. The Conservation of Habitats and Species Regulations confirms the responsibility of all local planning authorities as 'competent authorities', requiring them to carry out HRA of all relevant planning applications and Local Development Documents.

- 2.20 Under Article 6(3) of the Habitats Directive, Competent Authorities have a duty to ensure that all the activities they regulate have no adverse effect on the integrity of any of the Natura 2000 sites (together SPAs and SACs make up the network of Natura 2000 sites). Therefore, the Council (the Competent Authority) must assess the possible effects of a plan or project on any Natura 2000 site. This includes an initial screening stage to identify any likely significant effects on the European site which may arise, either alone or in combination with other plans or projects. If at the screening stage it is considered that there is likely to be a significant effect, in view of the site's conservation objectives, then the plan or project must be subject to an Appropriate Assessment (AA). Having undertaken the AA, the Council shall agree to the plan or project only after ascertaining that it will not adversely affect the integrity of the European site concerned, or where the further tests as described in article 6(4) can be met.
- 2.21 The decision-maker must consider the likely and reasonably foreseeable effects in order to ascertain that the proposal will not have an adverse effect on the integrity of the site before it may grant permission (subject to the exception tests set out in Regulation 61 of the Conservation of Habitats and Species Regulations).

- 2.22 As an integral part of the Council's pre-application process, it requires close working with Natural England in order to obtain the necessary information, agree the process, outcomes and mitigation proposals, and to meet the requirements of the Conservation of Habitats and Species Regulations. However, it is ultimately the decision-maker on planning matters that is responsible for ensuring compliance of its decision with the legislation and regulations.
- 2.23 The Council's approach to recreation mitigation has only been in operation for a short period (since 2014) and there is therefore a need to monitor its effectiveness.
- 2.24 Following the ruling by the Court of Justice of the European Union (CJEU) in April 2018⁷, development likely to have an impact on a European Site, will need to be subject to Appropriate Assessment (AA) at detailed planning stage (planning application). The AA will be able to take into account the provision of mitigation measures which will be secured as part of the development, by direct provision of through a combination of Community Infrastructure Levy and/or Section 106 Agreement. Provision of mitigation in accordance with Local Plan 2016-2036 Part 1 Policy ENV1 and this SPD, will normally be considered to provide the required mitigation.
- 2.25 Failure to provide appropriate mitigation will result in non-compliance with the Conservation of Habitats and Species Regulations and the proposed development may not proceed as it will be in breach of the Habitats Regulation. Compliance with Policy ENV1 and this strategy ensures appropriate mitigation is provided.

7

<http://curia.europa.eu/juris/document/document.jsf?jsessionid=9ea7d2dc30dd1db017d2>

[7fb646d08d1eb2eadcb4183d.e34KaxiLc3qMb40Rch0SaxyNchn0?text=&docid=200970&pageIndex=0&doclang=EN&mode=lst&dir=&occ=first&part=1&cid=478560](https://www.newforest.gov.uk/Document/Document.aspx?docid=200970&pageIndex=0&doclang=EN&mode=lst&dir=&occ=first&part=1&cid=478560)

Residential developments required to mitigate

- 2.26 The mitigation requirements for residential development and the provision of overnight visitor accommodation apply to all forms of new residential development (including those permitted via prior approval and permitted development) resulting in the net gain of a self-contained dwelling and include:

New build, redevelopment, mixed use schemes, changes of use, conversions, affordable housing, sheltered housing, extra care housing, second homes, visitor accommodation (including increases in overnight accommodation bed spaces and campsite pitches, for example), gypsy and travellers pitches.

- 2.27 Where it is unclear whether or not the mitigation requirements apply to a particular form of development, an appropriate assessment may be required as part of the Council's local planning authority function, which may involve seeking advice from Natural England.
- 2.28 Mitigation measures are required for net additions to residential accommodation stock. They are not normally required for replacement dwellings or extensions to an existing dwelling (which do not result in the formation of additional residential units or a significant increase in resident occupancy).

Residential development not requiring the submission of a planning application

- 2.29 In recent years, changes have been made to the General Permitted Development Order (GPDO) which allow, in certain circumstances, new dwellings to be developed without the need to apply for planning permission, having defined them under the GPDO as 'permitted development'. However, in such circumstances the proposed development must still comply with the Conservation of Habitats and Species Regulations 2017 (as amended) (Habitat Regulations).
- 2.30 The Habitat Regulations require that any development granted planning permission by a GDPO, which is likely to have a significant effect on a European site (either alone or in combination with other plans or projects), must not be begun until the developer has received written notification of approval of the local planning authority that the proposals will not have an adverse impact on the integrity of a European site. Within the plan area this will require the provision of appropriate mitigation measures to address adverse impacts of the development on the European sites.
- 2.31 Accordingly, compliance with the Habitat Regulations can be secured as part of the 'prior notification' process in a similar way to residential development that requires planning permission accompanied with developer contributions.

Visitor Accommodation

- 2.32 Additional visitor accommodation within the Plan Area will have a similar recreational impact on the designated nature conservation sites in the New Forest as residential development. It will therefore

be necessary for developments which will increase overnight stays within the plan area to mitigate their impacts.

- 2.33 The recreational mitigation contribution will be based on occupancy and the basis of net increase in visitor accommodation in the same way as new residential development, with each new room or unit of accommodation considered as a 1 bedroom residential flat in terms of contribution level. This will be adjusted to reflect that visitor accommodation is not always fully occupied throughout the year.
- 2.34 For hotel accommodation, a contribution will be sought for each additional bedroom for new, or extensions to, hotels and other serviced visitor accommodation, and will be based on a proportion of a 1 new bedroom dwelling, as contained in Table 11 of this SPD. The proportion will be based on the highest annual occupancy level⁸ unless clear evidence is provided to justify a different level.
- 2.35 For other types of visitor accommodation, such as camping and caravan pitches and self-catering, the contribution level will be determined on a pro-rata basis supported by robust evidence provided for the period the accommodation type is open throughout the year.
- 2.36 Hotels and other forms of visitor accommodation will normally be expected to provide contributions only rather than on-site mitigation, regardless of the size being proposed delivers a net gain of over or under 50 units.
- 2.37 Although most visitor accommodation will host visitors that come to the New Forest designated European sites for recreation, it is

acknowledged that in a few exceptions some are focused on business users. The Council will consider the need for mitigation and the level of contribution in these exceptional circumstances on a case by case basis.

Appropriate Mitigation Measures to address adverse impacts of the European sites

Natura 2000 sites

- 2.38 The Plan Area includes and is close to a number of Natura 2000 sites. Details of international and European nature conservation sites are set out in in the Habitats Regulation Assessment (HRA)⁹ prepared for the Local Plan. However, the HRA screening has identified the ‘New Forest European sites’ and the ‘Southampton Water and Solent Coast European sites’ as protected sites where mitigation measures are required to address the effects of the Plan in relation to recreational impacts. This SPD specifically addresses the impacts on the New Forest European Sites.

New Forest European Sites

- 2.39 As established when preparing the current Local Plan, a review of published work indicated that although the evidence is inconclusive, adopting the precautionary approach, reliance could be placed on the mitigation provided by Policy ENV1 and the Recreational Mitigation Strategy to adequately mitigate potential recreation pressure from development proposed though the Local Plan and that adverse effects on integrity due

⁸ Highest annual level of bedroom occupancy for England in the last 5 years is 78%, as recorded by Visit Britain

⁹ <https://www.newforest.gov.uk/article/1510/Local-Plan-2016-2036-part-1-Planning-strategy>

to recreation pressure can be ruled out for all European sites both alone and in combination.

2.40 The Footprint Ecology Report “Changing patterns of visitor numbers within the New Forest” (2008) ¹⁰ emphasised the need to tailor a package of mitigation measures to the unique nature of the New Forest and its visitor patterns but also points out that, the large area of land, existing expertise in access management, and an infrastructure already geared to cope with large numbers of visitors provide a good starting point. Suggested mitigation measures comprise:

- A monitoring strategy – detailed field work to understand low densities of the three indicator species (nightjar, woodlark and Dartford warbler); regular monitoring of other key species and locations where there are concerns about recreational pressure; annual monitoring of visitor levels; monitoring of changes in visitor patterns associated with access management measures.
- Refinement of visitor models – accounting for the spatial distribution of paths and points of interest within the New Forest; incorporating actual route data; exploring the spatial distribution of other species to predicted visitor pressure.
- Car-parking – managing car parking to re-distribute visitors.
- Access and visitor management measures - promotion of less sensitive areas to visitors; provision of interpretation and path enhancement in less sensitive areas; promotion of issues such as the need to keep dogs on leads.
- Alternative greenspace – the report states that any alternative greenspace must be very carefully considered in terms of its

ability to attract people who would otherwise visit the New Forest.

2.41 It concludes that the visitors who are likely to be the easiest to divert from the New Forest are those who do not stay overnight and that potential alternative greenspaces need to be located closer to development areas than the sensitive site to be protected. Sites to attract dog walkers should provide safe off-road parking, a range of routes, and be in locations perceived to maximise enjoyment of the dog.

2.42 Regard has been had to these principles in preparing this strategy.

2.43 Footprint Ecology were further commissioned by Test Valley Borough Council on behalf of a partnership which also included Eastleigh Borough Council, New Forest District Council, The New Forest National Park Authority, Southampton City Council and Wiltshire Council. The ‘New Forest Visitor Study’¹¹ series of reports were commissioned to increase understanding the impacts of recreation (arising from new housing development) on the New Forest designated European sites. The project as a whole involved visitor surveys combined with work to understand the impacts of recreation and relevant mitigation approaches. This also addressed a recommendation in the earlier “Changing patterns of visitor numbers within the New Forest” report. The series of reports were produced in 2020:

- *Recreation use of the New Forest SAC/SPA/Ramsar: New Forest visitor survey 2018/19* - results of on-site face-face interviews with visitors conducted at formal car parks and other locations across the New Forest SAC/SPA/Ramsar;

¹⁰ <https://www.footprint-ecology.co.uk/reports/Sharp%20et%20al.%20-%202008%20-%20Changing%20patterns%20of%20visitor%20numbers%20within%20the%20Ne.pdf>

¹¹ <https://www.newforestnpa.gov.uk/conservation/managing-recreation/future-forest/research-into-recreational-use-of-the-new-forests-protected-habitats-footprint-ecology-2020/>

- *Recreation use of the New Forest SAC/SPA/Ramsar: New Forest vehicle counts 2018/19* – results of vehicle counts across the New Forest SAC/SPA/Ramsar car parks, counting all parked vehicles on a range of different dates over a year;
- *Recreation use of the New Forest SAC/SPA/Ramsar: Results of a telephone survey with people living within 25km* - the results of a telephone survey with 2,000 residents living within a 25km radius of the woodland/heathland areas of the New Forest SAC/SPA/Ramsar;
- *Recreation use of the New Forest SAC/SPA/Ramsar: Impacts of recreation and potential mitigation approaches* – sets out the impacts of recreation and provides options for mitigation and avoidance.
- *Recreation use of the New Forest SAC/SPA/Ramsar: Overview of visitor results and implications of housing change on visitor numbers* - brings together the information from three separate surveys undertaken across the New Forest SAC/SPA/Ramsar in 2018/19. This predicts an increase of around 11.4% in the number of visits as a result of new housing within 25km radius over the period 2018-2036.

2.44 The telephone survey is significant in understanding how frequently local residents visit the woodland and heathland areas of the New Forest. The survey engaged with 2,000 randomly selected residents from areas surrounding the New Forest. Interviewees lived within 25km of the New Forest designated sites and sampling was undertaken within 5km bands. Sampling was weighted to the nearer 5km bands to ensure more interviews were conducted with those living relatively close to the New Forest. The questionnaire identified households who had visited the New Forest and asked particular questions relating to the reasons for visiting, activities undertaken and their visit patterns.

- 2.45 Across all interviewees, the average number of visits to the New Forest woodland heathland was around 48 per year per household (includes those who don't visit the New Forest at all). The average for those that do visit the New Forest woodland and heathland was 72 visits per year per household.
- 2.46 Overall, the results of this New Forest Visitor Study did not indicate a need for a revised approach to mitigation in this Council's planning area (the district outside of the National Park). However, the studies provided valuable information about the nature of the recreational use of the New Forest by residents and this information will assist in refining the design and implementation of the mitigation projects.
- 2.47 It also emphasised the importance to continue to collaborate with adjoining Authorities in the development of a strategic, proportionate and co-ordinated approach to mitigation of recreational impacts on the New Forest in a wider geographical area.

Alternative approaches to recreation mitigation

- 2.48 As set out in the Local Plan 2016-2036 Part 1 (supporting text to Policy ENV1), should an alternative approach to mitigation be proposed, evidence will be needed to demonstrate its effectiveness. It will need to be evaluated by the 'competent authority' (the decision-making authority) through an Appropriate Assessment process. Such evaluation will need to take account of the precautionary principle applying to such judgements. The developer will be required to provide the local planning authority with appropriate evidence of the effectiveness of any alternative approach to mitigation of recreational impacts.

2.49 Any alternative proposal would need to mitigate the impact of the development to no less a degree as would be achieved by implementation of the requirements of Local Plan Policy ENV1 (as amplified in this SPD) and demonstrate its likely effectiveness in perpetuity. The Council would require the proposal to be robustly justified with evidence.

Sustainability Appraisal of this document

2.50 Plans and programmes that have been determined to require Appropriate Assessment pursuant to the Habitats Directive are also subject to an assessment procedure under the Strategic Environmental Assessment (SEA) Directive (Article 3(2) (b)). The UK exited the EU on 31 January 2020 and at the time of writing there is a transition period during which EU legislation will be followed. It is currently anticipated that the Environmental Assessment of Plans and Programmes Regulations 2004 which implements this EU SEA Directive will continue to have the same working effect as now after the transition period. A full Sustainability Appraisal has been undertaken on the Local Plan. It is not required for this document.

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3.0 Local Plan Policies and other relevant documents

Local Plan 2016-2036

- 3.1 This document is a supplementary planning document to support the Local Plan 2016-2036 Part 1: Planning Strategy
- 3.2 The Local Plan 2016-2036 provides for 10,420 additional dwellings to be built in the plan area, which includes existing commitments from the earlier Local Plan Part 2 (adopted in 2014).
- 3.3 Local Plan 2016-2036 Part 1: Planning Strategy (adopted July 2020) contains **Policy ENV1: Mitigating the impacts of development on International Nature Conservation sites**, which built on the previous habitat mitigation policy (Policy DM3 from the Local Plan Part 2: Sites and Development Management DPD adopted in 2014) by recognising that because of the strong draw of the New Forest National Park, in particular, all new residential development is required to make a contribution to the access and visitor management of the New Forest European Sites and Southampton Water and Solent Coast European Sites as additional visits to the European sites will continue to be made. The policy also clarifies that the informal open space required to be provided under saved Policy CS7 is wholly additional to the mitigation land required under Policy ENV1.
- 3.4 This policy together with **Saved Policy DM2: Nature conservation, biodiversity and geodiversity** are specifically directed to securing appropriate mitigation of the impact of the development on the European nature conservation sites. The policy wording is reproduced in Appendix 1.

Habitats Regulation Assessment

- 3.5 The Council, advised by Land Use Consultants (LUC), has worked with Natural England, the New Forest National Park Authority, the Hampshire and Isle of Wight Wildlife Trust and the Royal Society for the Protection of Birds, to develop an effective strategy for the mitigation of possible recreational impacts on the European nature conservation sites from residential development planned within the plan area over the plan period.
- 3.6 A review of available evidence shows a lack of conclusive evidence regarding the impact of recreation activities on designated features at the New Forest European sites, and it is not possible to isolate the impacts arising from development in this Plan from the in combination effect of growth in the wider sub region.
- 3.7 In respect of the New Forest European sites, LUC's review of evidence has however confirmed that whilst evidence of significant adverse effects from recreation is inconclusive, reliance can be placed on the mitigation provided by Policy ENV1, the New Forest (outside of the National Park) Recreational Mitigation Strategy, and the Solent Recreation Mitigation Strategy to adequately mitigate potential recreation pressure from development proposed by the Local Plan Part 1 and that adverse effects on integrity due to recreation pressure can be ruled out for all European sites both alone and in combination.
- 3.8 The provision of alternative natural recreational greenspace, integral to new residential development, may contribute to the mitigation of the potential effects on both for both the Southampton Water and Solent Coast and New Forest European Sites, since its provision will divert the same new residents from either European site. However, whilst the HRA makes this conclusion, strategic

mitigation measures for the New Forest sites and Solent sites remain separate and both need to be adhered to as appropriate to ensure compliance with Habitat Regulations. The impacts on the Solent Coast sites are specifically addressed through the Solent Recreation Mitigation Strategy.

Infrastructure Delivery Plan

- 3.9 As part of the preparation of the Local Plan review an Infrastructure Delivery Plan (IDP) was prepared. The IDP identifies the new infrastructure required to mitigate the impacts of the new development.
- 3.10 The IDP also identifies the likely cost and funding source for each type of infrastructure where known.
- 3.11 The IDP highlights mitigation projects as a critical delivery priority.

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4.0 Recreation Mitigation requirements for new development

- 4.1 An agreed approach to mitigation of recreational impacts on the New Forest and Southampton Water and Solent Coast European sites arising from new residential development was established in Local Plan Part 2: Sites and Development Management document and its supporting Mitigation Strategy for European Sites SPD in 2014. This approach was updated and further endorsed through the examination and adoption of the Local Plan 2016-2036 Part 1: Planning Strategy (July 2020)
- 4.2 It was agreed that for the New Forest District (outside the National Park) there needed to be a number of components to the mitigation approach. It was recognised that 'the New Forest' is such a strong draw for recreational visits, that an effective mitigation strategy needs to not only consider providing alternative recreation opportunities accessible to local residents – effectively close to people's doorsteps, but to also effectively manage and minimise the potential harmful effects of the visits that cannot be deflected away from the New Forest European sites. It was therefore recognised that there is a need for both the provision of alternative recreational opportunities in a natural environment and also management of access to the European sites.
- 4.3 **The components of this mitigation strategy which are appropriate in the context of the New Forest European sites are identified as:**

- **Provision of new alternative natural recreational greenspaces on new development sites of over 50 dwellings;**
- **Improvement and enhancement of existing green spaces as recreational mitigation;**
- **Enhancement of recreational walking routes;**
- **Access management (including dedicated rangering delivering education initiatives, communication and initiatives to encourage responsible dog walking).**

- 4.4 Where new residential development is proposed within 5.6km of the Southampton Water and Solent Coast European Sites, the **Solent Recreational Mitigation Strategy** must also be complied with.

Calculating the recreational mitigation required

- 4.5 In order to calculate the number of visits that are required to be mitigated, the Council have used the latest Footprint Ecology¹² study which demonstrated that the estimated visits per household per year (on average) to the designated New Forest European sites by New Forest District residents is 72.
- 4.6 The calculations undertaken are based on the allocated homes in the Local Plan 2016-2036 Part 1, set out Policy STR5. To take account of the precautionary principle, in some instances an additional 20% buffer has been applied to allow for where estimated site housing mix / densities (capacities) may exceed those set out in the adopted Local Plan and the council's Strategic Housing Land Availability Assessment (SHLAA).

¹² Recreation use of the New Forest SPA/SAC/Ramsar: New Forest visitor survey 2018/19 (April 2020)
Overview of visitor results and implications of housing change on visitor numbers (April 2020)

New Forest visitor survey 2018/19 (2020)
Results of a telephone survey with people living within 25km (2020)

- 4.7 The suite of mitigation proposed through the requirements of Policy ENV1 and this strategy aims to ensure that the Local Plan avoids adverse effects on the integrity of the European sites if the estimated recreation pressure from 165,240 additional visits from new housing development not providing on-site mitigation within the plan area is offset, regardless of who makes those visits.
- 4.8 This SPD sets out development requiring mitigation for each sub-area of the Plan Area, using the housing requirement set out in Local Plan Policy STR5 and taking in to account development that is already completed during the Plan period.
- 4.9 Additional pressures will be put on the New Forest European sites from the growth planned in neighbouring planning authority areas. Addressing and mitigating these additional recreational impacts on the New Forest arising from outside this plan area are a matter for the relevant planning authorities in the preparation of their Local Plans.

Provision of alternative natural recreational greenspace on new developments over 50 net additional dwellings

- 4.10 Alternative natural recreational greenspace (ANRG) will form a key element of the mitigation strategy and provision for 8ha per 1,000 of population of new residential development is a requirement for sites over 50 dwellings as set out in Local Plan Policy ENV1.
- 4.11 The detailed principles for how alternative natural recreational greenspace and open spaces should be incorporated within development sites is set out in Appendix 4. This guidance

provides an approach to delivering mitigation to meet the requirement of the Habitat Regulations¹³, which has been agreed with Natural England and used throughout the preparation of the Local Plan Strategic Site concept master plans.

- 4.12 As referred to in the Local Plan and earlier in this SPD, alternative approaches to recreational impact mitigation may be put forward, but they must fulfil the requirements of the Habitat Regulations and demonstrate their effectiveness. Supporting text to Policy ENV1 sets also out for situations where ANRG is proposed on smaller individual sites within a larger strategic site, to ensure that the delivery of ANRG is concurrent with the overall housing delivery of the site. Provided that there is an appropriate design solution and enforceable landowner agreements are in place relating to the quantum, location and timing of provision, ANRG provision need not be on the planning application development parcel itself and may be located elsewhere within the wider development.
- 4.13 Key features of well-designed alternative natural recreational greenspaces (ANRGs) will include, but are not limited to:
- It should be considered and laid out as an integral part of the fabric of new development, forming a major part of a network of green space and the green setting for new residential development.
 - A network of appropriately sized spaces across the site which provide the opportunity to experience and enjoy a natural environment close to people's homes, to deflect visits away from the New Forest designated European sites
 - Safe pedestrian connections with residential areas;

¹³ Local Plan Review Examination Document - SCG05 Recreational Mitigation SoCG with Natural England

- Linkages / connectivity with other open spaces and walking routes;
- Provision of attractive walking routes with appropriately surfaced paths;
- Accessible for dog-walking with provision of safe areas for dogs to be let off leads, including secure boundaries against nearby roads, and special features to attract dog-walkers to the area, such as dog activity areas or trails;
- Retention, enhancement and creation of a variety of habitats to ensure a net increase in biodiversity;
- Seating areas;
- Provision of bins appropriate for litter and dog-waste;
- Clear signage, and interpretation, appropriately located;
- Ongoing land management.

Provision of off-site recreation mitigation projects for new developments of less than 50 dwellings

- 4.14 Where on-site recreation mitigation is not provided a financial contribution will be sought towards the provision of new and enhancement of existing green spaces and recreational walking routes including provision for their long-term maintenance and management costs. These will need to mitigate the additional visits identified in this SPD.
- 4.15 To ensure the programme of projects is responsive to changing circumstances and opportunities, the programme of specific projects will be maintained and published separately. This ensures it can be reviewed regularly to allow a 5-year rolling programme of projects for implementation to be sustained, and to specifically ensure that:
- projects are deliverable in the agreed timeframe;

- projects come forward at times and locations around the District reflecting the current trajectory of predicted housing delivery;
- it is possible to react to monitoring regarding the success of existing projects and further refinements in the evidence of the visitor impact on the designated New Forest sites.

- 4.16 The rolling supply of projects will be maintained by the Council for the duration of the plan period, which will be reviewed and agreed annually.

Enhancement of existing green spaces as alternative natural recreational greenspace

- 4.17 Whether provided from land in other uses, or through improving the accessibility and recreational functionality of existing open spaces, to provide successful mitigation open spaces will need to be designed so as to maximise their chances of diverting New Forest District residents who might otherwise visit the European sites for outdoor recreation, particularly for those activities most likely to cause disturbance of designated features, such as dog walking. Evidence for the New Forest European sites suggests that alternative natural recreational greenspace should particularly target the needs of New Forest District residents who wish to go for recreational walks, with or without a dog.

Enhancement of Recreational Walking Routes

- 4.18 There is an extensive Public Right of Way (PRoW) network across the whole of the Plan Area, including in close proximity to the strategic residential development allocations in the Local Plan 2016-2036. Their use could be enhanced by improving the condition of and signage of these routes. In addition there is an opportunity to enhance the network by improving the infrastructure

such as providing way marking information / interpretation boards, benches, dog waste bins and dog exercise areas / trails, and improving accessibility by replacing stiles with gates, along routes, and improving connections between parts of the PRoW network. These improvements will make the use of these routes more attractive and encourage more frequent use by new (and existing) residents, as an alternative to visiting the New Forest European site for a walk, with or without a dog.

4.19 The walking route proposals include a mix of land ownership, some are on publicly owned land with public access, and others involve PRoW's across private land, but all form part of the existing network of walking routes. The District Council will work in partnership with the Hampshire County Council Countryside Access Team to implement the identified walking routes in order to meet the objectives of this mitigation strategy and Hampshire County Council's Countryside Access Plan.

4.20 Improvements to recreational walking routes are set out in Appendix 3 will involve the following, as appropriate:

- Surfacing to encourage multi-user and year round availability;
- Improving accessibility (such as the type of gate used), including for dog walkers;
- Providing seating;
- Clearing encroaching and overhanging vegetation;
- Provide, repair/replace waste bins as necessary;
- Enhancing planting/biodiversity interest along routes;
- Installation of interpretation boards;
- Providing information to the local community about recreational walking routes in their area.

4.21 In addition to providing alternative recreation opportunities on and off site, it is also important to modify inappropriate visitor behaviour when using the New Forest European sites so as to reduce the potentially harmful recreational impacts. The employment of wildlife rangers has a significant role to play in the delivery of such measures. In 2015, a 'People and Wildlife' Ranger role was established by New Forest District Council and this plays a valuable role. However, it is recognised that this is one of a number of initiatives, the Council continue to monitor the situation.

4.22 Other visitor management measures could include; producing information and guidance leaflets for residents on new developments, including promotion of 'alternative' locations, interpretation boards, the introduction of regulations to control harmful behaviours, such as dog control areas within the European sites, and the enforcement of such regulations.

4.23 The provision of the People and Wildlife Ranger is funded in perpetuity by developers' contributions from residential development in the New Forest District (outside the National Park) area.

Monitoring

4.24 The long-term effectiveness of mitigation measures is currently unknown. Assessment of the measures to adequately protect the European nature conservation sites from harmful recreational impacts will need to be carefully monitored and this will be an important aspect of the strategy in order to manage uncertainty and inform future refinement of direct mitigation measures.

4.25 It is important to monitor both the implementation of the proposed mitigation measures of the mitigation strategy and the effectiveness of those measures in mitigating the recreational

Access and Visitor Management

impacts of new residential development within the Plan area. Information from the monitoring process will inform future reviews of the Mitigation Strategy, and future discussions and decisions about the capacity of this area to accommodate further development without an adverse effect on the integrity of European sites. Monitoring will be funded by a standard charge towards its cost from each additional dwelling.

4.26 The Council’s Annual Monitoring Report (AMR) will be the principal document for reporting progress with the implementation of the Mitigation Strategy. The indicators in Table 1 will be used to determine the effectiveness of the strategy and the mitigation measures. Through the monitoring process the Council will ensure that appropriate mitigation measures are implemented in step with the development of new residential development. Priorities for the delivery of mitigation projects, triggered by the implementation of residential proposals, will be reflected in the Infrastructure Delivery Plan and Infrastructure Funding Statement (or future equivalent), which will be reviewed in association with the Annual Monitoring Report.

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Performance criteria	Accessible to potential users from new residential development	Encourages activities to take place outside SPA/SAC	Results in increased recreational capacity	Provides a natural environment enhances bio-diversity	Increases local opportunities for walking in a natural environment	Attractive to dog-walkers	Diverts visits from European sites	Modifies behaviour relating to visits to European sites	Reduces impacts from visits which continue to the European sites	Improves understanding of impacts and refinement of mitigation measures
alternative natural recreational greenspace within residential development	✓✓	✓	✓✓	✓✓	✓	✓	✓	✓	n.a	
Standalone alternative natural recreational greenspace	✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓	n.a	
Improvements to existing POS	✓	✓	✓	✓	✓	✓	✓	✓	n.a	
Enhancements of walking routes	✓✓	✓✓	✓	✓	✓✓	✓✓	✓✓	✓	n.a	
People and Wildlife Ranger-access management and education	n.a	✓	n.a	n.a	n.a	n.a	✓✓	✓✓	✓✓	✓✓
Monitoring of implementation of residential development and of mitigation measures	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	✓
Monitoring of the health of European designations	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	✓✓
Monitoring the use of use of alternative natural recreational greenspace and other mitigation projects	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	n.a	✓✓

Table 1 Performance of mitigation proposals

Monitoring the implementation of the Mitigation Strategy

- 4.27 The Council will monitor the implementation of development and the delivery of mitigation projects. The Council will be the co-ordinating body for the monitoring the use of alternative natural recreational greenspace and the performance of other mitigation projects within the Plan area. The Council will draw upon information available from other bodies which, for wider purposes, monitor the health and condition of the European designations, and visitor numbers and impacts on the designated sites (notably Natural England and the New Forest National Park Authority).
- 4.28 Through the development management process, the Council will ensure that the implementation of appropriate mitigation measures is co-ordinated with the delivery of residential development. Where alternative natural recreational greenspace is to be provided (at least in part) on-site, the alternative natural recreational greenspace must be available to the occupants of the new dwellings at the time of first occupation. The Council will work with developers to agree appropriate implementation schedules to ensure the appropriate mitigation is in place at the correct time.
- 4.29 The Council will programme off-site mitigations projects according to location and rates of residential development. Priority areas for implementation of mitigation projects will relate to the commencement new residential development, to ensure timely project delivery. Progress on the implementation of new residential development and mitigation measures will be published as part of the Council's Annual Monitoring Report.

Monitoring the effectiveness of the Mitigation Strategy

- 4.30 Appendix 2 sets out the arrangements for monitoring how successful the identified mitigation measures are. It will look at how successful the alternative natural recreational greenspace

and other mitigation projects are in attracting use and deflecting potential visits away from the European sites.

- 4.31 The monitoring of the condition of the European sites themselves will also be important, and this should acknowledge the much wider range of influences that affect the condition of these sensitive sites as well as the impacts attributable to visitor activities.
- 4.32 Evidence relating to indicator bird populations and of recreational activity levels within the European sites will also be considered.
- 4.33 Monitoring of the impact of mitigation measures will assist in reviewing the strategy if necessary. Monitoring is crucial in providing a method of adjusting the mitigation measures to increase their effectiveness and maximise benefits. The Council expects that the whole strategy will be reviewed for its effectiveness at least every 5 years or sooner if new evidence emerges or monitoring results indicate a more urgent review is required. Monitoring will reveal whether the level of mitigation proposed in this strategy is adequate and whether or not the strategy needs to be revised.
- 4.34 Under the Community Infrastructure Levy (CIL) Regulations the Council is required to track and record where specific funds are used and this will be set out in the Infrastructure Funding Statement or future equivalent.

Working with others

- 4.35 Local Authorities, other than this District Council, who are within the zone of influence of the New Forest European sites have recognised the need to co-operate in taking a strategic approach to ensure significant effects are avoided.

- 4.36 The Council will also work closely with agencies such as the Forestry Commission and the New Forest National Park Authority to explore options for implementing other areas of work on access management, including relevant projects within the New Forest National Park Recreational Management Strategy and the overarching Partnership Plan.
- 4.37 The Council is part of the 'Bird Aware Solent' partnership, the **Solent Recreational Mitigation Strategy** was adopted in December 2017. This project specifically provides mitigation for the Southampton Water and Solent Coast European sites 5.6 km zone of influence.
- 4.38 There is an overlap in the areas and populations served by both the People and Wildlife Ranger and the Bird Aware Ranger. Opportunities have been taken to encourage co-operative and co-ordinated working.

Transfer of land

- 4.39 Natural recreational greenspace land provided for mitigation purposes must be secured for its intended purpose in perpetuity. To secure the long term availability to the public, the land shall normally be transferred freehold to the District Council, for the purpose of public open space, at nil cost to the Council. Provision will also need to be secured through the planning permission for future management, maintenance and monitoring of the alternative natural recreational greenspace in perpetuity¹⁴.

¹⁴ For the purposes of this strategy, in perpetuity is defined as 80 years. Natural England have accepted this definition.

¹⁵ Any legal agreement will contain obligations to ensure free and unrestricted access and, where appropriate, will require the land owner to work with Hampshire County

- 4.40 The following options may be considered where they are secured in perpetuity by a legal agreement¹⁵.
- 1st alternative - the land is transferred to a charitable body, such as the Hampshire and Isle of Wight Wildlife Trust (HIWWT).
 - 2nd alternative: where land remains in private ownership, a Management Company will need to be set up to ensure long term management and availability of the land for the purpose of publicly accessible natural green space in the public interest and in perpetuity.

Mitigation for brownfield land site development in urban areas

- 4.41 In some instances, it will not be possible to provide recreational mitigation on-site for example the redevelopment of brownfield sites of 50 or more homes in existing built up areas on unidentified sites. These sites will be required to make an equivalent provision to the policy requirement off-site, in a location agreed with the Council. Contributions to access management and monitoring will also be required. Appropriate mitigation proposals will need to be identified at the planning application stage and form part of the planning application.

Council to secure a dedication as a rights of way route. The legal agreement will contain clauses for a financial penalty should the Council be forced to intervene if the required access is not maintained.

Opportunities for alternative recreational mitigation projects

- 4.42 Some projects are directly related to specific residential development allocations and will be implemented in association with those developments. Other mitigation projects which have been identified will be funded by developers' contributions towards their implementation.
- 4.43 It is recognised that where mitigation projects identified by the Council (as published separately to this SPD) are not directly related to a specific residential development, alternative mitigation projects may be as effective in delivering the required recreational mitigation measures. The mitigation strategy gives scope for 'alternative' mitigation projects to be considered and suggestions for alternative projects will be considered, evaluated for effectiveness and where appropriate added to the programme of mitigation projects. This improves the overall effectiveness of the strategy as it will enable 'substitute' projects to be found for those identified projects where delivery proves more problematic. It is anticipated this will be achieved through the annual review of projects and implementation priorities, unless there is time limiting reason as to why it would need to be considered sooner.
- 4.44 The following criteria can be used to assess alternative recreational mitigation land and recreational routes projects, which any recreational mitigation projects would be expected to meet. These are:
- The proposal must provide an attractive natural green space or recreational walking route of an appropriate scale to be effective in diverting potential visits away from the New Forest European designation;

- Provision made for its long term management in a suitable condition for free public access;
- The proposals should be well connected to and in close proximity the residential development it is designed to attract visits from;
- The proposal should be welcoming and safe for users;
- The proposal should provide or make a significant contribution to a recreational walking route, accessible from residential areas, possibly by linking the existing network of PRowWs. A circular route of at least 2.3 km is desirable;
- Routes and open spaces should be clearly sign-posted or way-marked;
- Access by the public must be unrestricted and there should be opportunities for dogs to exercise freely and safely off lead;
- Paths should be well maintained and useable throughout the year. Where appropriate, discussions should be held with Hampshire County Council regarding dedicating routes as a Public Right of Way.

5.0 The delivery of alternative natural recreational greenspace through strategic site allocations in the Local Plan

- 5.1 Sites of 50 net additional dwellings or more are required to provide ANRG to mitigate the recreational impacts on the New Forest European sites to a standard of no less than 8ha per 1,000 population. One ha of land is likely to be the minimum size land that can be designed to function independently as ANRG and provision must be available for new occupants of the development at the time of first occupation.
- 5.2 The implementation of this policy will result in the creation of significant new areas of local publicly accessible green space. The exact amount of ANRG that will be provided by a development on-site will be determined at the planning application stage, with the quantity of space calculated based on the estimated population of a development.

All tenures (beds)	Assumed occupancy (persons)
1 bedroom	1.4
2 bedroom	2.1
3 bedroom	3
4 bedroom	3.75

Table 2 Assumed occupancy rate for dwelling size

- 5.3 The population of a new development will be estimated using the assumptions on occupancy set out in Table 2. (These estimates have been derived from HCC Home Movers Survey 2010). The following are four worked examples of the amount of recreation mitigation that would be required on a 100 dwelling scheme depending on the mix of housing that is required:

General SHMA mix (Local Plan Supporting Text)		
Type	No.	Occupancy
1 bed	9	13
2 bed	38	79
3 bed	37	111
4 bed	16	60
Total	100	263
Population Estimate: $(9 \times 1.4) + (38 \times 2.1) + (37 \times 3) + (16 \times 3.75) = 263$ persons (average occupancy – 2.63)		
On-site ANRG = $263 / 1,000 \times 8\text{ha} = 2.1\text{ha}$		
Mostly Small / Medium Bed dwellings		
Type	No.	Occupancy
1 bed	11	15
2 bed	52	109
3 bed	37	111
4 bed	-	-
Total	100	235
Population Estimate: $(11 \times 1.4) + (52 \times 2.1) + (37 \times 3) = 235$ persons		
On-site ANRG = $235 / 1,000 \times 8\text{ha} = 1.88\text{ha}$		
Mostly Medium / Large Bed dwellings		
Type	No.	Occupancy
1 bed	-	-
2 bed	30	63
3 bed	50	150
4 bed	20	75
Total	100	288
Population Estimate: $(30 \times 2.1) + (50 \times 3) + (20 \times 3.75) = 288$ persons		
On-site ANRG = $288 / 1,000 \times 8\text{ha} = 2.3\text{ha}$		
Mostly Large Bed dwellings		
Type	No.	Occupancy
1 bed	-	-
2 bed	10	21
3 bed	50	150
4 bed	40	150
Total	100	321
Population Estimate: $(10 \times 2.1) + (50 \times 3) + (40 \times 3.75) = 321$ persons		
On-site ANRG = $321 / 1,000 \times 8\text{ha} = 2.57\text{ha}$		

Table 3 Worked Examples for alternative natural recreational green spaces required

5.4 Table 4 lists all the strategic site allocations in the Local Plan 2016-2036 Part 1 and the likely size of the ANRG which could be required based on the occupancy which would result from the housing mix and site capacities set out in the Local Plan¹⁶.

Policy	Site Name	No. of dwellings	Estimate of ANRG requirement ¹⁷
Totton and the Waterside		3,230	
SS1	Land to the north of Totton	1,000	22 ha
SS2	Land south of Bury Road, Marchwood	700	18 ha
SS3	Land at Cork's Farm, Marchwood	150	4 ha
SS4	The former Fawley Power Station	1,380	35 ha
South Coastal Towns		945	
SS5	Land at Milford Road, Lymington	185	5 ha
SS6	Land to the east of Lower Pennington Lane, Lymington	100	2 ha
SS7	Land north of Manor Road, Milford on Sea	110	3 ha
SS8	Land at Hordle Lane, Hordle	160	3 ha
SS9	Land east of Everton Road, Hordle	100	3 ha
SS10	Land to the east of Brockhills Lane, New Milton	130	3 ha
SS11	Land to the south of Gore Road, New Milton	160	4 ha
Avon Valley		1,820	
SS12	Land to the south of Derritt Lane, Bransgore	100	4 ha
SS13	Land at Moortown Lane, Ringwood	480	12 ha
SS14	Land to the north of Hightown Road, Ringwood	270	12 ha
SS15	Land at Snails Lane, Ringwood	100	3 ha

Policy	Site Name	No. of dwellings	Estimate of ANRG requirement ¹⁷
SS16	Land to the north of Station Road, Ashford	140	5 ha
SS17	Land at Whitsbury Road, Fordingbridge	330	7 ha
SS18	Land at Burgate, Fordingbridge	400	11 ha

Table 4 Estimates of on-site ANRG to be provided

5.5 The following Tables 5, 6 and 7 summarise for each sub-area within the District the number of new dwellings expected to be built over the Plan period. The table gives a provisional estimate of the requirements for alternative natural recreational greenspace (ANRG) provision which will be needed by the strategic sites for that sub area over the Plan period. The table also sets out the number of visits which will need to be mitigated by off-site mitigation projects, for development yet to be built in the Plan period. An assumption is made for relevant development sites to add 20% uplift to cover variations in dwelling size in any given final development to address the precautionary principle.

¹⁶ Local Plan Part 1 2016-2036 Part One, Figure 6.1 – Indicative need for different sizes and tenure of homes, evidenced from SHMA 2014

¹⁷ These have been calculated using the mix of housing as evidenced from the SHMA 2014

Totton and the Waterside

No. of new dwellings completed or proposed (2014-2036) that provide their own on-site mitigation.	3,980
Local Plan Part 1 (2020) allocations:	SS1 - Land to the north of Totton (1,000) SS2 - Land south of Bury Road, Marchwood (700) SS3 - Land at Cork's Farm, Marchwood (150) SS4 - Former power station, Fawley (1,380)
Local Plan Part 2 (2014) remaining allocations:	TOT1 – Land at Durley Farm (80) TOT3 – Land at Hanger Farm (270) TOT11 – Eling Wharf (400)
Approximate ANRG land to be provided by Local Plan Part 1 sites (strategic sites) ¹⁸	79.3 ha
Proposed or committed dwellings that require off-site mitigation	894
Estimated number of visits per annum to mitigate (72 visit p.a. per household)	64,368

Table 5 Mitigation required Totton and the Waterside

The Coastal Settlements

No. of new dwellings completed or proposed (2014-2036) that provide their own on-site mitigation.	1,080
Local Plan Part 1 (2020) allocations:	SS5 – Land at Milford Road (185) SS6 – Land to east of Lower Pennington Lane (100) SS7 - Land north of Manor Road (110) SS8 - Land at Hordle Lane (160) SS9 – Land east of Everton Road, Hordle (100) SS10 – Land to the east of Brockhills Lane (130) SS11 – Land to the south of Gore Road (160)
Local Plan Part 2 (2014) remaining allocations:	NM5 - Land south of New Milton Station (75)
Neighbourhood Plan allocations:	NM5 - Land at Station Road/Spencer Road (60)
Approximate ANRG land to be provided by Local Plan Part 1 sites (strategic sites)	23.6 ha
Proposed or committed dwellings that require off-site mitigation	1,035
Estimated number of visits per annum to mitigate (72 visit p.a. per household)	74,520

Table 6 Mitigation required South Coastal Towns

¹⁸ These have been calculated using the mix of housing as evidenced from the SHMA 2014. See Local Plan examination document [EXAM12A](#) for detailed information

The Avon Valley and Downlands

No. of new dwellings completed or proposed (2014-2036) that provide their own on-site mitigation.	2,028
Local Plan Part 1 (2020) allocations:	SS12 - Land south of Derritt Lane (100) SS13 - Land at Moortown Lane, Ringwood (480) SS14 - Land north of Hightown Road, Ringwood (270) SS15 - Land at Snails Lane, Ringwood (100) SS16 - Land north of Station Road, Ashford (140) SS17 - Land at Whitsbury Road, Fordingbridge (330) SS18 - Land at Burgate, Fordingbridge (400)
Local Plan Part 2 (2014) remaining allocations:	RING3 – Land west of Crow Lane (45) <i>Note: 150 completed with on-site ANRG</i> FORD1 - Whitsbury Road, Fordingbridge (96) <i>Note: 49 completed with on-site ANRG</i>
Approximate ANRG land to be provided by Local Plan Part 1 sites (strategic sites)	51.5 ha
Proposed or committed dwellings that require off-site mitigation	366
Estimated number of visits per annum to mitigate (72 visit p.a. per household)	26,352

Table 7 Mitigation required Avon Valley

5.6 The Local Plan also contains a number of saved policies to provide new areas of publicly accessible green space which will contribute towards the mitigation strategy. These are set out in Table 8 below:

Parish	Policy Allocation Reference	Location	Likely natural green space size (ha)
Totton	TOT19	New Public open space north east of Bartley Park	4.23
	TOT20	Extension to public open space south of Bartley Park	1.49
Hythe and Dibden	HYD6	New Public open space south of Hardley Lane, west of Fawley Road	3.04
	HYD7	New public open space west of Lower Mullins Lane	0.8
New Milton	NMT11	New Public open space west of Fernhill Lane	0.3 - 0.62
	NMT12	New public open space south of Lymington Road, north of Chestnut Avenue	0.3

Table 8 saved recreation mitigation land Allocations in the Local Plan Part 2

5.7 In total, it is estimated that the strategic allocations made in the plan together with the allocations in Table 8 will provide around 160ha of additional publicly accessible green space which will not only provide a local recreation resource but also contribute towards the overall mitigation of recreational impacts.

5.8 An assumption has been made about the intensity of the use of the proposed mitigation land, based on work elsewhere, and assumes very modest use – working out at about 2.7 visitors per hectare provided per day. (Based on the standard provision of 8ha per 1000 head of population per annum). The Mitigation Strategy seeks to provide recreation mitigation land that is close to people's

homes and suitable for use throughout the year by everyone. The Council considers that it is likely that the ANRG provided in accordance with this strategy will perform better and provide a greater capacity for visits on existing natural green spaces used for the calculation of visits. Future monitoring will look at the performance of new, and existing but enhanced alternative natural recreational greenspaces.

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6.0 Implementation and Funding

Provision of on-site alternative natural recreational greenspace

- 6.1 Section 4 and accompanying appendices of this SPD sets out the detail for the mitigation requirements for new development, which are in accordance with Local Plan Policy ENV1. Developments of 50 or more net additional dwellings will be required to provide full alternative natural recreational greenspace (ANRG) provision on-site or directly adjoining the site, based on a standard of 8ha of ANRG per 1,000 population, and to fund the future management, maintenance and monitoring.
- 6.2 Implementation of on-site ANRGs must be completed and available for use by new residents on occupation of the first dwelling on the site, in proportion to the number of residents likely to occupy the number of homes completed.
- 6.3 The full detailed design and implementation of on-site ANRG will be agreed through the planning application. The ownership and management of the ANRG will be agreed as part of any planning permission granted and the agreed approach secured by a legal agreement.

Provision for continuing management and maintenance of on-site alternative natural recreational greenspace

- 6.4 Maintenance works will include routine management such as emptying waste bins, mowing, inspection and maintenance of trees, habitat management to achieve optimum biodiversity and footpath routes, together with other appropriate measures required to maintain the condition of the site in perpetuity, including, for

example, repair, maintenance and replacement of surfaces, furniture, structures and fencing.

- 6.5 As set out in section 4 of this SPD (Transfer of Land) the development will be expected to fund and provide for the future maintenance and management of the ANRG in perpetuity. This will be collected a commuted sum via a section 106 agreement.
- 6.6 The levels on commuted sum for the maintenance and management of ANRG will be monitored to ensure it is set at appropriate levels, and if necessary reviewed. In any event, the figures for on-site ANRG maintenance will be revised on the 6 April each year in line with the Retail Price Index (RPI) with April 2020 being the base year.

Monitoring of on-site compliance

- 6.7 The implementation of on-site ANRG will be monitored to ensure that it is provided to an appropriate standard.
- 6.8 A fee will be levied to undertake compliance monitoring, via S106 Agreement, proportionate to the actual size of the provision. The fee levied will be subject to indexation calculated at 6 April each year. This fee will include site inspections, where relevant the Council's fees to facilitate the land transfer and has been calculated based on officer time for the minimum number of visits required both during construction and during the post completion defects period to ensure it is the appropriate standard for transfer.

Recreational Mitigation projects provided off-site

- 6.9 To ensure it is responsive to changing circumstances and opportunities, the programme of projects will be published separately.

- 6.10 Through an annual review of projects and implementation priorities a programme of mitigation projects will be agreed. Ensuring the delivery of mitigation projects is sufficient to meet the additional visits identified in Tables 5, 6 and 7 and remains in line with the implementation of new residential development will be a high priority in the overall programme for infrastructure delivery.
- 6.11 An initial tranche of projects for implementation in 2020 – 2025 will be programmed to ensure it has the potential to contribute to the mitigation aims of the Strategy and these will be implemented as funding becomes available. This includes analysis of the projects coverage versus the location development is expected to come forward in a given settlement.
- 6.12 The remaining projects for 2026-2036 will be assessed on their capacity to bring about mitigation and alleviate pressure on sensitive parts of the European sites. Assessment factors also include their deliverability, effectiveness monitoring and cost. At this assessment stage the project scope may be amended accordingly.
- 6.13 The projects will be prioritised based on their ability to be delivered, the likely level of visits mitigated against and the location in relation to residential development that has come forward. The estimated visits mitigated per project will be dependent on the population within 400m of each project and the scope of each project. Visitor counting devices will be used both prior and post implementation in order to determine the actual amount of visits mitigated.
- 6.14 The initial 5-year programme, including design and future maintenance, will have a collective budget of £420,000 per year

for all the projects identified. For the remainder of the plan period it is assumed that a similar budget will be required per annum to implement these projects.

- 6.15 Developments of under 50 dwellings where recreation mitigation is not provided on-site are required to make a contribution to identified offsite recreational mitigation projects identified. The level of financial contribution will be based on the following table.

Tenure	Assumed Occupancy	Contribution per dwelling Full mitigation off-site
1 bedroom	1.4	£2,630
2 bedroom	2.1	£3,472
3 bedroom	3	£5,115
4+ bedrooms	3.75	£5,786

Table 9 Contribution rate per dwelling by size of dwelling

- 6.16 These figures are subject to indexation and will be revised on the 6 April each year in line with the Retail Price Index (RPI).
- 6.17 In most cases the Community Infrastructure Levy (CIL) contribution paid as part of the development will exceed the figures above and the Council are committed to using the CIL paid towards recreational mitigation and therefore in most cases no separate contributions will be required¹⁹. Should a development be granted CIL relief (e.g. self-build of affordable housing) then the figures in the table will become payable. The contribution figures have been arrived at by distributing the total cost of the required off-site mitigation measures between the residential development sites that will not be directly providing ANRG on-site over the Plan period.

¹⁹ <https://democracy.newforest.gov.uk/Data/Cabinet/20141001/Agenda/CDR09267.pdf>

Mitigation project design and implementation

- 6.18 The costs of the recreation mitigation projects include the design, implementation and future maintenance in the estimated budget figure. The detailed design work will be undertaken in partnership / consultation with stakeholders.

Access Management Costs

- 6.19 All residential developments are required to make a contribution towards access management for the New Forest European sites. This enables the provision of the New Forest People and Wildlife Ranger service. As access management and monitoring are not infrastructure items they cannot be funded from CIL. They will be secured using alternative methods, such as a legal agreement.
- 6.20 The following table provide the total cost of access management.

Bedrooms	People and Wildlife Ranger Cost ²⁰
1 bed	£320
2 bed	£480
3 bed	£686
4+ beds	£857

Table 10 Contribution rate per dwelling for access management

- 6.21 These figures are subject to indexation and will be revised on the 6 April each year in line with the Retail Price Index (RPI).

²⁰ This has been calculated on an average cost of £586 per home split pro-rata across dwelling sizes and based on an average population of those bedrooms. This cost also includes funding towards resourced such as materials/leaflets that may be required.

Monitoring

- 6.22 The cost of the monitoring proposals as set out in Appendix 2 totals £460,000 over the full Local Plan period. Each new dwelling will be required to contribute to the monitoring cost. A contribution of £63 per dwelling will be charged (subject to indexation calculated at 6 April each year).

Affordable Housing & CIL reliefs

- 6.23 Affordable housing and residential development that does not have a CIL liability is not exempt from the requirement under the Conservation of Habitats and Species Regulations 2017 to mitigate its impact on protected European sites. Appropriate mitigation as set out in this strategy will be required and secured through S106 agreements.
- 6.24 If the total amount of Community Infrastructure Levy paid, having regard to any CIL relief or exemptions, falls below the sum indicated in Table 9 then any the shortfall (i.e. the difference between how much you pay in CIL and the total figure based on the total number of new dwellings provided/new bedrooms) will need to be made up with an additional payment secured by an appropriate method.

Summary of contributions

- 6.25 The following table shows the total financial contributions that are payable towards recreational impact mitigation on the New Forest to comply with the mitigation strategy. Figures are subject to

indexation and will be revised on the 6 April each year in line with the Retail Price Index (RPI).

Developments of less than 50 dwellings

Bedrooms	Offsite Recreational mitigation projects	Access Management	Monitoring	Total
1 bed	£2,630	£320	£63	£3,013
2 bed	£3,472	£480	£63	£4,015
3 bed	£5,155	£686	£63	£5,904
4 + beds	£5,786	£857	£63	£6,706

Table 11 Contribution rate for development less than 50

Developments of 50 or more dwellings

Bedrooms	Offsite Recreational mitigation projects	Access Management	Monitoring	Total
1 bed	Provided on-site	£320	£63	£383
2 bed	Provided on-site	£480	£63	£543
3 bed	Provided on-site	£686	£63	£749
4 + beds	Provided on-site	£857	£63	£920

Table 12 Contribution rate for development of 50 or more

Appendix 1 – Adopted Local Plan Policy

Saved Policy DM2: Nature conservation, biodiversity and geodiversity

Development proposals which would be likely to adversely affect the integrity of a designated or candidate Special Area of Conservation (SAC), classified or potential Special Protection Area (SPA), or listed Ramsar site will not be permitted unless there is no alternative solution and there are imperative reasons of overriding public interest which would justify the development.

Development proposals within or outside a Site of Special Scientific Interest (SSSI) which would be likely to adversely affect the site will not be permitted unless the benefits of the development outweigh both the adverse impacts on the site and any adverse impacts on the wider network of SSSIs.

Development which would result in damage to or loss of a site of biodiversity or geological value of regional or local importance (including Sites of Importance for Nature Conservation (SINC), Local Nature Reserves (LNR), Regionally Important Geological/Geomorphological Sites (RIGGS), and habitats of species of principal importance for biodiversity) will not be permitted unless the benefits of the development clearly outweigh the harm it would cause to the site, and the loss can be mitigated to achieve a net gain in biodiversity/geodiversity.

Development proposals will be expected to incorporate features to encourage biodiversity and retain and, where possible, enhance existing features of nature conservation value within the site. Existing ecological networks should be identified and maintained to avoid habitat fragmentation, and ecological corridors should form an essential component of green infrastructure provision in association with new development to ensure habitat connectivity.

Where development is permitted, the local planning authority will use conditions and/or planning obligations to minimise the damage, provide mitigation and site management measures and, where appropriate, compensatory and enhancement measures.

Development will not be permitted which would adversely affect species of fauna or flora that are protected under national or international law, or their habitats, unless their protection can be adequately secured through conditions and/or planning obligations.

Policy ENV1: Mitigating the impacts of development on International Nature Conservation sites

1. Except as provided for in the first paragraph of Saved Policy DM2: Nature Conservation, Biodiversity and Geodiversity, development will only be permitted where the Council is satisfied that any necessary mitigation, management or monitoring measures are secured in perpetuity as part

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of the proposal and will be implemented in a timely manner, such that, in combination with other plans and development proposals, there will not be adverse effects on the integrity of any of the following International Nature Conservation sites:

- The New Forest Special Area of Conservation (SAC), the New Forest Special Protection Area (SPA) and the New Forest Ramsar site;
- The Solent Maritime SAC, Solent and Isle of Wight Lagoons SAC, the Solent and Southampton Water SPA, and the Solent and Southampton Water Ramsar site;
- The River Avon SAC, Avon Valley SPA and Ramsar site; and
- The River Itchen SAC.

2. For residential development and the provision of overnight visitor accommodation adverse effects can be adequately mitigated by implementing approved measures relevant to the site location, including as set out in the Mitigation for Recreational Impacts SPD and in the Solent Recreation Mitigation Strategy, and in supplementary guidance on nutrient management.

3. For non-residential developments, the requirement for mitigation will be considered on case-by-case basis with regard to the nature, scale and location of the proposed use.

4. The approved mitigation measures for residential developments currently include:

i. For developments providing 49 or fewer net additional units of residential accommodation, financial contributions towards the provision of recreational mitigation measures as set out below and in the Mitigation for Recreational Impacts SPD:

- (a) Projects for the provision of alternative natural recreational green spaces and recreational routes: new or improved open space and recreational routes of a quality and type suitable to attract residents of new development within the Plan Area who might otherwise visit the International Nature Conservation sites for recreation; and
- (b) Access and Visitor Management: measures to manage the number of recreational visits to the New Forest and Solent Coast International Nature Conservation sites; and to modify visitor behaviour within those sites so as to reduce the potential for harmful recreational impacts; and
- (c) Monitoring of the impacts of new development on the International Nature Conservation sites and establishing a better evidence base: to reduce uncertainty and inform future refinement of mitigation measures.

ii. For developments of 50 or more net additional residential dwellings:

- (a) Direct provision by the developer of at least eight hectares of natural recreational greenspace per 1,000 population located on the development site or directly adjoining and well connected to it; and
- (b) A financial contribution towards Access and Visitor Management and Monitoring as set out above at i(b) and i(c).

- iii. Additionally for all residential developments within 5.6km of the Solent and Southampton Water SPA, as shown on Figure 5.1, a financial contribution is required towards a Solent-wide programme of visitor management, monitoring and development mitigation projects.
- iv. Additionally for residential developments and the provision of overnight visitor accommodation draining or discharging wastewater to the River Avon in relation to phosphate neutrality or to the Solent and Southampton Water in relation to nitrogen neutrality, a financial contribution or other appropriate mechanisms to achieve nutrient-neutral development.
- v. Additionally for all residential developments, a financial contribution towards monitoring and, if necessary (based on future monitoring outcomes) managing or mitigating air quality effects within the New Forest SPA, SAC and Ramsar site.

Appendix 2 - Monitoring Requirements

1 Monitoring the implementation of proposals - Annual monitoring of dwellings given planning permission and dwellings completions by location. Monitoring of implementation of alternative natural recreational greenspaces and other recreational mitigation projects Cost £40,000							
	Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency
1.1	Monitor Planning Permissions granted for new housing	Information on: <ul style="list-style-type: none"> • Planning permissions for residential development granted. • New dwellings permitted through 'prior notification' procedures • Dwelling completions By geographic location	Planning permissions granted (these should be mapped)	Existing processes, GIS plotting Annual Monitoring Report	NFDC	To ensure that the mitigation projects are being implemented in line with housing delivery.	NFDC
1.2	Monitor new housing completions by location	Information on dwelling completions, by geographic location	Mapping of housing completions by location	Existing processes, GIS plotting Annual Monitoring Report	NFDC	To ensure that the mitigation projects are being implemented in line with housing delivery.	NFDC
1.3	Monitor implementation of mitigation projects		<ul style="list-style-type: none"> • Implementation progress of mitigation projects. • Identification of strategic/local priority projects to progress. 	Implementation will be monitored through the Council's annual reporting process and S106/CIL allocation meetings.	NFDC	To ensure that the mitigation projects are being implemented as intended and in line with housing delivery. The projects do not have to be delivered directly to where development takes place as long as the strategy can be seen to be working.	NFDC

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2	Monitoring of costs of mitigation measures - Appraisal of actual implementation costs of mitigation projects against assumptions in this strategy. Cost: £40,000						
Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency	
2.1	Monitor costs of implementation of mitigation projects		Actual implementation costs compared to estimated project costs	Cost estimates to be reviewed and the location of projects/suitability in accordance with development. Review costs against new alternative projects. Implementation will be monitored through annual report process and S106/CIL allocation meetings.	NFDC	To ensure that sufficient money is collected by S106 contribution or allocated through CIL to the projects.	NFDC
2.2	Monitor costs of implementing ranger services		Actual implementation costs.	Cost estimates to be reviewed against actual implementation costs per annum. Clear specification for reporting to be included within tender.	NFDC	To ensure that sufficient money is collected by S106 contribution or allocated through CIL to the projects.	NFDC

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70	3 Monitoring the use of alternative natural recreational greenspaces and open space/ recreational walking route improvements. - Monitoring the use (number of visits) of alternative natural recreational greenspaces and improved footpath/ rights of way network. Establishing baseline information for existing rights of way use. Cost: £100,000							
	Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency	
	3.1	Establish baseline information about existing use and condition of land proposed to be subject to mitigation project	-	Establish baseline data on existing use and condition of recreational walking routes and areas proposed as alternative natural recreational greenspaces (to be agreed with the steering group).	Installation of monitoring counters along selected walk in collaboration with HCC Countryside department. On-site condition surveys	Hampshire County Council/ NFDC	To obtain base level information on usage on which the success of the mitigation strategy can be measured.	Hampshire County Council/ NFDC
	3.2	Carry out surveys on improved footpaths/rights of way.	-	Condition surveys of recreational walking routes.	Installation of monitoring counters along selected walks in collaboration with HCC Countryside department.	Hampshire County Council	To monitor the use of the routes usage using the results of the monitoring counters.	Hampshire County Council
3.3	Carry out survey of use of improved public open spaces/ANRGs.	-	Visitor numbers to sites.	Carry out a number of selected visits during the course of the year. Dates to be agreed between partners.	NFDC	To monitor the success of the improvements.	NFDC	

4	Monitoring the condition of designated sites and of changes which impact on their health - Establishing baseline information. Surveys of key indicator species. Cost: £100,000						
Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency	
4.1	Information from surveys of key species such as: <ul style="list-style-type: none"> Nightjar; Woodlark; and Dartford Warbler in NPA SPA. 	Nightjar survey of whole open forest carried out in 2013. Survey on whole open forest of Dartford Warbler and Woodlark to be carried out in 2014. National Studies (SCARRABS) of key species carried out in 2004 (Nightjar) and 2006 (Woodlark/Dartford Warbler).	National Studies due to be carried out in 2016 (Nightjar) and 2018 (Woodlark/Dartford Warbler).	Report and analysis of data/information when available from Natural England, Forestry Commission, and the National Park Authority, and others.	Natural England.	Information would be used to inform reviews of housing delivery and mitigation measures. Information can help determine what further surveys will be required.	Natural England/ National Park Authority
4.2	Monitor research on visitor capacities of habitats within the SPA	-	Information on the development of recreational management approaches with the New Forest National Park.	Studies by National Park Authority	National Park Authority	Information can help determine how successful mitigation measures are.	National Park Authority
4.3	Identify other indicators influencing the health and integrity of the SPAs	-	To be identified and agreed by Steering Group.	At annual Steering Group Meeting where implications of all information obtained will be discussed.	Steering Group	Impact will be monitored in accordance with the agreed measures	Natural England

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72	5	Research and monitoring of visitor patterns and numbers to European designations (New Forest and coastal SPA/SAC) - Contribute to research of visitor patterns to identify areas where people may be impacting on bird populations and other features of designated sites. This can inform access management strategies within the National Park, introducing measures which encourage people to avoid the use of sensitive areas. Further research should examine the extent of use and understanding of impacts arising from visitors accessing designated European sites and monitor Information Cost: £140,000						
	Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency	
	5.1	Sample study of selected new developments within the plan area to understand attitudes and behaviour with respect to recreational pressure on protected species and their habitats	New Forest Visitor Survey report produced in 2005.	Information on recreational attitudes and habits/behaviours. Information on dog ownership.	Householder surveys in new developments.	NFDC	Information would provide an input to help assess the effectiveness of the mitigation strategy and consider the need for review.	NFDC
	5.2	Collection and analysis from rangering activities	-	Information on activities/results from rangering activities.	Annual Report on rangering activities.	Body appointed to host Ranger	Information would provide an input to help assess the effectiveness of the mitigation strategy and consider the need for review.	NFDC
5.3	Carry out survey of visitor numbers and distributions of visitors within the SPAs.	New Forest Visitor Survey. Footprint Ecology (2020)	On-site surveys.	Carry out a number of selected visits during the course of the year. Dates to be agreed between partners.	National Park/ Forestry Commission	To understand the type and nature of visits within the European sites.	National Park Authority/ Natural England	

6 Review overall effectiveness of mitigation strategy (every 5 years) Cost:£10,000							
	Monitoring requirements	Existing Information/Data	Further information/Data required	How to be collected and reported	By Whom	Purpose	Lead Agency
6.1	Review overall effectiveness of mitigation strategy	-	All the various monitoring activities listed above.	Annual meeting of steering group	NFDC/ National Park/ Natural England/ RSPB/ HCC/ Hampshire and Isle of Wight Wildlife Trust	To appraise the overall effectiveness of the different components of the mitigation strategy.	NFDC/ Natural England

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Appendix 3: Design considerations for recreation walking route enhancements

6.26 When drawing up detailed proposals for recreation walking routes, there are a number of factors to be considered in the design. Further details and guidance is set out below.

Improve surface and route condition

Footpaths

6.27 Footpaths should be surfaced with a suitable material enabling their use throughout the year, in all weather conditions. They should be even and free from standing water. The provision of boardwalks may be necessary over particularly wet/muddy areas.



Clear overgrown and over-hanging vegetation

6.28 Paths should be clear from overhanging vegetation and be designed to be safe for the user, with good natural surveillance.



Improve signage

Provide clear route signage

6.29 The recreational walking routes should be clearly signposted from the road network and along their route. Information on destination and distances should be provided at key points along the routes, including at route intersections.



Improve accessibility

Replace stiles with gates

6.31 Stiles along footpath routes can be difficult to negotiate. The use of stiles should be avoided, and existing ones replaced with a kissing gate, gate or gap. This will improve accessibility, particularly for dog walkers, wheelchairs users, and people with pushchairs.



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Provide information/interpretation boards

6.30 Information/interpretation boards will be provided at key locations giving an overview of the local recreational walking route network and information about local features of interest.



Bridge watercourses

6.32 Some routes will cross a watercourse. In these cases it will be important that an appropriate safe crossing is installed.



Provide additional amenities

Provide waste bins

- 6.33 Waste bins (suitable for dog waste and litter) should be installed at entrance/exit points of recreational walking routes, and other key locations, to ensure that the areas are kept clean of waste.



Provide seating at viewpoints

- 6.34 Seating should be provided at appropriate locations along the route, for example where there is a view point or point of local interest.



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Appendix 4 - Design guidance for the provision of integrated greenspace on large scale sites, including Alternative Natural Recreational Greenspace (ANRG)

Strategic landscape requirements to accompany planning applications for residential developments over 50 dwellings

Introduction

This document is aimed at ensuring that space for recreational mitigation is embraced alongside other landscape and green space requirements as a fundamental cornerstone of green infrastructure. A core principle of 'Alternative Natural Recreational Greenspace' ANRG mitigation land is that it should be embraced as part of the green infrastructure of development sites, and provide accessible natural greenspaces on peoples' doorsteps, reducing the desire to use more environmentally sensitive areas in the New Forest.

The scope of this document is limited to how proposals for mitigation provision can be accommodated within housing developments. The recommended combined approach to providing the landscape design means that there will be cross referencing to related documents, including guidance on:

- Open spaces infrastructure components performance specification and standard details
- Design of play areas;
- Land management and maintenance standards.

The design of landscape should always address the three requirements of Policy ENV3 ensuring that it is functional (for people and wildlife); appropriate (to the landscape and townscape character); and attractive to users.

The purpose of the following guidance is to offer a 'ready-made template' for providing the alternative natural green space (ANRG) element of recreational mitigation.

This guidance is set out in four sections explaining:

1. ANRG as part of a combined approach to green infrastructure
2. Location for ANRG
3. Dimensional criteria for ANRG
4. Quality criteria for ANRG

This approach has been developed in liaison with Natural England to provide appropriate mitigation to meet the requirement of the Habitat Regulations

All residential developments on large scale sites should deliver ANRG in accordance with guidance set out in this document and show this at planning application stage within a clear rationale for green infrastructure as part of comprehensive layout designs, unless a strong case is made to show that this is not possible.

In such cases, delivery of an alternative offer of ANRG, that best fits this guidance in all other ways should be proposed. The Council reserves the right to negotiate and agree such alternatives in special cases in order to bring residential development forward.

Where developers propose an alternative approach to mitigation measures this will need to be subject to a full Appropriate Assessment, and the competent authority (the Council) will need to be satisfied that alternative approaches are at least equally effective in deflecting recreational visits away from the New Forest's protected sites.

The approach to mitigation in the New Forest District (outside of the National Park) involves, amongst other measures, the provision of a

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network of natural greenspaces located close to people's doorsteps, which will form a desirable alternative to visiting the New Forest for recreational purposes, including dog walking. This has the benefit of also providing attractive and healthy places to live.

To successfully perform as recreational mitigation land, it is important that all the spaces provide a natural green space that is inviting and comfortable for people to visit and use. These spaces should be suitable for well-behaved dogs to be walked, with places where dogs can be safely let off the lead.

In master planning terms, mitigation land should be considered and laid out as an integral part of the fabric of new development. It will form a major part of a network of green space and the green setting for new residential development. Site capacities and landscape sensitivities of the strategic housing allocation sites have been assessed and land allocated on the basis that recreational mitigation will be provided within the defined allocation sites.

It may be possible in some circumstances to extend the offer of ANRG beyond the development site boundary, provided that: the land in question can provide effective recreational mitigation; the land is within the control of the site promoter; and that its inclusion would support the principles of an integrated green infrastructure approach (being directly adjoining and well connected to the site). However, it will not normally be acceptable to offer an area of land nearby as ANRG, simply in order to expand the proportions of built land within the allocation area to an unreasonable degree or to the detriment of landscape character.

Each of the strategic housing allocations will be treated on its own merits and it is expected that the proposed recreational mitigation strategy for a site should be illustrated at planning application stage by a **Landscape Framework**. The best outcomes will be achieved by joint working between all parties involved in bringing a strategic site forward. Piecemeal approaches are unlikely to deliver the most effective and satisfactory forms of development.

1. A combined approach

A *Design and Access Statement* (D&AS) should be prepared as part of the submitted planning application. It should include annotated layouts, sketches, elevations and illustrations.

The D&AS should include a **landscape framework**, demonstrating how recreational mitigation in the form of ANRG would be achieved in accordance with policy.

The **landscape framework** will be a high level landscape strategy that combines the proposals for green spaces; footpath routes; habitat and biodiversity improvements integrally with existing features, landscape settings and the development layout so that the complementary advantages of each would optimise the recreational uses which would otherwise impact upon the New Forest.

The **landscape framework** should describe how sustainable drainage, public open space, green infrastructure, play and visual amenity will be addressed.

The **landscape framework** should indicate landscape and amenity benefits (some of which may not yet be quantifiable). It should address key matters, and explain how they will be addressed in a co-ordinated and effective way. The landscape framework should include a 1:500 plan clarifying the extent of land intended to be public and the extent of publicly accessible land which is to be calculated as qualifying ANRG. It should be annotated to cover the following issues:

- The existing landform and landscape features of the site – these will influence the design.
- The location and dimensions of proposed green spaces.
- The broad concept for drainage for the major green areas (and any provision for taking surface water from within the development areas).

- The broad treatment types applicable to each area of land and thus the management aspirations for each (for example: woodland; meadow; amenity grass; natural play etc.)
- The network of links and connections (including to the surrounding area) and circular walks and their hierarchy.

Each of the following matters should be dealt with (details of which may come forward at detailed application stage):

- Good pedestrian connections with existing residential areas.
- Linkages with other existing open spaces, streets, walking routes (and how these will be achieved).
- Provision of attractive walking routes with appropriately surfaced paths.
- Access for dog walking with off-lead areas and facilities to attract dog walkers.
- Boundaries to be secure or defined where needed.
- Optimising opportunities for biodiversity
- Ongoing land management.

The approximate locations for the following should also be illustrated on the proposed landscape framework in a way that facilitates a legible and attractive landscape.

- Play areas and any formal open spaces, such as playing pitches;
- Qualifying ANRG land
- A three-tiered strategy for planting trees (Forest scale species, medium or small/light canopied garden trees),
- SUDS elements (providing an understanding of scale, based on calculation of appropriate volumes and levels);
- Furniture and features - Seating, litter and dog waste bins.
- Signage and interpretation.
- Any underground encumbrance.

The landscape framework should demonstrate how the proposed development has reached its full potential in achieving an appropriate character of place and therefore quality of life through good design.

2. Location of ANRG

The suitability of land for functioning ANRG needs to be considered as part of a strategic landscape framework. Three main criteria should be used to determine the best location for ANRG on a site.

- ANRG will be most effective where the spaces provided are easily accessible to both new and existing populations. Maximising the number of recreational visits will be the main criterion for decisions regarding location of ANRG.
- Location of ANRG can also help the layout There will often be a need to create soft and green edges to development to successfully integrate it within a rural landscape. Locating recreational mitigation land to assist in the buffering of a rural edge may therefore be considered appropriate.
- Areas where natural habitats can best be retained, perpetuated or enhanced will be part of the location consideration, bearing in mind that ecologically sensitive sites are not usually considered appropriate places for increased human activity.

Each site will be considered on its individual merits but **designated nature conservation sites**, including Sites of Importance for Nature Conservation (SINCs) sites, **are unlikely to be improved by allowing increased human activity through them and will not normally be considered as suitable for ANRG recreational mitigation land.**

Ecological assets should be retained, protected and enhanced as part of any development proposal in accordance with the Council's policy STR1 and the requirement to achieve 10% biodiversity net gain as part of a planning permission. Examples of ecological assets include ancient woodland, any local nature conservation designations, such as SINC or LNR and any identified (through a Phase 1 Ecological survey) areas, habitats, nesting grounds or locations of rare species which are of particular sensitivity and which would be at risk through allowing dog walking and additional human presence in the area.

Opportunities to enhance existing habitats as part of a network of greenspace should be embraced through design and sympathetic management.

3. Dimensional criteria for ANRG

To ensure that recreational mitigation land provides a proper attraction to meet the policy requirements, the following criteria apply:

The design of the **landscape framework** is expected to deliver qualities that combine all the required amenities for a residential development, with the combination of areas of public open space (required under Policy CS7)and recreational mitigation land (ANRG) attracting visits and use of the greenspaces within the development.

All recreational mitigation land (ANRG) should exhibit a quality of attractiveness (usually naturalness) for informal recreation, usually walking, with or without a dog. It is expected that the majority of recreational mitigation land spaces should be available for well-behaved dogs to be exercised off-lead and that some areas should be provided specifically for the off-lead training of dogs. The following criteria are parameters for measuring what areas can qualify as meeting the purposes of the recreational mitigation in combination with public open space and other landscape provision.

The network of spaces must have at least one main space with further secondary spaces, if needed, connected to the main space by generous green corridors. Spaces and corridors that do not meet these criteria are nevertheless valuable but will count as POS and not ANRG provision.

The following criteria are illustrated in Figures 1-3:

- **Main space.** For an area to be considered as spacious enough to offer a sense of being in the countryside, at least part of the provision should consist of a space (or extend an existing qualifying green space) of at least 120m across in all directions

i.e. a 60m radius can be drawn on it without undue interference from other uses or development.

Where non-strategic residential development sites of over 50 (but under 100) dwellings cannot reasonably accommodate an uninterrupted radius of 60m but requires on-site mitigation, the council will accept alternative dimensions for this main space, if it offers a space of equivalent area (i.e. at least 1.14ha) and maximises the breadth of the space where possible.

- **Secondary spaces** – The main space(es) should be supplemented by further linked spaces. To be considered appropriate mitigation space, such spaces need to be a minimum of 60m across in all directions i.e. a 30m radius can be drawn without undue interference from other uses or development.

A series of such spaces will be considered as having recreational mitigation land dimensions, provided that they are properly linked to the main space within 60m, and within 500m where the link consists of other such spaces as part of a connected series.

- **Links** – links that allow such spaces to work cumulatively must be spacious in themselves. They should be an average of 20m wide (minimum 15m at any given point).

If links are provided, they may be considered to meet the purposes of recreational mitigation land where they are within 30m of a main or secondary space (so a maximum of 60m to create a link between two spaces).

- **Severance** – Secondary spaces cannot be disconnected from the main space. Where a road would cross a link or space, this will be considered to have severed the connection to the larger space unless it can be demonstrated that the road's design allows very easy crossing for people and animals. This can be

through a combination of design devices including: 10mph speed restriction; easy access under or over; edge and surface characteristics that allow easy crossing; serving only small numbers of dwellings; designed to minimise visual severance by allowing a green interface/connection to dominate

- **Combined open space use** - Provided that ANRG spaces meet the dimensional criteria above, additional public open space uses, such as natural play or informal playing fields should be integrated within the design of natural greenspaces on the development.

4. Quality criteria for ANRG

Once it is established that the land is expansive enough to provide ANRG, the landscape design qualities that make the spaces functional, appropriate and attractive to users, all need to be set out. The following criteria also apply:

Routes

A hierarchy of routes and connections should be illustrated on the **Landscape Framework**, demonstrating:

- Strategic routes leading to key destinations and residential neighbourhoods (also, where appropriate, to the wider network of PROW).
- Minor leisure routes needed to create a circuit or to connect with other minor spaces or paths:
- Additional circuits and recreation routes that stay within the proposed green spaces.

Planting

The landscape **framework** should show soft landscape types including for instance, but not limited to:

- Spring wildflower meadow
- Summer wildflower meadow
- Amenity grass
- Wetland or boggy ground herbs and bulbs

- Native shrub/woodland edge
- Hedgerows
- Woodland
- Trees and tree groups
- Where existing features are to be retained, some indication of how this is to be accomplished will be needed. For example a label explaining: *“Hedgerow cleaned out, laid and gapped up with native species whips”* or *“Woodland group cleared of deadwood, understorey brought into management and additional trees planted as whips and feathered groups”*.

Plant species should generally be native to Britain, in order to optimise biodiversity. However ornamental species of trees, for example, may be required to underpin landscape character and sense of place, offering occasional landmarks or visual connections and legibility. In some instances, use of more robust species as part of meadow planting areas (e.g. bulbs) can offer amenity without detracting from the value of the habitat and can help local communities appreciate the value of such areas.

Furniture and facilities

The landscape framework should show approximate locations for these. Whilst details may be left until later in the design process, a minimum expectation for these is outlined below as guidance.

All furniture and facilities should be appropriate to context, drawing from the local vernacular, and would usually be timber from certified sustainable sources to provide for a lifespan of at least 20 years:

- Combined dog waste and litter bins to be provided at each main entrance to spaces or at road access points from paths. The Council has a preferred supplier of such bins.
- Seats, provided at an average of one, two-person seat for every 50 new resident, placed at reasonable intervals along routes to allow less mobile people to rest.
- Recreational mitigation land should be designed to embrace the opportunities for children to play in an interesting natural environment. The principles for play design including natural play

are explained in more detail in the council's 'Design Guidance for Children's Play' document.

Interpretation and Signage

Each area will require adequate signage to define its purpose and help direct people and manage behaviour. Through good design we nonetheless expect the areas created to be legible, with the use of planting and materials aiding navigation and encouraging the appropriate use of areas and spaces.

All of the projects will need to be branded by the Green Way logo and tag, displayed on all signage and interpretation.



For ANRG spaces and routes, there will need to be a range of way-markers and interpretation for a number of purposes. Provision will be needed for:

- An interpretation board for each space or at the entrances to a combined network of spaces. These will show connected routes as well as explain the purpose of the recreational mitigation land, any expectations regarding behaviour, and indicating any dog management requirements, such as dog off lead areas.
- Gateway markers will be required at main entrances to green spaces and routes.
- Simple way-marker posts along routes that connect up both ANRG spaces and the network of routes so that users can navigate and identify the areas as places to walk their dogs.

Public Open Space expectations

For the allocated strategic housing sites, the Council has prepared **Site Concept Masterplans** to accompany the site specific policies. These

are illustrative but indicate the expected distribution of all open space. Those areas of land which the Council views as needing to remain free from development are marked. Notwithstanding other factors (such as flooding and ecology) that are subject to further survey and assessment, the space is defined as either those spaces which are large enough to qualify as ANRG or other areas where public open space may be of advantage but where dimensions prohibit the space being considered as ANRG.

Informal public open spaces will be needed to ensure that the character and quality of streets and neighbourhoods is both pleasant and contextually appropriate. They will be needed: to provide enough space to enable large species trees to be planted; to bring play provision close to home; to soften streets and squares with greenery; to provide space for retention of trees; hedges and other habitats or to link recreational mitigation land and formal open spaces.

There is no separate distinction between the design submissions for ANRG and Public Open Space. They both contribute to the **Landscape Framework**. Designs should be contiguous and appropriate to the recreational needs most appropriate to their location on the site. There is no assumption that ANRG is wild, equally there is no assumption that POS is heavily formalised. Where land that counts as ANRG is close to property, it may need to be more manicured in appearance. Conversely where ANRG can be appropriately managed, it should embrace an enhancement of biodiversity through habitat creation and retention.

Ultimately it is expected that all of the open space and recreational mitigation land will help create pleasant places to live and enjoy, respect the landscape character of the area; and provide amenity and enhanced local biodiversity being key aspirations on all such spaces, whatever their primary purpose.

Integrating Sustainable Urban Drainage features (SuDS)

Recreational mitigation land offers an opportunity integral drainage design that fulfils the policy requirements for managing surface water from new residential developments. This may be in the form of above

ground features such as ditches, swales, water storage areas and ponds.

Above ground SuDS features should be included in the layout and landscape framework and may be included in public open space provided that they enhance the landscape character, its biodiversity, and thus offer amenity.

Where SuDS features are proposed, careful attention to detail is required to ensure that they can be adopted and managed without undue negative impacts on the landscape quality. Even when SUDS are to be adopted by other agencies, such features must be designed for enhanced visual amenity and biodiversity.

Underground water storage features within public open space and recreational mitigation Land are **not** normally acceptable.

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ANRG Diagram 1: a comprehensive green infrastructure

which takes mitigation compliant spaces as its foundation:
connecting neighbourhoods, enhancing habitats and providing amenity

Severance

This road severs the linked network at this point. Spaces beyond this point cannot be considered as ANRG compliant unless the road is designed to allow extremely easy crossing of people and animals (e.g. narrowed section of shared surface, traffic calming table with road serving a small number of dwellings)

Secondary Spaces

A space that is at least 60m in any direction (30m radius) if designed to embrace the principle elements for mitigation may be counted as contributing to ANRG.

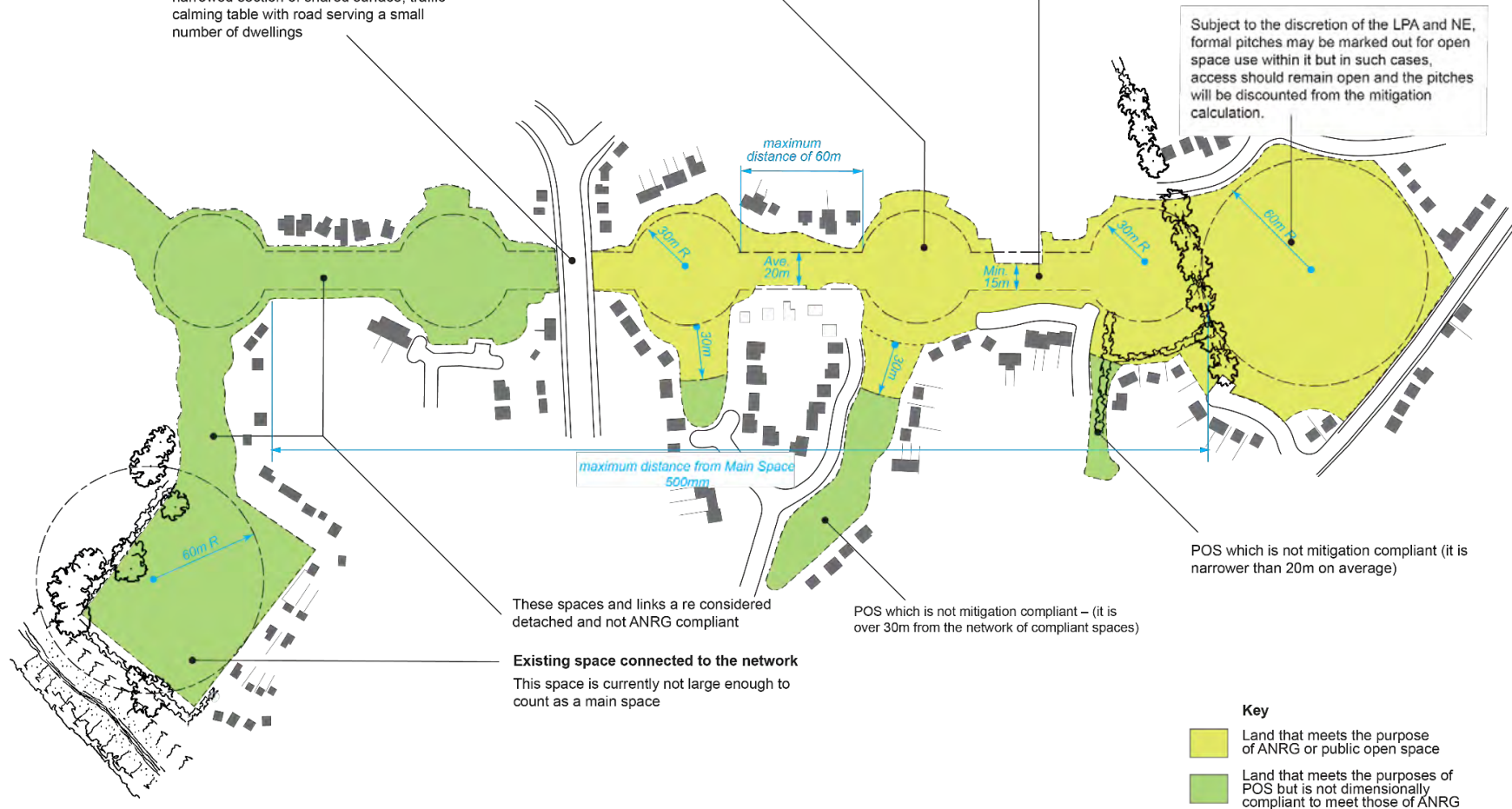
Links

Corridors between or linking to spaces may be counted as ANRG if they are 20m wide on average (min 15m at any point) and extend no more than 30m from edge of the space

Main Spaces

Provided that a space at least 120m in any direction (60m radius) is designed to embrace the principle elements for mitigation, it may be counted as contributing to ANRG.

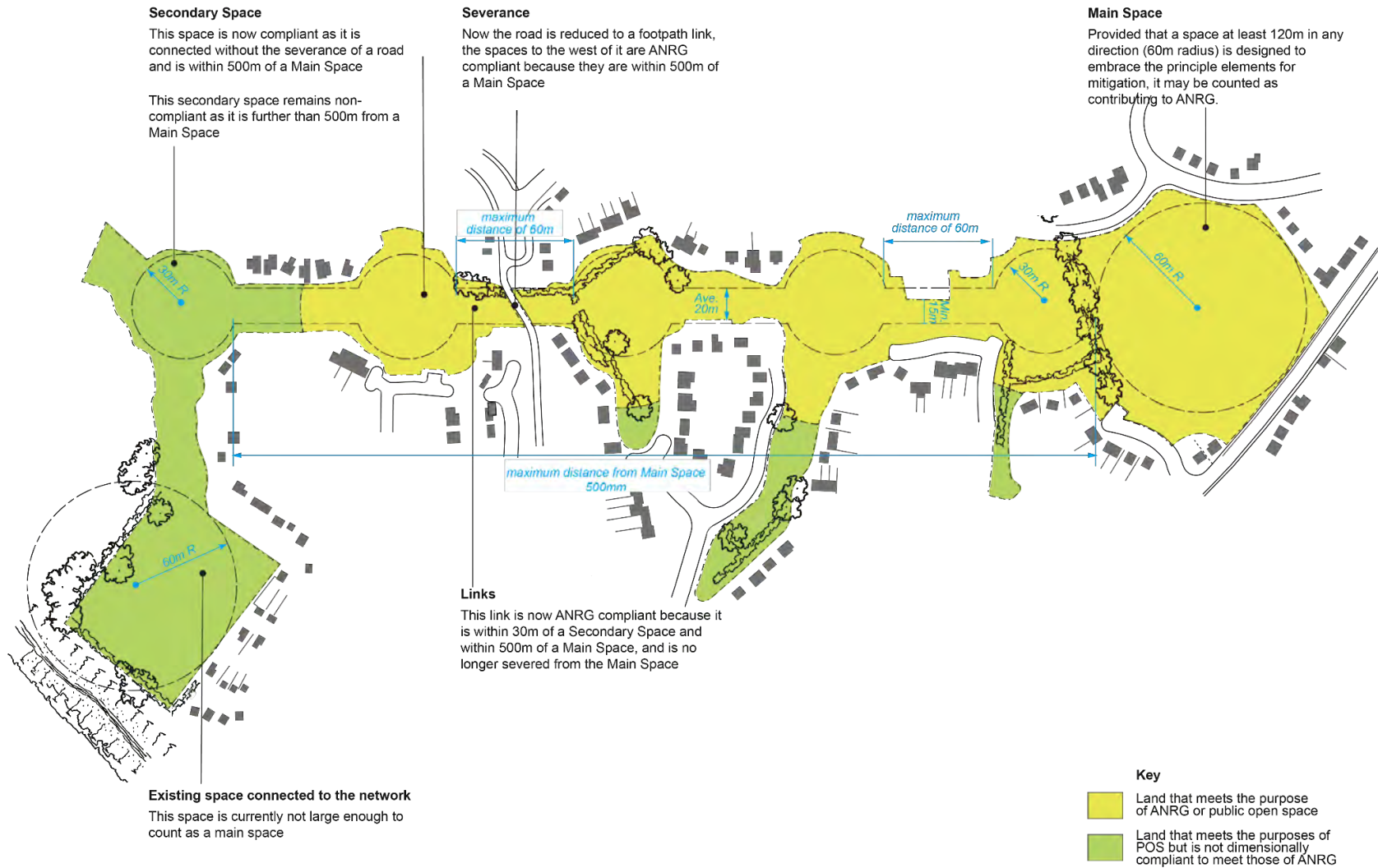
Subject to the discretion of the LPA and NE, formal pitches may be marked out for open space use within it but in such cases, access should remain open and the pitches will be discounted from the mitigation calculation.



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ANRG Diagram 2: Relieving the severance of a road to enable the network of spaces to become ANRG compliant

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ANRG Diagram 3: Extending the network

Some double counting issues explained

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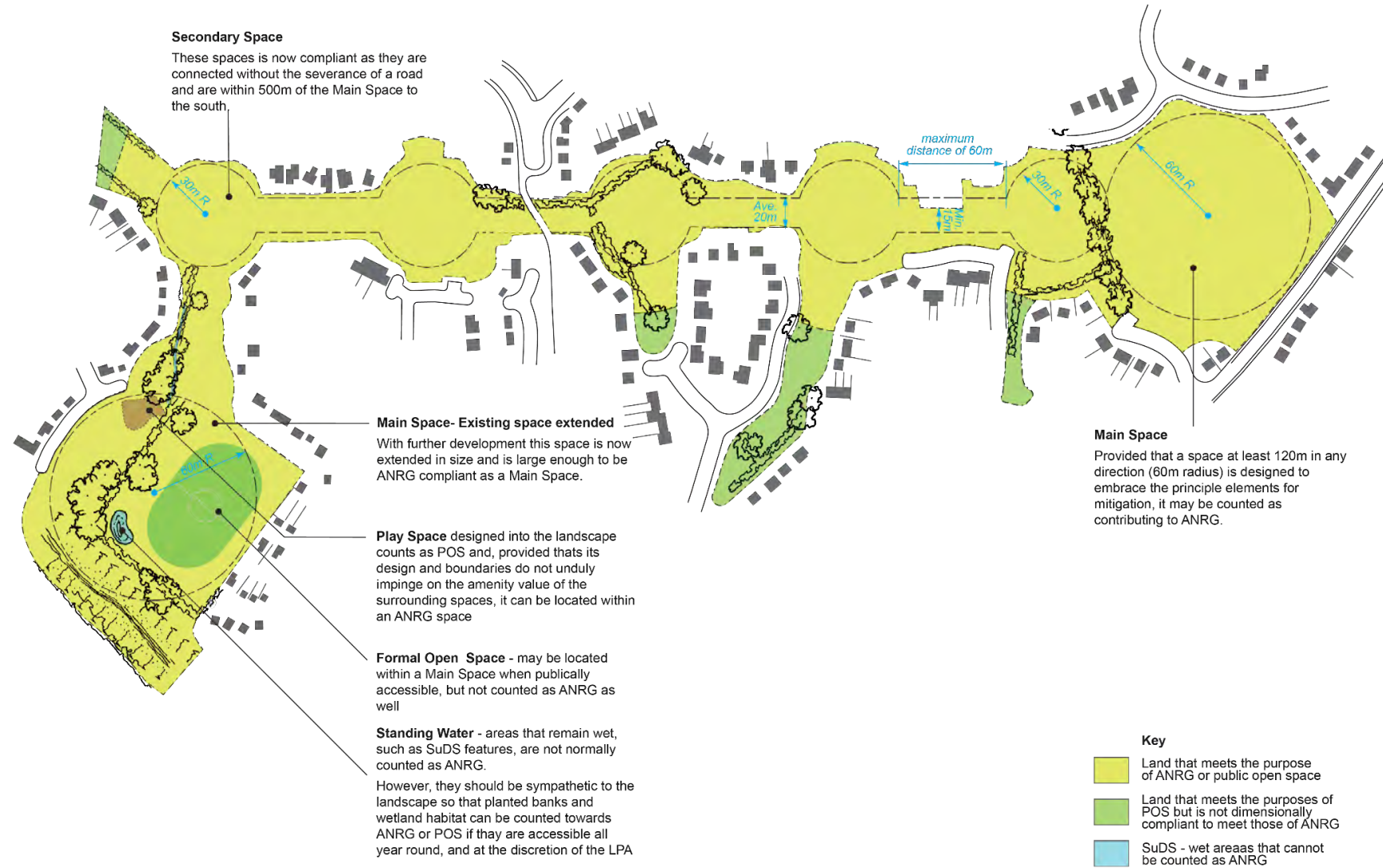


Fig 4: Landscape Framework

This Illustrative framework offers an early stage, high level landscape strategy for a hypothetical site. It covers the issues very simply and would act as the forerunner of a landscape layout. More detail, description and images should be illustrated within the D&AS pages.

Drawings should list:

- X hectares of land available for new ANRG and POS use
- Y hectares of Land available for POS use only
- Z hectares of existing land improved and redesigned to contribute to overall ANRG contribution.
- 1 No. Play area of 0.A Ha area

- 2 No. Doorstep Playable Spaces totalling 0.B hectares

The Landscape Framework should cover:

- The existing landform and landscape features of the site
- The location and dimensions of proposed major green areas.

- The broad concept for drainage
- The broad treatment types applicable to each area of land and thus the management aspirations for each (for example: woodland; meadow; amenity grass; natural play etc.)
- A simple network of connections - a hierarchy of routes.

The framework should be supported by the D&AS to show how each of the following matters will be dealt with:

- Good pedestrian connections with existing residential areas.
- Linkages with other existing open spaces, streets, walking routes (and how these will be achieved).
- Provision of attractive walking routes with appropriately surfaced paths.
- Access for dog walking with off-lead areas and facilities to attract dog walkers.
- Boundaries to be secure or defined where needed.
- Optimising opportunities for biodiversity
- Ongoing land management.

The approximate locations for the following:

- Play,
- A three-tiered strategy for planting trees
- SUDS elements
- Furniture and features
- Signage and interpretation.
- Any underground encumbrance.



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Informative Note: Figure to be finalised for final draft for consultation

Detailed design considerations for Recreational Mitigation Land: Spaces and Routes

There are a number of key features that are required as a minimum in the design of recreational mitigation spaces and routes, so that they perform well for their intended purpose and the designed features have adequate longevity. The Council has a set of standard details that are acceptable in planning terms. For the purposes of this document, the broad qualities of these key features are described below:

A hierarchy of new and existing footpath routes

It is helpful to set out paths as a three-tier hierarchy according to likely use and importance:

- Strategic routes leading through to other major draws should be of sufficient width and durable surface to cater for the level of use.
- Minor leisure routes will be needed to create a circuit or to connect with other minor spaces or paths.
- Additional circuits and leisure routes that stay within green spaces and take negligible footfall from off site

These will pick up on likely desire routes and be aligned to create interest and enjoyment through their variety of experience

Footpaths should be surfaced with a suitable material enabling their use throughout the year, in all weather conditions. They should be even and free from standing water, and be suitably edged to retain the integrity of the construction

Paths need to be marked on plan accurately enough to ensure delivery. Whilst it is accepted that some disturbance within root protection zones may be inevitable, this should be minimised. The exact line of paths which run within woodlands or through tree groups may therefore require agreement on site.



Examples of typical paths: widths, surfacing and edging

Paths over culverted watercourses should not have exposed head walls unless they are designed as features which are sympathetic to the landscape ethos of the open space. It is preferable to bridge watercourses with an appropriate safe crossing.

Paths which run over wetland should be designed as raised causeways wherever possible (and EA flood capacity requirements allow). If a boardwalk is required either as special feature or for practical purposes, it is expected to have a lifespan of 15 years, including those parts in standing water.

For reasons of comfort (and for social distancing) Paths should be wide enough or have enough clearance to either side so that people with dogs may pass comfortably or where paths are narrow, frequent passing places. They should be clear from encroaching vegetation and be designed to be safe for the user, with good natural surveillance.



Examples of typical watercourse and floodplain crossings

Information/interpretation boards provided at key locations should give an overview of the local recreational walking route network and information about local features of interest

All signage and interpretation will carry the Green Way logo and tag to help users identify the 'Green Way Spaces' and 'Green Way Routes' as being accessible and dog friendly places

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Provide clear route signage and interpretation

Waymarking: The new recreational walking routes and enhancement of the existing PROW routes should be clearly signposted at access points and along their route. Information on destination and distances should be provided at key points along the routes.

Ensure accessibility

Where barriers are required along a route, kissing gates or self-closing pedestrian gates are most appropriate.



Examples of typical accessible barriers

Provide additional amenities

- Combined waste bins (dog waste and litter) should be installed at entrance and exit points of recreational walking routes, and in locations on Recreational mitigation spaces that are convenient to use and for operatives to empty.
- Seating should be sited at appropriate locations to provide opportunities for rest at convenient intervals as well as opportunities for conversation and to appreciate the natural qualities of place and special views.

Provide dog activity areas or trails

A main aim of the ANRG provision is to encourage residents to use local walking routes and spaces for walking and dog exercise. Therefore, the recreational mitigation land must provide opportunities for people to experience and enjoy responsibly, the healthy exercise and interaction with their dogs, by provided by dog specific exercise features and worthwhile challenges for dogs of different sizes and abilities.

Dog activity areas or trails should be designed to give dog owners a sense of being welcome visitors and minimise conflicts through good design that steers and directs activities to appropriate places

Each area or trail needs:

- plenty of space around each activity
- fencing to prevent dogs running out into danger,
- shady places to rest, with seats for owners
- water for cooling down
- dog waste bins.

Further information can be found at Appendix 6: Managing dogs on Recreational Sites

The Council has guidance on Performance Specifications and Standard Details for open spaces infrastructure elements.



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Appendix 5 – Managing dogs on recreational sites

Research was undertaken into the demands of dog walkers by joint working of the Natural England, the Kennel Club, and Hampshire County Council. The 2007 project identified a number of key desires from those walking their dogs and are still relevant to the projects this mitigation strategy will deliver. As further monitoring emerges through both the mitigation projects delivered and ranger service provided by this strategy, this will further refine and influence the design of future projects. Recent changes in dog ownership and any subsequent research undertaken in this may also influence future approaches to management and provision of measures.

When choosing a site, the top three requirements for sites were the following:

1. Allowing dogs off lead
2. Away from traffic
3. Close to home

The research concludes that this pattern of demand is well established, and that the basic requirements for sites are not liable to change. The majority of owners want responsible behaviour and are therefore open to modifying their behaviour if the approach is right – a planned strategic approach will manage the needs on their terms.

Taking a prohibitive “don’t” approach has been proved to be ineffective. It is also not necessary to explain in detail why management is needed. The outcomes are far better if the measures are geared around what walkers want for their dogs – “making it easy to do the right thing”.

Key messages relevant to projects in this mitigation strategy include:

1. Provide good signage
2. Be clear about when and where physical restrictions start and finish
3. Deliver key messages at the right time

Initiatives have been tested in a number of locations, and the practical measures which work best are:

- Guides/leaflets (small and neat). Forestry England have examples. A more up to date approach is to replace these with web-based QRC codes linking to further information
- Signage (colour coded and located at the right places)
- Dedicated off-lead areas (in sensitive sites/areas this would be in a designated area)
- Flat and open walking areas work well; however, woodland can also be popular with dog walkers (and can feel less busy through less inter-visibility)
- Time sensitive measures crucial: implementing measures at right time of year e.g. Feb – Aug, and in right zones (changing extent and type of measures throughout year) – this point is more relevant to visitor management on protected European sites rather than the mitigation projects in this strategy.
- Dog and human trail/dedicated dog gym (FE/Kennel Club design guidance)
- Dog washes – desirable, but may not always be practical to provide
- Dedicated parking for cars with dogs.
- Rangering is crucial for managing and monitoring
- Gates rather than stiles on walking routes
- Placement of waste bins where practicable they are most easily used (rather for where they are most easily collected)

Further information and best practice:

National dog walking code - <http://www.dogwalkingcode.org.uk/>

Hampshire County Council –

<https://www.hants.gov.uk/thingstodo/countryside/dogwalking>

Dorset County – www.dorsetdogs.org.uk

Hampshire/loW Wildlife Trust – <https://www.hiwwt.org.uk/dog-walking-our-nature-reserves>

Solent Disturbance and Mitigation Project -

https://solent.birdaware.org/media/27454/Mitigation-options-for-encouraging-responsible-dog-walking/pdf/Mitigation_options_for_influencing_the_behaviour_of_walkers_with_dogs.pdf

Appendix 6 - Key Council Contacts and Useful Links

Planning Contacts

For general enquiries about this SPD or other planning issues relating to the Local Plan please contact:

Planning Policy Team
Appletree Court
Beaulieu Road
Lyndhurst
SO43 7PA
Tel: 023 8028 5345
Email: policyandplans@nfdc.gov.uk

For general enquiries relating to the development of a specific site/pre-application enquiries please contact:

Development Management Team
Appletree Court
Beaulieu Road
Lyndhurst
SO43 7PA
Tel: 023 8028 5345
Email: Planning@nfdc.gov.uk

Useful Links

Other information relating to the Council's Local Development Framework can be found on the Council's website – www.newforest.gov.uk

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Appendix 7 - Glossary

AMR
Annual Monitoring Report

ANRG
Alternative Natural Recreational Greenspace

Appropriate Assessment
Carried out under Article 6(3) of the Habitats Directive to ensure activities have no adverse impact on the Natura 2000 sites

CIL
Community Infrastructure Levy

Competent Authority
as defined by the Conservation of Habitats and Species Regulations 2010

Conservation of Habitats and Species Regulations 2010
The European Habitats Directive transposed into UK law

European Site
Designated as a SPA.SAC or SSSI

European nature conservation site
Designated as a SPA.SAC or SSSI

Habitats Directive (92/43/EEC)
European Directive on the conservation of natural habitats and of wild fauna and flora

HRA
Habitats Regulations Assessment

IDP

Infrastructure Development Plan

IFS
Infrastructure Funding Statement

In perpetuity
In a planning context 80 years is considered to be 'in perpetuity'

LNR
Local nature reserve

LPA
Local Planning Authority

Natura 2000
SPA's and SAC's together

New Forest European Sites
Refers to The New Forest SAC; New Forest SPA; **and includes** The New Forest Ramsar site

NFNPA
New Forest National Park Authority

PROW
Public right of way, including Footpaths, Bridleways, Restricted Byways and Byways Open to All Traffic

Ramsar
Wetland site of International importance designated under the Ramsar Convention.

SSSI
Site of Special Scientific Interest- a British conservation designation for either biological or geological interests

SINC

Site of Interest for Nature Conservation – a local designation relating to habitats and species

SAC

Special Area of Conservation, relating to the conservation of habitats

SPA

Special Protection Area, relating to the conservation of wild birds

Southampton Water and Solent Coast European Sites

refers to the Solent Maritime SAC; Solent and Southampton Water SPA; the Southampton and Isle of Wight Lagoons SAC; **and includes** the Solent and Southampton Water Ramsar site

S106 Agreement

Multilateral Legal Agreements used in combination with Planning Permission to secure particular aspects of development, such as financial contributions and transfer of land into public ownership

Planning Obligation

A planning obligation is a legal document made under S106 of the Town and Country Planning Act 1990 by which a person agrees to provide a planning authority with a sum of money for a planning purpose, or agrees to restrict the use of land in a specified way, or to carry out specific operations or activities.

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ICT STRATEGY & BUDGET UPDATE

1. RECOMMENDATIONS

- 1.1 That the ICT Strategy and Budget Update detailed in this report, including an overall reduction in forecast expenditure to £2.174m, (Table 2 at 9.3) be supported; and
- 1.2 That the rephasing of the budget as demonstrated in Table 2 at 9.3, be reflected in Council's Medium Term Financial Plan.

2. PURPOSE

- 2.1 The purpose of this report is to detail progress since February 2020 against the ICT Strategy for 2018 to 2022, and to provide an update on the budget.

3. BACKGROUND

- 3.1 In 2017, Council agreed an ICT Strategy for 2018-2022, including protect and maintain, plus a future investment approach, and the budget to deliver all elements.
- 3.2 Cabinet also agreed an additional series of ICT projects as part of the Smarter Working programme.
- 3.3 The ICT Strategy 2018-2022 was structured into four distinct themes and this report will discuss progress on each of these themes in turn. It will look at what has been delivered so far and what is still to be delivered. The four themes are:
 - Resilience & Security
 - Digital services for residents and businesses
 - Simple and standard applications
 - Smarter working
- 3.4 The budgeted position for 2020/21 and 2021/22 as included in the February 2020 MTFP and 2020/21 Budget Setting Report are shown in Table 1 of section 9 (including the sums set-aside for ICT expenditure within the 'Smarter Working' programme).

4. RESILIENCE AND SECURITY

4.1 Background

The ICT Strategy aimed to replace the aged and 'out of support' ICT infrastructure at NFDC, and ensure the council remains secure against cyber-attacks and other failures. This covered circa 650 individual items including servers, storage, networks, remote working software, security management software, virtualisation software, and all necessary licensing. It also covered the set-up of a new data centre for NFDC in a 'private cloud' and preparations for the use of 'public cloud' solutions.

4.2 **Delivered and Complete**

All major elements have been successfully delivered. This has made NFDC's ICT Infrastructure significantly more stable and secure from failure and has reduced the risk of a major systems outage and the consequent disruption and reputational damage this could have caused. The success of this work can be measured by the way NFDC staff were able to connect and work from home with relatively little problem since the outbreak of the Covid19 pandemic.

4.3 **To Be Delivered**

We have to complete the remaining configuration of our failover solution between our primary and secondary data centres (Gosport and ATC respectively). This has been delayed due to new and delayed work resulting from pandemic restrictions, and the pressure to implement our new Voice solution on time over the summer. This work will be completed by the end of this financial year.

Future work to keep NFDC's ICT software and hardware current and effective will be handled as 'Business as Usual' from the annual Resilience and Security budget to ensure that NFDC systems remain stable, up to date, and secure from cyber-attacks.

5. **DIGITAL SERVICES FOR RESIDENTS AND BUSINESSES**

5.1 **Background**

We have seen many changes in how customers want to interact with the Council, and the increased use of online tools, whether that is using a website, app or webchat. There will be opportunities for internal efficiency gains, cost savings, and income generation opportunities if we create the right digital platform. We needed to update our website (Content Management System) and then create the right customer management solution (Customer Relationship Management system) to be able to offer as many of our services as possible via online channels. We will continue to offer a face to face service to those residents unable to avail themselves of digital services to avoid exclusion of any groups or individuals.

5.2 **Delivered and Complete**

The Finance and HR/Payroll replacement projects have been completed successfully this year. These were funded from the previous ICT strategy. Within the current strategy, a new Automated Payment system (ATP) has been implemented, and work has commenced on the new Regulatory Services system (Planning & Environmental Health) which will continue into the next financial year.

5.3 **To Be Delivered**

The selection of a vendor and creation of a new Customer Relationship Management system to create a better end to end experience for residents and businesses who use NFDC online services has started and will be completed in 2021/22.

6. SIMPLE AND STANDARD APPLICATIONS

6.1 Background

'Application' is the term for software that performs a specific function or set of functions. Applications are accessed via a device (e.g. laptop or smartphone) and they are the means by which council staff are able to store data and perform their business processes. Simplifying and standardising applications is critical to ensuring the council has 'best of breed' applications for each of our business processes. We aim to buy 'vanilla' versions of software that have been proven in other local authorities. We have a range of old and complex applications at present and the aim of the ICT Strategy is, over time, to replace these with simpler, standardised solutions.

6.2 Delivered and Complete

The 'out of support' Agresso HR/Payroll Application has been replaced with an up to date and industry standard 'Itrent' HRHub Application.

The 'out of support' Agresso Finance Application has been replaced with an up to date and industry standard Business World Application 'BW7'.

6.3 To Be Delivered

Replacement of the Acolaid application for Planning and Environmental Health has been started and progressed as far as possible during this year, including the start of the procurement process, and will be delivered in 2021/22. This Acolaid application is at 'end of life' and needs to be replaced; continuation is not an option. This project has been named Project RS (Regulatory Services) for easy identification.

Review and potential replacement of the Orchard Application for Housing will be started and progressed as far as possible during this year and will be completed in 2021/22.

7. SMARTER WORKING

7.1 Background

In 2017, it was agreed that moving all staff to mobile devices, able to connect to NFDC from anywhere, would offer the council the most flexibility for the future. As a result, the migration of all staff from desktop equipment to hybrids (light-weight laptops with touch screens) was accelerated and aligned with the rollout of Smarter Working. This was then combined with Office 365 rollout, the replacement of the Avaya telephone system with Skype, and the replacement of the Meridio document management system with SharePoint. This approach has proved vital in enabling the council to continue working since the outbreak of the Covid19 pandemic.

7.2 Delivered and Complete

Hybrid devices and smart phones were issued to all appropriate NFDC staff and they were all migrated to Office 365. The Avaya telephone system has been replaced with Skype. The Netcall contact centre system (managing call queuing and customer services for all services) has been replaced with Enghouse. The replacement of the Meridio document management system with SharePoint has commenced and is being piloted for HR and Legal. Finally, it was decided by Cabinet that, given ongoing remote working caused by the pandemic, members would be offered standard NFDC devices.

These were rolled out during August and September to 24 members and 5 more devices are due to be issued, bringing it to almost 50% of members now using the full functionality identical to officers.

7.3 To Be Delivered

EMT have asked for Microsoft Teams to be added to the scope of this project. The migration from Skype/SharePoint to Teams will be completed from now until the end of 2021/22.

8. CRIME AND DISORDER, EQUALITY & DIVERSITY AND ENVIRONMENTAL IMPLICATIONS

- 8.1 None directly, although Smart Working has the potential to reduce the carbon footprint for staff travelling less miles by car.

9. FINANCIAL IMPLICATIONS

- 9.1 The headline is that our projects have delivered, or are forecast to deliver, on or very close to budget. There have been some delays this year in the Digital and Applications projects, with more time required to specify and procure the systems this year, meaning they will be delivered now in 2021/22. This has resulted in rephasing of some budget into later years, but no extra external costs.

- 9.2 The addition of Microsoft Teams to the scope of Smarter Working has increased the Smarter Working budget by £100,000. By contrast, £147,000 of the Applications budget will be unspent at the end of this ICT Strategy. Other than these changes, the transformation of ICT has met its financial targets.

- 9.3 The financial summary is as follows:

TABLE 1

Last Reported Position - Feb 20 and Actuals 2019/20	Actuals to 31/03/2020	Unspent in 19/20	Budget 2020/21	Budget 2021/22	Total Original Budget	
	£000	£000	£000	£000	£000	£000
Resilience & Security	145		88	88	321	300 note 1
Digital services for residents and businesses	20	25	240	115	400	400
Simple and standard applications	33	67	400	250	750	750
	198	92	728	453	1471	1450
Smarter Working	346	104	300		750	750
	544	196	1028	453	2221	2200

Notes

1. There is an additional spend of £21k on Resilience and Security as against the original budget due to additional equipment and service costs.

TABLE 2

Updated Position - Nov 2020 and Actuals 2019/20	Actuals to 31/03/2020	Budget 2020/21	Budget 2021/22	Budget 2022/23	Total	Original Budget	
	£000	£000	£000	£000	£000	£000	
Resilience & Security	145	88	88		321	300	note 1
Digital services for residents and businesses	20	60	200	120	400	400	
Simple and standard applications	33	50	270	250	603	750	note 2
	198	198	558	370	1324	1450	
Smarter Working	346	280	170	54	850	750	note 3
	544	478	728	424	2174	2200	note 4

Notes

1. The required budget for Resilience & Security in 2022/23 will be estimated as part of the next ICT Strategy (2023-26).
2. There is estimated to be £147k less spent than previously forecast against the original strategy.
3. The Smarter Working budget last November did not include Phase 3 of that project. This has now been estimated and included. In addition, extra funding is required to implement Microsoft Teams, which was originally not planned until 2023 but has been accelerated due to the need for better external conferencing and remote collaboration than Skype (our current technology) can offer.
4. Less than expected is estimated now to be spent in 2020/21 (£478k compared to £1028k). This is due to more time required on specifying and procuring the Applications and Digital projects in 2020/21, moving delivery and funding requirements to 2021/22.

10. CONCLUSION

- 10.1 This year's pandemic, and the resulting changes to working arrangements, has tested and fully justified NFDC's investment in ICT transformation. The NFDC ICT environment continues to improve and has now caught up with, or has sometimes overtaken, the technologies in place at other local authorities.
- 10.2 This is in no small part due to the dedication and skills of the in-house ICT team which was also transformed as part of the ICT Strategy. The majority of current team has joined in the last 4 years, complementing the officers who have longer service, to create a very strong delivery capability for both 'business as usual' and projects. The calibre of the ICT team, and their commitment day after day, has been a huge contributor to the success of our ICT services in the last 12 months.
- 10.3 There is much work still to do to bring our application portfolio up to date and to remain current with our communications, infrastructure and security solutions. The overall ICT success can be measured by the general stability of our ICT systems, the delivery of projects to plan, and by the fact that the council was able to continue doing business through the difficulties of Covid19.
- 10.4 Future investment in ICT will be essential to the Council. A new ICT strategy for 2023-26 will be developed during 2021, in liaison with all council service areas, to ensure we stay up to date and are able to deliver all council services using the most useful and most cost-effective technologies.

11. CORPORATE OVERVIEW AND SCRUTINY PANEL COMMENTS

- 11.1 The Panel, at its meeting of 19 November 2020, was supportive of the recommendations.

12. PORTFOLIO HOLDER COMMENTS

- 12.1 Our drive towards modernising our ICT has been fully justified during the pandemic enabling the Council to work, deliver its services and to hold meetings online. The report before you shows this to be a dynamic and ongoing process and details the upcoming projects along with the associated budgets.
- 12.2 We live in an era when technology is constantly evolving and changing and we, as an organisation, must be prepared to invest in those changes if we are to avoid falling behind.

For further information contact:

Rob Beere
Service Manager – ICT
Email: Rob.beere@nfdc.gov.uk

Manjit Sandhu
Executive Head of Resources
Email: Manjit.sandhu@nfdc.gov.uk

Background Papers:

ICT Strategy 2018-2022

CABINET – 2 DECEMBER 2020

PORTFOLIO: FINANCE, INVESTMENT &
CORPORATE SERVICES / ALL

FINANCIAL MONITORING REPORT (based on Performance April to October 2020 inclusive)

1. RECOMMENDATIONS

1.1 It is recommended that Cabinet;

1.1.1 notes the latest budget forecasts of the General Fund (section 4), Capital (section 5) and HRA (section 6); and

1.1.2 supports the distribution of £107,308 to the Town and Parish Council's on the basis of £1.50 per band D property (2021/22 tax base) in support of the financial pressures faced by each Council as a result of the Coronavirus

2. INTRODUCTION

2.1 Following the adoption of the Emergency Budget 2020/21 in September 2020, this report provides an update on the General Fund, Capital and Housing Revenue Account budgets, adjusting for any budget changes now required.

3. BACKGROUND

3.1 The Council's 2020/21 budget has been significantly impacted by COVID-19. An Emergency budget for 2020/21 was approved by the Council in September. The Emergency Budget included adjustments to take account of new expenditure pressures, income losses, funding support and mitigating adjustments. At that time, certain assumptions were made on the recovery period, and didn't include, for example, provision within services for a second 'lockdown'. The Emergency Budget did however retain a 2020/21 contribution to the budget equalisation reserve of £1.062m and preserved the Councils £3m General Reserve, both of which are therefore available to assist in further budget pressures, above and beyond the expectations within the Emergency Budget.

3.2 Financial Monitoring is an important feature in the management of the Council's finances as it gives an opportunity to reflect on variations as against the latest set budget and reflect on the impact that these variations may have over the period covered by the Councils Medium Term Financial Plan.

4. GENERAL FUND REVISED PROJECTION

4.1 A General Fund budget of **£19.194m** for 2020/21 was agreed by Council in February 2020.

4.2 The new expenditure pressures assumed within the Emergency budget totalled £1.305m, and income losses after the application of specific grant and funding schemes was £2.041m. The Emergency Budget adopted in September, which also

took into account mitigations put in place by the Council, increased the General Fund Budget to **£20.117m**.

- 4.3 The latest forecast confirms an improved budget position with adverse net expenditure variations totalling £23k and favourable net income adjustments totalling £136k. The income adjustments include additional forecast loses within services totalling £433k and improved/additional income collection in other services and specific service grants of £569k. The potential government support through the Sales, Fees and Charges compensation scheme for the additional losses is worth a reimbursement of £259k, but as no income has been received yet from this scheme, the support funding has not been assumed within this monitoring report.
- 4.4 Rephasing of £442k (with a General Fund impact of £354k) has occurred within the ICT strategy (covered by a separate report on this cabinet agenda). The replacement of the Synthetic Turf Pitch at Lymington Health & Leisure centre (£172k) will now take place during the Easter '21 school holidays, and the planned maintenance of the Stillwater Park site will be deferred until 2021/22 resulting in rephasing of £67k. The resultant total rephasing of £593k will be released in future years in accordance with the revised delivery timescales.
- 4.5 The changes as above result in an updated General Fund Budget of **£20.004m**; a reduction of £113k from the September Emergency Budget.
- 4.6 In addition to the Portfolio variations reportable, additional support funding of £204,463 has been received to further assist with the financial pressures faced by the Council due to COVID-19.
- 4.7 The September Emergency Budget allowed for a reduction in interest earnings, to a level c50% of the returns generated in 2020/21. There has been a further shift in the instant access market, with some rates being set at negative, even though the Bank of England has not taken the Bank Rate negative. There are also limited options for the placement of medium-term cash at this time due to volatility that current exists in the pooled equity markets. Cash balances will continue to be managed in line with the adopted Treasury Management Strategy, ensuring security and liquidity are prioritised over yield. No further adjustment is made to the interest earning income budget within this monitoring report, but the situation will be kept under close review over the final part of the financial year.
- 4.7 Taking all variations as outlined above into account, the overall net adjustment of £317k can be credited to the budget equalisation reserve and can be called upon if further expenditure pressures or income losses accrue between now and the yearend.
- 4.8 The revised General Fund Budget 2020/21 can be seen at Appendix 1, with further details on the variations being reported included within Appendix 2.

5. CAPITAL EXPENDITURE (General Fund and Housing Revenue Account)

- 5.1 A Capital Programme budget of **£25.694m** for 2020/21 was agreed by Council in February 2020.
- 5.2 The programme was revised in line with the preparation of the Emergency Budget, with

non-essential schemes being removed, new requirements added and rephasing from the previous year reflected, where necessary. The Emergency Budget adopted in September increased the Capital Programme Budget to **£29.214m**.

- 5.3 The latest forecast confirms variations totalling -£455k and rephasing's of £2.649m as against this revised budgeted position. The variations are summarised below:

Variations

- Disabled Facilities Grants (£580k and £500k) – issues with access to properties and availability of contractors and materials during 2020 mean that the full private sector (Better Care Funded) and public sector (HRA funded) programmes will not be delivered in 2020/21
- Emergency Works Milford Sea Wall (£625k) – covered by a previous report to Full Council

Rephasings

- New Depot Site – the delivery timeframe now needs to be adjusted.
- Vehicles & Plant Replacement Programme – 4 vehicles will no longer be replaced in 2020/21, resulting in a rephasing of £649k.
- Smarter Working; Future Delivery – a budget was allowed for within the 2020/21 programme, but competing priorities in 2020/21 mean that only an element of the budget will be spent in the current financial year.

- 5.4 The changes as above result in an updated Capital Programme Budget of **£26.110m** (appendix 3).

6. HOUSING REVENUE ACCOUNT

- 6.1 A break-even HRA budget for 2020/21 was agreed in February 2020, with the Revenue Account surplus of £8.473m supporting the financing of the £15.8m HRA Capital Programme.
- 6.2 While there has been an increase in gross rent due from additional properties arising from the Acquisition and Development Strategy this has been offset by an increase in income lost from void (temporary vacant) dwellings and garages. No overall budget variation is currently forecast from the original £28.2m budget.
- 6.3 Despite the supply chain disruptions and other complications arising from COVID the revenue and capital repairs maintenance budgets of £10.493m are still on target to be spent. There are various movements within the £6.44m supervision and management budgets but no overall budget variation is currently forecast.
- 6.4 Expenditure of £75k has been incurred on enhancements to the computer software within rents and maintenance but this will be funded from the specific HRA ICT Reserve.

7. SUPPORT TO NEW FOREST TOWN AND PARISH COUNCILS

- 7.1 Within the District Councils' Emergency Budget 2020/21, £100,000 was set aside in the Leaders Portfolio to assist Town and Parish Councils with their financial pressures

as a result of the Coronavirus. Town and Parish Councils have not received support funding directly from central government, but rather the amounts released to District Councils were intended to also support lower tier councils 'in financial distress'.

- 7.2 The Tax Base calculation has been completed for 2021/22 (elsewhere on this Cabinet agenda) and confirms a Tax Base of 71,538.7, resulting in an overall year-on-year growth of 0.06%. This is lower than the typical average growth due to the impact of additional Council Tax Reduction Claimants and a lower forecast collection rate for 2021/22. This negligible level of growth in the Tax Base further supports the rationale for the District Council in sharing a proportion of the support funding we have received.
- 7.3 The latest grant distribution methodology being used by the government is to apply a fixed £ per head to individual authorities. Using the calculated 2021/22 Band D Tax Base as the 'per head' measure and a fixed £1.50 per dwelling is a transparent and clear methodology that can be shared with the Town and Parish Councils.
- 7.4 The resultant cost of £1.50 x 71,538.70 is an overall support payment by this Council to the Town and Parishes of £107,308, marginally exceeding the initial £100,000 budgeted.
- 7.5 The individual Council values are shown within Appendix 4.

8. CRIME AND DISORDER / EQUALITY AND DIVERSITY/ENVIRONMENTAL IMPLICATIONS

- 8.1 There are no Crime & Disorder, Equality & Diversity or Environmental implications arising directly from this report.

9. PORTFOLIO HOLDER COMMENTS

- 9.1 The report highlights, if it is necessary to do so, the ever-changing financial environment in which all organisations find themselves. The variations within this report do not have a material impact on the financial position of this Council and can be accommodated without any need to revise our overall strategy.
- 9.2 One other part of this report that is worthy of note is that earlier on in the outbreak of COVID-19 this Council made provision to support Town and Parish Councils. We are now detailing how that will be delivered through a one off payment tailored on the Council Tax Base to ensure that it provides support across the whole of the District, without adding to the administrative burden of those organisations.

For Further Information Please Contact:

Alan Bethune
Chief Finance Officer (S151 Officer)
Telephone: (023) 8028 5001
E-mail: alan.bethune@nfdc.gov.uk

FINANCIAL MONITORING 2020/21						
REVISED GENERAL FUND BUDGET 2020/21	Feb 20	Sept 20	December 20			
	2020/21 £'000's Original Budget	2020/21 £'000's Emergency Budget	2020/21 £'000's New Variations Expend.	2020/21 £'000's New Variations Income	2020/21 £'000's New Variations Rephasings	2020/21 £'000's Updated Budget
PORTFOLIO REQUIREMENTS						
Community Affairs	1,497	1,612	71	-71		1,612
Economic Development	-11	-85				-85
Environment and Regulatory Services	9,177	9,535	-30	28		9,533
Environment - Income Support Scheme		0				0
Finance, Corporate Services and Improvement	3,863	3,708	25		-354	3,379
Finance - New Burdens Funding		-170				-170
Finance - Emergency Assistance Grant		-134				-134
Housing Services	1,847	2,393	140	30	-67	2,496
Housing Services - Accomodation Support Funding		-100		-338		-438
Leader and Corporate Affairs	68	168	7			175
Leisure and Wellbeing	1,403	6,361	-200	250	-172	6,239
Leisure and Wellbeing - Income Support Scheme		-2,220				-2,220
Leisure and Wellbeing - Furlough		-1,100				-1,100
Planning and Infrastructure	1,361	2,316	10	-35		2,291
Planning and Infrastructure - Income Support Scheme		-620				-620
	19,205	21,664	23	-136	-593	20,958
Reversal of Depreciation	-1,545	-1,535				-1,535
Contribution to/(from) Earmarked Revenue Reserves	-256	-435			593	158
Contribution to Revenue Reserves	1,250	5				5
NET PORTFOLIO REQUIREMENTS	18,654	19,699	23	-136	0	19,586
Minimum Revenue Provision	1,181	1,204				1,204
RCCO	375	0				0
Interest Earnings (Net)	-730	-500				-500
New Homes Bonus	-286	-286				-286
GENERAL FUND NET BUDGET REQUIREMENTS	19,194	20,117	23	-136	0	20,004
COUNCIL TAX CALCULATION						
Budget Requirement	19,194	20,117	23	-136	0	20,004
Less:						0
Settlement Funding Assessment						0
Revenue Support Grant	0	0				0
Business Rates Funding Target	-3,997	-3,997				-3,997
	-3,997	-3,997	0	0	0	-3,997
Covid Support Funding						
Public Sector Funding Support - Tranche 2		-1,783				-1,783
Public Sector Funding Support - Tranche 3		-250				-250
Public Sector Funding Support - Tranche 4				-204		-204
	0	-2,033	0	-204	0	-2,237
Locally Retained Business Rates	-2,398	-2,398				-2,398
Budget Equalisation Reserve	1,062	1,062	317			1,379
Estimated Collection Fund (Surplus)/Deficit Business Rates	-892	0				0
Estimated Collection Fund (Surplus)/Deficit Council Tax	-218	0				0
Use of General Budget Reserve	0	0				0
COUNCIL TAX	12,751	12,751	340	-340	0	12,751
TAX BASE NUMBER OF PROPERTIES	71,492.90	71,492.90				71,492.90
COUNCIL TAX PER BAND D PROPERTY	178.36	178.36				178.36
GENERAL FUND BALANCE 31 MARCH	3,000	3,000				3,000

FINANCIAL MONITORING 2020/21
VARIATION ANALYSIS GENERAL FUND 2020/21

	December 20			
	2020/21 £'000's New Variations Expend.	2020/21 £'000's New Variations Income	2020/21 £'000's New Variations Rephasings	2020/21 £'000's Updated Budget
PORTFOLIO ADJUSTMENTS				
Community Affairs				
COVID Marshall Funding	71	-71		0
Economic Development				
No variations to report				
Environment and Regulatory Services				
Garden Waste income up		-50		
Recycling income - Glass Rec Credits up (£60k) and Proj Integra down (£30k)		-30		
Streetscene - vacant posts	-75			
Public Conveniences - £25k above the initial £100k adjustment likely (agency cleaners etc)	25			
Cemeteries shortfall in income		23		
Pest Control shortfall in income		50		
Income support Scheme		(poss -37)		
Engineering Works +1 Operative (See also P&I)	20			
Private Hire Operators shortfall in income		20		
Driver Training Shortfall in income		15		
	-30	28	0	-2
Finance, Investment and Corporate Services				
ICT Projects Rephasings (covered in detail in separate report)			-354	
Post Freeze adj re part streetscene	25			
	25	0	-354	-329
Housing Services				
Consultation on Stillwater Park maintenance scheme not possible, so rephase to 21/22			-67	
Homelessness additional expenditure pressures	140			
Homeless Support Grant Received to assist in additional expenditure pressures		-338		
Houses of Multiple Occupation shortfall in income		30		
	140	-308	-67	-235
Leader and Corporate Affairs				
Support Funding to Town and Parish Councils	7			7
Leisure and Wellbeing				
Additional 1 month HLC closure. Nov impact £220k, with £30k assumed for knock on Income Support Scheme		250 (poss -188)		
Lymington STP Replacement Project (will be April Easter Holiday)			-172	
Asset Maintenance Programme delivery delays	-200			
	-200	250	-172	-122
Planning and Infrastructure				
Town Centre Car Parks (assumed loss of 50% of Nov income)		45		
Income Support Scheme		(poss -34)		
Amenity Car Parks Additional Income July - October		-80		
Engineering Works +1 Operative (see also Env & Reg)	10			
	10	-35	0	-25
TOTAL PORTFOLIO ADJUSTMENTS	23	-136	-593	-706
NON-PORTFOLIO ADJUSTMENTS				
Cont to reserves re rephasing			593	
Govnt Support - Tranche 4		-204		
TOTAL NON-PORTFOLIO ADJUSTMENTS	0	-204	593	389
GRAND TOTAL ADJUSTMENTS (Credited to (-) / Debited from (+) Budget Reserves)	23	-340	0	-317

FINANCIAL MONITORING 2020/21

REVISED CAPITAL PROGRAMME 2020/21

		Feb 20 2020/21 £'000 Original Budget	Sept 20 2020/21 £'000's Emergency Budget	2020/21 £'000's New Variations Expend.	Dec 20 2020/21 £'000's New Variations Rephasing	2020/21 £'000 Updated Budget
Disabled Facilities Grants	HSG (GF)	1,200,000	1,200,000	-580,000		620,000
Strategic Regional Coastal Monitoring (15-21)	ENV	1,495,000	1,495,000			1,495,000
Hurst Spit	ENV					
Barton Drainage Test (19-21)	ENV	50,000	225,000			225,000
Public Convenience Modernisation Programme	ENV	300,000				
Public Convenience Additional Enhancements	ENV/LEADERS	75,000				
Lymington Sea Wall	ENV	400,000				
Emergency Works - Milford Sea Wall			1,500,000	325,000		1,825,000
Emergency Works - Milford Sea Wall S151 Contingency				300,000		300,000
New Depot Site	F,CS&I	3,000,000	2,000,000		-1,750,000	250,000
V&P; Replacement Programme	F,CS&I	1,682,000	1,490,000		-649,000	841,000
Smarter Working; Future Delivery	F,CS&I	500,000	500,000		-250,000	250,000
Commercial Property Acquisitions	F,CS&I		3,000,000			3,000,000
Residential Property Acquisitions	F,CS&I		1,500,000			1,500,000
Open Space Schemes	P&I	292,000	155,000			155,000
Transport Schemes	P&I	265,000	150,000			150,000
Mitigation Schemes	P&I	635,000	199,000			199,000
TOTAL GENERAL FUND CAPITAL PROGRAMME		9,894,000	13,414,000	45,000	-2,649,000	10,810,000
HRA - Major Repairs	HRA	5,600,000	5,600,000			5,600,000
Estate Improvements	HRA	200,000	200,000			200,000
Council Dwellings - Strategy Delivery	HRA	9,000,000	9,000,000			9,000,000
Disabled Facilities Grants	HRA	1,000,000	1,000,000	-500,000		500,000
TOTAL HRA CAPITAL PROGRAMME		15,800,000	15,800,000	-500,000		15,300,000
GRAND TOTAL CAPITAL PROGRAMME		25,694,000	29,214,000	-455,000	-2,649,000	26,110,000

FINANCIAL MONITORING 2020/21

SUPPORT PAYMENT TO TOWN & PARISH COUNCILS

	£1.50 per 2021/22 Band D
	£
ASHURST & COLBURY	1,389
BEAULIEU	770
BOLDRE	1,590
BRAMSHAW	511
BRANSGORE	2,738
BREAMORE	270
BROCKENHURST	2,844
BURLEY	1,189
COPYTHORNE	1,832
DAMERHAM	359
DENNY LODGE	247
EAST BOLDRE	575
ELLINGHAM HARBRIDGE & IBSLEY	930
EXBURY & LEPE	179
FAWLEY	6,905
FORDINGBRIDGE	3,530
GODSHILL	342
HALE	398
HORDLE	3,627
HYDE	769
HYPHE & DIBDEN	11,109
LYMINGTON & PENNINGTON	11,225
LYNDHURST	2,209
MARCHWOOD	3,087
MARTIN	296
MILFORD-ON-SEA	4,281
MINSTEAD	558
NETLEY MARSH	1,224
NEW MILTON	15,773
RINGWOOD	8,106
ROCKBOURNE	251
SANDLEHEATH	415
SOPLEY	587
SWAY	2,559
TOTTON & ELING	14,108
WHITSBURY	152
WOODGREEN	377
	107,308

COUNCIL TAX 2021/22 - SETTING THE TAX BASE

1. RECOMMENDED

1.1 That it be a recommendation to the Council that:

- a) The calculation of the Council's tax base for the year 2021/22 be approved.
- b) Pursuant to this report and in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by this Council as its council tax base for the year 2021/22 be as follows and as detailed in Appendix 3.

PARISH/TOWN	TAX BASE 21/22
Ashurst & Colbury	926.3
Beaulieu	513.1
Boldre	1,059.8
Bramshaw	340.4
Bransgore	1,825.0
Breamore	180.1
Brockenhurst	1,895.9
Burley	792.9
Copythorne	1,221.0
Damerham	239.5
Denny Lodge	164.8
East Boldre	383.2
Elingham, Harbridge & Ibsley	619.8
Exbury & Lepe	119.4
Fawley	4,603.5
Fordingbridge	2,353.2
Godshill	227.8
Hale	265.4
Hordle	2,417.8
Hyde	512.5
Hythe & Dibden	7,406.1
Lymington & Pennington	7,483.2
Lyndhurst	1,472.8
Marchwood	2,057.7
Martin	197.2
Milford on Sea	2,853.8
Minstead	372.3
Netley Marsh	816.1
New Milton	10,515.3
Ringwood	5,404.3
Rockbourne	167.3
Sandleheath	276.6
Sopley	391.1
Sway	1,706.1
Totton & Eling	9,405.1
Whitsbury	101.1
Woodgreen	251.2
Whole District	71,538.7

2. INTRODUCTION AND BACKGROUND

- 2.1 The purpose of this report is to enable Members to approve the tax base for 2021/22.
- 2.2 This tax base is an important step towards setting the basic amount of Council Tax. The other key steps are determining the surplus/deficit on the Collection Fund for the previous year and setting the actual budget requirements.
- 2.3 Members may recall that each dwelling falls into one of eight valuation bands (A to H) for council tax purposes. Different proportions of tax are payable by each band.
- 2.4 The tax base is the estimated number of dwellings in the District, modified to take account of the different proportions payable, discounts, exemptions and other reductions.
- 2.5 The calculation of the tax base for tax setting also includes an allowance for non-collection.
- 2.6 Separate tax bases have to be made for each Parish.
- 2.7 The tax base calculation has to be made between 1 December and 31 January. The approved tax base must be notified to the County Council by 31 January.

3. THE CALCULATION PROCESS

- 3.1 Detailed calculations are required to set the tax base for tax setting purposes.
- 3.2 Firstly, if appropriate, it is necessary to adjust the number of dwellings in each valuation band to allow for:
 - 3.2.1 The number of properties estimated as being exempt
 - 3.2.2 The number of demolished dwellings due to be removed
 - 3.2.3 The reduction and addition to the number of dwellings in the band due to disabled relief. Disabled relief to dwellings in Band A (shown as Disabled A) pay 5/9th of the Band D charge instead of 6/9th).
- 3.3 The above process produces the number of chargeable dwellings. Further adjustments then have to be made to allow for:
 - 3.3.1 The estimated number of dwellings where a 25% discount will apply (i.e. due to single person discount or a discount disregard).
 - 3.3.2 The estimated number of dwellings where a 50% discount will apply due to structural repairs work being undertaken for first 12 months, or two adults disregarded e.g. living away to receive or provide care etc.
 - 3.3.3 The estimated number of dwellings where a 100% discount will apply for one month only, due to being unoccupied and unfurnished ('void') dwellings.
 - 3.3.4 The estimated number of dwellings where an Empty Homes Premium will apply due to being empty and substantially unfurnished for more than two or five years.

- 3.4 The number of total discounts is multiplied by an appropriate percentage to arrive at the discount deduction. The resultant net number of dwellings is multiplied by the relevant proportions to band D. The relevant proportions are shown in Appendix 1. This process produces the number of band D equivalents.
- 3.5 The value of council tax reductions (CTR) awarded to pensioners and those of working age are aggregated to arrive at the total council tax reduction. These values are converted into the tax base and band D equivalents. The value of the reductions awarded takes account of the Council's localised Council Tax Reduction Scheme. There are no changes being made to the Local Scheme for 2021/22.
- 3.6 The next step of the calculation is to assess the likely collection rate and thereby make an appropriate allowance for non-collection. The 2020/21 Tax Base was set with an assumed collection rate of 98.5%. The collection rate for 2019/20 was 98.64%. The rate for 2021/22 is particularly difficult to assume in the current economic climate. A rate of 98.24% has been set to reflect the impact of COVID-19 after analysing trends and making assumptions on future collection rates. Contributions in lieu for Ministry of Defence dwellings are then added. The whole calculation process is shown in Appendix 2.
- 3.7 The figures used in the calculation process are based on latest actuals. Appendix 3 shows 2021/22 tax bases compared to 2020/21.
- 3.8 Although there may be some growth in the tax base in the forthcoming year, it is advisable to take a prudent approach. If dwellings are improved and/or extended, bandings only normally change after a subsequent sale or the granting of a lease of 7 years or more.

4. ENVIRONMENTAL AND CRIME AND DISORDER IMPLICATIONS

- 4.1 None arising directly from this report.

5. CONCLUSION

- 5.1 The Council should approve formally the tax base for tax setting purposes. The regulations require that the tax base be formally approved for each parish/town Council area, with the calculations being approved by Members.
- 5.2 A prudent approach has to be taken in forecasting the tax base. Clearly, there is an obligation to ensure that sufficient funds are realised to meet the Council's expenditure.
- 5.3 A realistic collection rate has to be determined. It is important that the tax base is not overstated, as any shortfall will result in interest costs falling on the Council's General Fund.
- 5.4 Any Council Tax surplus/deficit on the Collection Fund will be shared between the Principal Authorities, pro rata to the demand/precept on the fund for the year concerned.

6. PORTFOLIO HOLDER COMMENTS

- 6.1 As with my usual comments on this paper this is a technical report brought forward by officers on an annual basis and from which we calculate the precept. In every

other year that I have been in this role, I have been happy to leave my comments there, however this year has been far from normal and, despite the growing rate of construction within our District, the result of COVID-19 is that in a number of town and parishes across the New Forest have seen an almost negligible increase in their Council Tax Base and this will have a knock-on effect.

Further Information:

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Background papers:

The Local Authorities (Calculation of
Tax Base) (England) Regulations
2012

VALUATION BANDS

All dwellings have been valued by the Valuation Office Agency, based on property prices at April 1991. There are eight valuation bands and each dwelling has been placed into one of these bands according to its assessed value at that time. Band A is the lowest. The higher the band, the higher the council tax charge will be. See the table below:-

BAND	RANGE OF VALUES	PROPORTION
A	Up to £40,000	£1.00
B	Over £40,000 - £52,000	£1.17
C	Over £52,000 - £68,000	£1.33
D	Over £68,000 - £88,000	£1.50
E	Over £88,000 -£120,000	£1.83
F	Over £120,000 -£160,000	£2.17
G	Over £160,000 -£320,000	£2.50
H	Over £320,000	£3.00

For every £1.00 of Council Tax for a band 'A' property, a band 'B' property will be charged £1.17 - and so on. Any discounts and reductions would make the difference less than this.

	SUMMARY									
	DIS. A	BAND A	BAND B	BAND C	BAND D	BAND E	BAND F	BAND G	BAND H	TOTAL
TOTAL DWELLINGS ON THE VALUATION LIST	0	7131	12098	18082	19400	13522	7012	4559	607	82411
ACTIVE EXEMPTIONS	0	321	214	264	380	198	86	46	8	1517
DEMOLISHED DWELLINGS BAND TO BE REMOVED	0	5	2	5	6	2	1	2	0	23
CHARGEABLE DWELLINGS	0	6805	11882	17813	19014	13322	6925	4511	599	80871
NUMBER OF CHARGEABLE DWELLINGS SUBJECT TO DISABLED REDUCTION	0	31	68	140	181	151	67	61	23	722
NUMBER OF DWELLINGS EFFECTIVELY SUBJECT TO CTAX FOR THIS BAND BY VIRTUE OF DISABLED BAND	31	68	140	181	151	67	61	23	0	722
NUMBER OF CHARGEABLE DWELLINGS ADJUSTED FOR DISABLED RELIEF	31	6842	11954	17854	18984	13238	6919	4473	576	80871
NUMBER OF DWELLINGS ENTITLED TO 25% DISCOUNT	11	3893	5211	5706	5519	2973	1319	717	61	25410
NUMBER OF DWELLINGS ENTITLED TO 50% DISCOUNT	0	126	23	36	49	48	56	51	6	395
NUMBER OF DWELLINGS ENTITLED TO 100% DISCOUNT FOR ONE MONTH	0	35	30	40	23	17	7	1	1	154
TOTAL DISCOUNTS	11	4156.9	5267.2	5791.6	5624.82	3074.78	1433.38	819.34	73.34	26252.36
DISCOUNT DEDUCTION	2.75	1039.225	1316.8	1447.9	1406.205	768.695	358.345	204.835	18.335	6563.09
NET DWELLINGS	28.25	5802.775	10637.2	16406.1	17577.795	12469.305	6560.655	4268.165	557.665	74307.91
DWELLINGS SUBJECT TO A PREMIUM (100%)	0	39	18	22	14	8	15	3	0	119
DWELLINGS SUBJECT TO A PREMIUM (150%)	0	13	7	5	7	3	4	4	0	43
ADJUSTED NET DWELLINGS	28.25	5861.275	10665.7	16435.6	17602.295	12481.805	6581.655	4277.165	557.665	74491.41
BAND D EQUIVALENTS	15.7	3907.5	8295.5	14609.4	17602.3	15255.5	9506.8	7128.6	1115.3	77438.7
CTR PENSIONERS	4209.45	804683.68	1219386.45	1240928.01	852111.37	389922.08	115648.98	24384.96	2753.82	4654028.8
CTR WORKING AGE	5356.44	878398.98	1490382.31	1352748.91	408730.38	120435.53	30835.71	8798.08	1161.35	4296847.69
TOTAL CTR	9565.89	1683082.66	2709768.76	2581212.16	1260841.75	510357.61	146484.69	33183.04	3915.17	8950876.49
REDUCTION IN COUNCIL TAX BASE DUE TO PENSIONERS CTR	4.051919037	652.4249875	845.4383891	756.7546699	463.6279898	174.7701487	44.21409845	8.173598751	0.775418145	2950.231219
REDUCTION IN COUNCIL TAX BASE DUE TO WORKING AGE CTR	5.206776754	709.9249815	1031.130588	822.4097173	222.533374	53.52745376	11.65856707	2.926166203	0.313458175	2859.631083
TOTAL REDUCTION IN TAX BASE DUE TO CTR BAND D EQUIVALENTS	5.144444444	908.2333333	1459.554444	1403.715556	686.19	279.0088889	80.73	18.5	2.18	4843.302222
ADJUSTED BAND D EQUIVALENTS	10.6	2999.3	6835.9	13205.7	16916.1	14976.5	9426.1	7110.1	1113.1	72593.4
COLLECTION RATE										98.24%
SUB-TOTAL										71315.8
CONTRIBUTIONS IN LIEU										221.3
TAX BASE										71538.7

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TAX BASES FOR 2021/22 COMPARED TO PREVIOUS YEAR 2020/21

PARISH/TOWN	TAX BASE 20/21	TAX BASE 21/22	MOVEMENT
Ashurst & Colbury	930.5	926.3	-4.2
Beaulieu	518.8	513.1	-5.7
Boldre	1,072.2	1,059.8	-12.4
Bramshaw	344.8	340.4	-4.4
Bransgore	1,829.9	1,825.0	-4.9
Breamore	181.2	180.1	-1.1
Brockenhurst	1,873.4	1,895.9	22.5
Burley	793.0	792.9	-0.1
Copythorne	1,219.7	1,221.0	1.3
Damerham	239.7	239.5	-0.2
Denny Lodge	157.7	164.8	7.1
East Boldre	383.4	383.2	-0.2
Elingham, Harbridge & Ibsley	613.6	619.8	6.2
Exbury & Lepe	110.8	119.4	8.6
Fawley	4,596.5	4,603.5	7.0
Fordingbridge	2,304.6	2,353.2	48.6
Godshill	223.6	227.8	4.2
Hale	266.3	265.4	-0.9
Hordle	2,422.2	2,417.8	-4.4
Hyde	511.4	512.5	1.1
Hythe & Dibden	7,458.1	7,406.1	-52.0
Lymington & Pennington	7,470.9	7,483.2	12.3
Lyndhurst	1,458.4	1,472.8	14.4
Marchwood	2,069.4	2,057.7	-11.7
Martin	198.9	197.2	-1.7
Milford on Sea	2,841.0	2,853.8	12.8
Minstead	376.5	372.3	-4.2
Netley Marsh	809.3	816.1	6.8
New Milton	10,531.3	10,515.3	-16.0
Ringwood	5,362.0	5,404.3	42.3
Rockbourne	167.0	167.3	0.3
Sandleheath	280.0	276.6	-3.4
Sopley	392.7	391.1	-1.6
Sway	1,703.8	1,706.1	2.3
Totton & Eling	9,423.1	9,405.1	-18.0
Whitsbury	101.9	101.1	-0.8
Woodgreen	255.3	251.2	-4.1
Whole District	71,492.9	71,538.7	45.8

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