

## **A Countywide Approach to Meeting the Unmet Housing Need of Oxford**

### **Section 1: Purpose of the Report**

- 1) Public bodies have a Duty to Co-operate on planning issues that cross administrative boundaries.
- 2) A key planning issue in Oxfordshire is how to address the unmet housing need arising from Oxford City identified in the 2014 Oxfordshire Strategic Housing Market Assessment.
- 3) The Oxfordshire Growth Board agreed to establish a working group and a programme of projects to enable agreement to be reached between the Local Authorities on the level of unmet housing need of Oxford City together with an appropriate apportionment that could then be taken forwards through the Local Plans for each District. This programme is called the Post SHMA Strategic Work programme (the Programme).
- 4) This report sets out detail of that Programme, the work streams which were commissioned; how the findings were considered and the conclusions which were reached.
- 5) This report includes a recommended apportionment of the unmet housing need of Oxford.

### **Section 2: Executive Summary**

- 6) In 2013, the Oxfordshire Local Planning Authorities (LPA) commissioned a new Strategic Housing Market Assessment (SHMA), supported by joint working on economic forecasting, to establish the appropriate level of planned growth across the Oxfordshire Housing Market Area and the level of housing need arising in each District. The SHMA had a secondary purpose of helping to inform the preparation of the first Oxfordshire Strategic Economic Plan (SEP) by the Oxfordshire Local Enterprise Partnership (OxLEP).
- 7) Officers from all Oxfordshire authorities met on 17th May 2013 to discuss how the results of the SHMA should be considered, incorporated in emerging plans where possible and used as the basis for further joint working between the Councils. The purpose was to reach agreement and formalise joint working, provide a common basis on which to progress the SHMA and avoiding unnecessary delay to Local Plan preparation.
- 8) In April 2014 the Oxfordshire Local Authorities, published the Strategic Housing Market Assessment (SHMA) for Oxfordshire. The document suggested that the demographic trends and growth of the County economy and the level of affordable housing need required would necessitate 100,060 additional new homes in Oxfordshire between 2011 and 2031.
- 9) In November 2014, the Oxfordshire Growth Board, created by the District Councils and the County Council following the agreement to a City Deal for Oxford, commissioned a

Project team to address the unmet housing needs of Oxford (See Appendix 3 for full details). This Project Team has met regularly to consider the implications of the SHMA and how best to meet the identified unmet housing need of Oxford. This is in the context of recognising that the administrative boundaries of the City of Oxford are constrained and consequently it is seeking effective ways to address this issue in line with Duty to Cooperate.

- 10) This report reviews the process undertaken by all Councils on the basis of the ‘Duty to Cooperate’ and the work streams commissioned (see Appendix 4 for full details), as well as how the separate reports have led to a proposed evidence-based apportionment across the Districts of Oxfordshire to meet the unmet housing need of Oxford using a working figure of 15,000 homes (see section 8 of this report).
- 11) The proposed apportionment is set out in section 8. For each District, the proposed apportionment is:-

	<b>Proposed Apportionment</b>
<b>Cherwell</b>	<b>4400</b>
<b>Oxford</b>	<b>550</b>
<b>South</b>	<b>4950</b>
<b>Vale</b>	<b>2200</b>
<b>West</b>	<b>2750</b>
<b>Total</b>	<b>14850</b>

The Growth Board is requested to endorse the proposed apportionment.

- 12) This report also sets out how the apportionment is to be taken forward in each Local Plan reflecting the different stages of Local Plan preparation (see section 9 of this report). This ranges from the commitment in Cherwell’s adopted Local Plan to complete a Partial Review within two years, the modification of other Submitted Local Plans to meet a proportion of the Oxford unmet need and the review of the Oxford Core Strategy, which has now commenced.

The Post SHMA Project Team  
For the Oxfordshire Growth Board  
September 2016

**Report Author:**  
Adrian Colwell  
Head of Strategic Planning and the Economy  
Cherwell and South Northamptonshire Councils

### **Section 3: Applying the ‘Duty to Cooperate’**

- 14) For resolving the Oxford unmet need issue reliance has been placed on both undertaking and commissioning joint working on the basis of the ‘Duty to Co-operate’.
- 15) The application of the ‘Duty to Cooperate’ by the Oxfordshire Local Planning Authorities (LPA) is informed by the provisions of the Localism Act (2011), National Planning Policies Framework (NPPF, March 2012) and Planning Practice Guidance (PPG, August 2013).
- 16) This section reviews the key sections of the key legislation and associated Framework and Guidance which established the basis for the collaboration between the Councils to address the unmet housing need of Oxford.

#### **Section 3.1: The Localism Act 2011**

- 17) Section 110 of the 2011 Localism Act inserts the Duty to Co-operate as a new Section 33A in the Planning and Compulsory Purchase Act 2004. Section 33A came into effect on 15 November 2011. It is not retrospective.

Section 110 of the Localism Act sets out the new ‘Duty to Co-operate’. The new Duty:-

- relates to “*sustainable development or use of land that has or would have a significant impact on at least two planning areas, including (in particular) sustainable development or use of land for or in connection with infrastructure that is strategic and has or would have a significant impact on at least two planning areas*”;
  - requires that councils and public bodies “*engage constructively, actively and on an on-going basis*” to develop strategic policies; and
  - requires councils to consider “*joint approaches*” to plan making.
- 18) Section 33A (1) and (3) of the 2004 Act impose a duty on a local planning authority to co-operate with other local planning authorities and other prescribed bodies when it undertakes certain activities, including the preparation of development plan documents, activities that can reasonably be considered to prepare the way for such preparation and activities that support such preparation so far as they relate to a strategic matter. This is to maximise the effectiveness with which those activities are undertaken.
  - 19) Section 33A (4) states that a strategic matter is: “*sustainable development or use of land that has or would have a significant impact on at least two planning areas, including (in particular) sustainable development or use of land for or in connection with infrastructure that is strategic and has or would have a significant impact on at least two planning areas.*”
  - 20) Section 33A (2) requires a local planning authority “*to engage constructively, actively and on an on-going basis*” in respect of the activities that are subject to the duty.

#### **Section 3.2: The National Planning Policy Framework (NPPF)**

- 21) Paragraphs 178-181 of the NPPF set out further details on planning strategically across local. The NPPF states that:

*“Public bodies have a duty to cooperate on planning issues that cross administrative boundaries, particularly those which relate to the strategic priorities set out in paragraph 156. The Government expects joint working on areas of common interest to be diligently undertaken for the mutual benefit of neighbouring authorities.”*

*“Local planning authorities should work collaboratively with other bodies to ensure that strategic priorities across local boundaries are properly coordinated and clearly reflected in individual Local Plans. Joint working should enable local planning authorities to work together to meet development requirements which cannot wholly be met within their own areas – for instance, because of a lack of physical capacity or because to do so would cause significant harm to the principles and policies of this Framework. As part of this process, they should consider producing joint planning policies on strategic matters and informal strategies such as joint infrastructure and investment plans.”*

*“Local planning authorities should take account of different geographic areas, including travel-to-work areas. In two tier areas, county and district authorities should co-operate with each other on relevant issues. Local planning authorities should work collaboratively on strategic planning priorities to enable delivery of sustainable economic growth in consultation with Local Enterprise Partnerships and Local Nature Partnerships. Local planning authorities should also work collaboratively with private sector bodies, utility and infrastructure providers.”*

*“Local planning authorities will be expected to demonstrate evidence of having effectively co-operated to plan for issues with cross-boundary impacts when their Local Plans are submitted for examination. This could be by way of plans or policies prepared as part of a joint committee, a memorandum of understanding or a jointly prepared strategy which is presented as evidence of an agreed position. Cooperation should be a continuous process of engagement from initial thinking through to implementation, resulting in a final position where plans are in place to provide the land and infrastructure necessary to support current and projected future levels of development.”*

- 22) Paragraph 156 of the NPPF states that the strategic priorities should include strategic policies to deliver the following:

*“The homes and jobs needed in the area;  
The provision of retail, leisure and other commercial development;  
The provision of infrastructure for transport, telecommunications, waste management, water supply, wastewater, flood risk and coastal change management, and the provision of minerals and energy (including heat);  
The provision of health, security, community and cultural infrastructure and other local facilities; and  
Climate change mitigation and adaptation, conservation and enhancement of the natural and historic environment, including landscape.”*

- 23) Paragraph 182 of the NPPF states that *“The Local Plan will be examined by an independent inspector whose role is to assess whether the plan has been prepared in*

*accordance with the Duty to Co-operate, legal and procedural requirements, and whether the Local Plan is sound.”*

- 24) The NPPF sets out four tests of soundness, two of which expressly relate to the need for cross-boundary co-operation:
- *“Positively prepared – The plan should be prepared based on a strategy which seeks to meet objectively assessed development and infrastructure requirements, including unmet requirements from neighbouring authorities where it is reasonable to do so and consistent with achieving sustainable development;”* and;
  - *“Effective – The plan should be deliverable over its period and based on effective joint working on cross - boundary strategic priorities”.*
- 25) The NPPF thus requires local planning authorities, such as those in Oxfordshire to apply the Duty to Co-operate on planning issues that cross administrative boundaries, particularly those which relate to the strategic priorities.
- 26) The NPPF stresses that joint working on areas of common interest must be diligently undertaken for the mutual benefit and should work collaboratively to ensure that strategic priorities across local boundaries are properly co-ordinated and clearly reflected. This joint working should, for example enable local planning authorities to work together to meet development requirements which cannot wholly be met within their own areas.
- 27) The NPPF advocates that the Duty to Co-operate should be a continuous process of engagement, in which evidence of effective cooperation on issues with cross-boundary impacts such as a memorandum of understanding or a jointly prepared strategy might accompany Local Plans that are submitted for examination, as evidence of an agreed position.
- 28) The commitment of the Oxfordshire Growth Board to the process of addressing the unmet need of Oxford, demonstrated by this report, together with the participation by all Councils in the Programme and the publication of the commissioned studies and reports shows how the joint consideration has been fully applied.
- 29) In responding to the unmet housing need arising from Oxford, individual Councils need to be able to demonstrate that they have complied with the Duty to Cooperate and associated NPPF requirements.

### **Section 3.3: The National Planning Practice Guidance (NPPG)**

- 30) The PPG makes clear that co-operation with other bodies: -

*“should make Local Plans as effective as possible on strategic cross boundary matters. They should be proportionate in how they do this and tailor the degree of cooperation according to where they can maximise the effectiveness of plans.”* (ID 9-004-130729).

*“Local planning authorities are not required to reach agreement about the planning strategy before they submit their Local Plans for examination.”* (ID 9-016-130729)

- 31) In short, every effort must be made to secure cooperation on cross border issues. Local Planning Authorities must engage constructively, actively & on an on-going basis and there must be effective & deliverable outcomes.
- 32) Whilst the Project Team considering the unmet need of Oxford is not preparing a Development Framework document, the Oxfordshire Councils have demonstrated that the Duty to Co-operate, as set out in the Localism Act, NPPF and PPG, has been met in depth through the completion within the Programme of a series of work streams that have produced significant evidence in support of the apportionment of the unmet housing need of Oxford.
- 33) Following consideration of this report and its accompanying studies and reports on the individual work streams, the apportionment to each District will be taken forward through individual Local Plan Reviews (Cherwell and Vale), or new Plans (Oxford, South and West). The agreed apportionment and the evidence providing appropriate justification for that apportionment will be used by each Local Planning Authority in support of their Local Plan making process at the District level, which will follow this joint work.
- 34) The process of collaboration and joint working will continue between the Councils after the completion of the work of the Project Team to prepare a recommendation for the apportionment of the unmet housing need of Oxford.

#### **Section 4: Governance and Process**

- 35) Although the 'Duty to Cooperate' provides a statutory framework for joint working to address cross boundary planning issues, there is an absence of formal national guidance as to the precise process to follow in considering unmet housing need within the SHMA area.
- 36) Using the advice received from Mr Keith Holland, a Planning Inspector seconded to the DCLG to advise local planning authorities on Duty to Co-operate issues, the Oxfordshire Growth Board agreed a Post SHMA Strategic Work Programme (the Programme) to enable Councils to work positively and constructively on this strategic issue.
- 37) This Programme has led to this report, but it is important to stress that it is not a formal planning process and its outputs will not be a Statutory Planning Document. However, this report and the reports from the work streams associated with it will be 'material considerations' for the development of the Local Plans that follow its consideration.
- 38) This report, together with accompanying shared evidence and studies will help inform the future Local Plan Reviews led by the City and District Councils to address how the apportionment is allocated into deliverable and justified Local Plans. The individual Local Plan Review processes will provide extensive opportunities for public and stakeholder engagement, and will further test the outcomes of the Programme. The statutory plan-making process will also consider all 'reasonable alternatives' for meeting the apportionment and ensure that sustainable development can be achieved.
- 39) Historically, collaboration on strategic planning between the Councils of Oxfordshire was already well developed due to the collaboration on a range of issues driven through the Spatial Planning and Infrastructure Partnership (SPIP), the Oxfordshire Planning Policy Officers group (OPPO) and more recently through the Oxfordshire Growth Board.
- 40) To oversee the development of the Programme, a Post SHMA Strategic Work Programme Project Team (the Project Team) was established by the Oxfordshire Growth Board. The Project Team included all District Councils and the County Council, with input from the Environment Agency and HCA on an on-going basis.
- 41) The Project Team is chaired by the council currently chairing the Growth Board. The list of former and current chairing authorities is included in Appendix 1. The Project Team reports to the Oxfordshire Growth Board and its Executive Officers Group. The Project Team through the appointment of a Programme Manager oversaw the Programme at fortnightly meetings and delivered regular progress reports on the Programme to the Growth Board Executive Officer Group (EOG) and Board. Reports were considered at each of its meetings from November 2014 onwards (See Appendix 2).
- 42) Whilst the Programme's outputs offer an apportionment and an objective basis for arriving at this conclusion, decisions on the final allocations of sites to meet the unmet housing need of Oxford will be matters for each District Council to consider through its Local Plan making process.

## Section 5: Using the Oxfordshire SHMA

- 43) Local Planning Authorities have a statutory duty to prepare and maintain an up-to-date Local Plan, which sets out the proposed scale and location of development in the area over the next 15 to 20 years and in doing so seeks to balance economic, social and environmental considerations.
- 44) Part of the essential evidence base for a Local Plan is an assessment of the likely future growth of employment, and of the requirement for new homes. The expected scale and characteristics of employment growth are usually assessed using econometric forecasts which take into account past trends and policy changes. The housing requirement is assessed through a Strategic Housing Market Assessment (SHMA), which should be produced for the functional housing market area, and which is required by the National Planning Policy Framework (NPPF) to be kept up to date.
- 45) In considering Objectively Assessed Needs, the Councils are following the provisions of the NPPF, Para 47 requires –
- “To boost significantly the supply of housing, local planning authorities should...use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area, as far as is consistent with the policies set out in this Framework, including identifying key sites which are critical to the delivery of the housing strategy over the plan period...”;*
- 46) The NPPF also states in paragraph 159: -
- “Local planning authorities should have a clear understanding of housing needs in their area. They should:*
- Prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries.”*
- “Should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:*
- meets household and population projections, taking account of migration and demographic change;*
  - addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes)”*
- 47) In Oxfordshire, all six local authorities, including the County Council, decided jointly in 2013 to commission a SHMA for the whole County, within which the requirements for individual districts were identified. The work was led by the consultants GL Hearn. Separately, the forerunner of the Growth Board, the Spatial Planning and Infrastructure Partnership (SPIP) commissioned employment growth forecasts from Cambridge Econometrics, in association with SQW, in order to inform the development of the Oxfordshire SHMA and the Local Plans on which it would be based. The methodology used to produce the Oxfordshire SHMA was consistent with Government guidance and



the housing requirements identified took account of forecast employment growth as one factor influencing future housing needs.

- 48) There was a consultation on the SHMA methodology and all local authorities subsequently accepted the final report of the SHMA for publication in April 2014 as the up to date housing market assessment for Oxfordshire.
- 49) The robustness of the SHMA has been tested at the Cherwell Local Plan Examination in Public in 2014 the first in Oxfordshire. The Inspector's report of June 2015 concluded that it formed an appropriate basis for the proposed level of housing growth in Cherwell. This effectively endorsed the SHMA as a sound evidence document which now underpins the development of Local Plans in Oxfordshire. However, it remains for individual authorities to test the SHMA results and its application in their respective local circumstances and to determine whether their Local Plans can sustainably accommodate development to meet the housing need identified.
- 50) The need identified in the SHMA for Oxford City has been accepted by the Councils as the basis of the subsequent work overseen by the Project Team to identify the level of unmet need and an appropriate apportionment between the neighbouring Councils.

## **Section 6: The Post SHMA Strategic Work Programme**

- 51) A set of key principles, approved by the Growth Board in November 2014 – see Appendix 3 – underpin the Programme. The principles are:
- The district Local Plans are sovereign and all work should feed into Local Plans for them to determine the spatial future of the districts;
  - A recognition however that the work must be collaborative and joined up to provide a county wide spatial picture and strategy;
  - A recognition therefore that joint work on future spatial options, transport infrastructure and green belt will be required to feed into Local Plans;
  - Recognition that the City cannot fully meet its housing needs and there is a need to agree on the level of unmet need. However, work on determining spatial options in Local Plans can commence alongside this;
  - A wish that the timescale for completing the Review is 12 – 18 months and that this should not hold up Local Plan timescales.
- 52) The Programme agreed by the Growth Board was designed to test a range of potential strategic options to meet the unmet housing needs of Oxford City, in order to determine the apportionment of this unmet housing need between the City and District Councils.
- 53) As noted in section 7.1 of this report, the Programme commenced with a consideration of the capacity of Oxford City to meet its own need and then to consider a range of strategic spatial options for growth, called areas of search, identified by individual districts and the County Council as being reasonable and worthy of consideration in terms of both their deliverability and relationship to Oxford. The criterion for identifying sites to be tested is listed in section 7.3 of this report. Separate studies considered the Green Belt as well as transport infrastructure and these informed the appraisal and assessment of the spatial options. All of the work streams were subject to check and challenge by partners.
- 54) This Programme does not allocate sites. The Programme demonstrates the ability of each District to deliver a range of sites that can be shown to closely relate to Oxford and thus to enable the unmet housing need of Oxford to be apportioned in a manner which would deliver development which is sustainable over a realistic time period. The identified areas of search are not intended as an exhaustive list and the final allocation of any development sites within these areas will be up to individual Local Plans to take forward, taking into account wider detailed planning considerations, and the fit with proposed local strategies and potentially a wider set of 'reasonable alternatives'.
- 55) Each of the studies considered a set of thematic issues relating to the areas of search and in particular the relationship of the areas of search to Oxford City, given the Programme was concerned with considering how best to apportion the unmet need of Oxford. Reconciling the tension between a spatial strategy developed for each District with those options judged most appropriate to meet Oxford's unmet housing need, i.e. the judgment about which areas and sites within them serve each District's needs and

those which serve Oxford's, are matters for each District to address through the Local Plan making process after the apportionment has taken place.

- 56) To provide an independent view of the robustness of the Programme arrangements were made through DCLG for a senior representative of the Planning Inspectorate to attend a workshop session with EOG in February 2016. Mr Keith Holland had previously provided advice to the authorities on the Duty to Co-operate and was now asked to review the Programme. He endorsed the Programme as meeting the Duty to Co-operate from a legal perspective and being appropriate under the circumstances, recognising the differing positions and starting points of the respective partner authorities.
- 57) The working group commissioned 6 individual work streams to inform the apportionment. These work streams considered: -
- The Urban Capacity of Oxford.
  - The Study of the Oxford Green Belt.
  - Spatial Options Assessment Project.
  - Transport Infrastructure Assessment.
  - Education Impact Assessment
  - High-Level Habitats Regulation Assessment.
- 58) Appendix 4 sets out the Post SHMA work programme, its key steps and dates.

## **Section 7: The Development of the programme work streams**

59) The development of each work stream and its conclusions included the following: -

### **Section 7.1: Work stream - The Urban Capacity of Oxford**

- 60) An important first work stream of the Programme was to clarify the extent to which Oxford's housing need that could be accommodated in Oxford City itself. This was done by reference to the published Oxford Strategic Land Availability Assessment (SHLAA), a study of the available housing capacity of Oxford commissioned by the City Council.
- 61) An independent consultancy, Fortismere Associates (FA) were appointed *'to review the Oxford City SHLAA, to satisfy partners that the assessment of the ability to meet the stated level of unmet housing need is correct in two respects: a) In the context of existing policies; and b) In the context of a consideration of reasonable adjustments to existing policy that Oxford City could consider, whilst maintaining consistency with the NPPF.'*
- 62) FA reviewed a range of existing documentation on this issue and recommended a way forward. These documents included the Oxford SHLAA and the Cundall report (a critique of the City Council's SHLAA) commissioned by South, Vale and Cherwell, plus the Oxford City response to this report. The aim was to secure agreement to a single figure or narrower range as a working assumption for the unmet housing need of Oxford City, in order to inform the assessment of the proposed spatial options.
- 63) The report concluded that Oxford City Council's approach to assessing its housing supply is compliant with government policy and guidance (NPPF, PPG). It also identified a number of matters that Oxford City Council was recommended to consider in order to increase its housing capacity and so that it has *'left no stone unturned'* in seeking to meet as much of its housing needs within the City as possible.
- 64) Following consideration of the Fortismere report, at its meeting held in November 2015 the Oxfordshire Growth Board approved *'that the working assumption of 15,000 is a working figure to be used by the Programme as a benchmark for assessing the spatial options for growth and is not an agreed figure for the true amount of unmet need'*.
- 65) Subsequent to this decision the City Council commenced its review of its Local Plan in spring 2016. The recommendations from the Fortismere report will be considered through that process.
- 66) The report from the critical friend has been finalised and published on the web site of the lead authority at the time of the completion of the study.

### **Section 7.2 Work stream - The Study of the Oxford Green Belt**

- 67) The Consultancy, Land Use Consultants (LUC) was commissioned to undertake an assessment of the Green Belt within Oxfordshire. The Study was overseen by a Steering Group comprising officers of the local authorities.
- 68) The overall aim of the Study was to assess the extent to which the land within the Oxford Green Belt performs against the purposes of Green Belts, as set out in paragraph 80 of the National Planning Policy Framework (NPPF):
- *to check the unrestricted sprawl of large built-up areas;*
  - *to prevent neighbouring towns merging into one another;*
  - *to assist in safeguarding the countryside from encroachment;*
  - *to preserve the setting and special character of historic towns; and*
  - *to assist in urban regeneration, by encouraging the recycling of derelict and other urban land.*
- 69) The NPPF attaches great importance to Green Belts and stresses that their essential characteristics are ‘*openness and permanence*’. It also advises that, once established, Green Belt boundaries should only be altered in exceptional circumstances through the preparation or review of a local plan.
- 70) The brief emphasised that the Study should not advise on the suitability or potential of land in the Oxford Green Belt for development. However, the outputs of the study, alongside other assessments will assist local authorities in considering the extent to which some existing Green Belt land could be used to accommodate sustainable forms, patterns and types of new development. Should the local authorities conclude that there are ‘exceptional circumstances’ for making alterations to the existing Green Belt boundaries, these changes, including any allocations of land for development, will be taken forward through the Local Plan-making process in each District where evidence would be provided to set out the case for the ‘exceptional circumstances’ in line with national policy
- 71) The Study did not have regard to environmental, policy or land-use constraints and designations that may exist within the Oxford Green Belt, such as landscape areas, SSSIs, and floodplains - except insofar that these are considered to be relevant to the purposes of Green Belts.
- 72) The published report is structured in the following Chapters:
- Chapter 2 sets out the context to the Study, in terms of planning policy and the evolution and character of the Oxford Green Belt.
  - Chapter 3 describes the Study methodology, including the criteria used to assess the Green Belt.
  - Chapter 4 reports the findings of the Study.
  - Chapter 5 sets out the conclusions of the study and recommendations on the next steps.
- 73) The study assessed the contribution that separate identified land parcels within the Green Belt make to the purposes of the Green Belt according to the five purposes of Green Belt suitability for the first time since the establishment of Oxfordshire Green Belt

in the 1970s. The Programme acknowledges that it is important that the study looks at the Green Belt as a whole to provide a common basis for assessment, whilst fully taking into account work which may have been previously undertaken by individual districts

- 74) The study does not propose areas for release from Green Belt but does allow individual councils, alongside challenge from partners to consider whether Green Belt land could be included as part of the areas of search that formed the basis of the allocation of Oxford's unmet housing need. In this way the study will, in combination with the Strategic Options Assessment, help to identify the potential, or not, for development, and the case for additional areas to be added to the Green Belt.
- 75) The report has been published on the website of Cherwell DC at:  
<http://modgov.cherwell.gov.uk/mgCommitteeDetails.aspx?ID=528>
- 76) The final report of the Green Belt assessment forms both a contribution to this report and also evidence for consideration through the Local Plan process at each District.

### **Section 7.3: Work stream - Spatial Options Assessment Project**

- 77) A key early element of the Programme was the identification of areas of search as strategic options for growth by City and District partners. Initially, in accordance with the 'bottom-up' approach, this was left to the individual authorities to identify the strategic options within their own districts that would then be taken forward for further testing, though for South Oxfordshire and Vale of White Horse Districts, the initial set of options was prepared by the County Council.
- 78) The areas of search are intended to be high level areas for development consideration rather than precisely defined sites with an agreed minimum threshold of 500 dwellings and a clear relationship to Oxford in terms of proximity and accessibility. Essentially the list was a thorough and plausible range of options, but not an exhaustive assessment of every option in each District as that consideration will follow later through the individual Local Plan making process.
- 79) A consultancy partnership, Land Use Consultants (LUC), and BBP Regeneration were commissioned to carry out a Spatial Options Assessment for meeting the Oxford's unmet housing need up to 2031.
- 80) Their role was to test the strategic options identified against a number of agreed criteria to assess their 'relative' sustainability at a strategic level, though a full Sustainability Assessment was not judged to be necessary as the process was not allocating specific sites.
- 81) These criteria included a number of sustainability issues such as infrastructure, water supply, flooding, green belt etc. Importantly it ensured a common approach was taken to the density of proposed options and also tested the suitability of the areas of search against the primary requirement of the Programme to meet the housing needs of Oxford City, for example by physical proximity or public transport links.
- 82) The agreed Methodology for the assessment included: -

- The development of an initial list of spatial options by each district, either by the districts themselves or the partners on their behalf.
  - A Check and Challenge workshop on 30th October 2015, where the initial list was refined to a long list of potential strategic areas of search for growth which had a closer relationship to Oxford and were thus seen to be more credible options to consider through this process. This long list was agreed by all the partners to be taken forward for assessment in the Spatial Options Assessment Project.
  - The testing by the consultants of the long list of potential strategic areas of search for growth against an agreed set of criteria.
  - A Check and Challenge workshop to examine the results of the assessment process was also held on the 15th April 2016 to consider the emerging conclusions of the assessment.
- 83) The overall aim of the Spatial Options Assessment was to provide a criteria-based analysis of the spatial options for meeting Oxford's unmet housing need. The brief was to develop and implement a methodology for testing spatial options which can meet Oxford's unmet housing need, either in part or in whole, thus providing guidance and evidence to inform decisions on how this unmet need might best be apportioned across the county.
- 84) The initial list of options from partners included a number of options that were subsequently judged by the working group to be unreasonable and less directly related to the city than the 36 options that were subsequently considered in more depth and were thus rejected. These included sites at places such as Appleford, Carterton, Faringdon, East Hanney, Grove and land west of Long Hanborough. As paragraph 127 of this report notes, one further option was discounted later in the assessment.
- 85) This report does not make specific recommendations about which options should or should not be taken forward. Its purpose was instead to determine whether the spatial options could be considered to be potentially sustainable in broad terms for the purpose of identifying a reasonable and comparable understanding of district housing potential to help inform an apportionment. Spatial options were identified and considered without prejudice to the subsequent Local Plan processes.
- 86) The LUC Spatial Options Study commenced with baseline economic, environmental, social and transport information being gathered and collated. This baseline informed the later assessment of spatial options, and helped to inform judgements on a comparative basis between each District about the likely effects of the options on social, environmental and economic issues in Oxfordshire.
- 87) LUC and BBP were asked to propose consistent assumptions to apply to the options covering , for example density, affordable housing, infrastructure provision and development trajectories, this was to ensure they were considered in a consistent manner This was because securing a comparative assessment on a District- by- District basis is difficult to achieve as each LPA uses slightly different assumptions for its Local Plan processes

- 88) An assessment framework was developed by LUC and BBP in consultation with a project steering group, which included sustainability assessment criteria, criteria for assessing the deliverability and viability of options, and specific criteria relating to assessing landscape impact and the Green Belt. A scoring scale, similar to that which is commonly used in Sustainability Appraisals, was used to assess each spatial option against each criterion in the sustainability assessment framework.
- 89) One significant aspect of this study is that *'The Spatial Options Assessment includes an assessment of the sustainability of each area of search, as well as an assessment of their deliverability and viability. Although similar in principle and purpose, the sustainability assessment does not constitute a formal Sustainability Appraisal.'* And partners note that a full Sustainability Appraisal will be required of the Local Plans prepared that apply the agreed apportionment on a District basis.
- 90) Each of the 36 spatial options was assessed by LUC in terms of its likely effects on each sustainability, landscape and Green Belt assessment criterion. This was done initially through a desk-based approach concluding with a 'RAG' assessment (Red-Amber-Green) showing a range of anticipated effects from 'significantly negative' to 'significantly positive', to enable a comparative judgement to be reached. At the same time, the deliverability and viability assessment for each spatial option was carried out by BBP. Site visits were used to inform the sustainability and landscape sensitivity assessments although they were not used in the assessment against the Green Belt criterion as this has been the subject of a separate study.
- 91) Each of the spatial options was assessed against the range of assessment criteria grouped into four categories:
- Sustainability (comprising spatial relevance to Oxford, social and economic criteria, and environmental criteria).
  - Landscape.
  - Green Belt.
  - Deliverability and viability.
- 92) One critical matter that the Spatial Options Report considered was the recognition by BNP that deliverability of allocated sites was considered on a comparable basis between the different Districts, with an assumed start date of 2021 for the commencement of development. This assumption does not preclude earlier delivery, but does recognise the complexity of the issues being considered and has sought to factor in reasonable lead times to enable options to come forward and to be fully considered through the subsequent Local Plan process.
- 93) Chapter 8 of the Study sets out its conclusions. These have been carefully considered by the project Team and played a significant role in influencing how the overall site conclusions set out in Appendix 5 were reached together with the other studies. Given their importance and for ease of reference they are reproduced here in full:-

*'Spatial relevance to Oxford*

*The assessment of the spatial options generated a mix of positive and negative effects for the criteria relating to spatial relevance to Oxford, although 13 spatial options that are either within Oxford City or within close proximity of the City*



*boundary were considered to have only minor or significant positive effects. The effects of each of the spatial options on those criteria assessing accessibility are broadly similar, as where an option is well-connected to one of the features assessed (i.e. cultural offer of Oxford, educational institutions or employment nodes), it also tends to be well-connected to the others.*

#### *Social and economy*

*The spatial options were found to result in mostly positive effects for the social and economic criteria relating to provision of housing (including affordable housing) to meet Oxford's need, access to healthcare and education and on site employment provision as development on any of the spatial options would deliver more homes and be likely to also enable enhanced or new healthcare and education provision, and some on site employment opportunities. However, there is a more mixed picture for the spatial options in terms of access to existing facilities and services as this depends on the proximity of each spatial option to local centres.*

#### *Environmental*

*The assessment found that there would generally be more negative effects for the environmental criteria as many of the spatial options would involve development of greenfield land, which could increase impermeable surfaces (contributing to flood risk), result in the loss of good quality agricultural land and have impacts on the landscape. Most of the spatial options are also within close proximity of either locally or nationally/internationally important nature conservation sites or heritage designations, which could result in adverse impacts on these assets. Conversely, positive effects are more likely in relation to the provision or enhancement of green infrastructure because large-scale development at the spatial options that would be new settlements or village, town or urban extensions would be able to incorporate good amounts of green infrastructure.*

#### *Landscape*

*The majority of the spatial options were assessed as either medium (14 spatial options) or medium-high (13 spatial options) with regards to overall landscape/visual sensitivity. No spatial options were assessed as having high overall landscape sensitivity. Only two of the spatial options were assessed as having low overall landscape sensitivity. Generally, the spatial options have a higher sensitivity with regards to the settlement form and edge, settlement setting and views criteria.*

#### *Green Belt*

*15 of the spatial options are not within the Oxford Green Belt, including all of the West Oxfordshire options, most of the Oxford City options, one each in Cherwell and South Oxfordshire, and three in Vale of White Horse. Conversely, most of the spatial options in Cherwell, South Oxfordshire and the Vale of White Horse are in the Oxford Green Belt, as is the Horspath Site within Oxford City boundary and some of the land parcels within the Oxford Enhanced Growth Option. Some of the spatial options score highly against at least one of the four purposes of the Green Belt assessed in the Green Belt Study. It will be for the authorities to determine how this influences the sites taken forward in their respective local plans.*

### *Deliverability*

*Generally, the evidence indicates good levels of demand for new homes and residential development land in Oxford and surrounding areas, particularly those with good transport connections to the City. The key factors which have influenced the assessment of deliverability are the availability of spatial options and the prospects of delivering the strategic transport infrastructure. Four of the spatial options within Oxford were assessed as unlikely to be available.*

### *Viability*

*Generally, large scale residential sites in close proximity to Oxford will be viable unless there are exceptional levels of abnormal costs or expensive strategic infrastructure requirements which are unlikely to be funded. In the most part the spatial options have been assessed as 'Orange' for Viability. Five spatial options were assessed as 'Green' on the basis that it is reasonable to assume strategic infrastructure can be delivered and that there will be sufficient land value uplift to fund other infrastructure whilst leaving sufficient margins for landowners and developers.*

### *Taking the findings forward*

*There is more than enough capacity within these spatial options to meet Oxford's unmet housing need and a number of the spatial options within each of the local authorities have been identified as relating well to Oxford with good existing and future access to the cultural offer, universities and key employment locations in the City. However, some of these options are in the Green Belt, or may have deliverability and viability issues, therefore choices need to be made regarding which, if any, options to take forward for consideration through each authority's Local Plan process. This could involve a combination of smaller and larger sites, spread across the five authorities, or clustered around key sustainable transport links (existing or proposed).*

*The Spatial Options Assessment has assessed each site separately on its own merits. When deciding which, if any, sites to include in their Local Plans to meet Oxford's unmet housing needs, consideration should be given to the merits or otherwise of bringing forward a combination of sites in order to provide a co-ordinated approach to the planning and delivery of development. In carrying out this work, consideration will need to be given to the cumulative effects of bringing forward sites in close proximity, or on the same transport corridors, on traffic congestion and the highways network, as well as on existing community infrastructure, facilities and services. Considering sites in combination may provide opportunities to address such issues in a strategic way, for example by aggregating developer contributions, and/or by providing greater leverage to secure funding from other sources in order to deliver infrastructure improvements, including improved public transport services, highways improvements, cycle ways, and the provision of community facilities, such as health, education, leisure, sport and open space, and retail. It will therefore be important for the local authorities to continue to work together to ensure that the proposals coming forward are supportive of one another.*

*Similarly, new development will need to be carefully planned and designed to integrate with existing development and communities, rather than be stand-alone*

*sites, particularly where the development of new sites can help to address regeneration objectives for existing areas, and where there are opportunities to create integrated sustainable transport, green infrastructure, sustainable drainage, and investment in upgrading and increasing the capacity of existing community facilities. A key ingredient to the successful design and delivery of new development will be the engagement of existing local communities, who can help to identify their needs and priorities, and shape the development to be delivered.'*

- 94) These are conclusions that significantly informed how the Project Team drew together the conclusions of the LUC Study with the conclusions of other different studies, assessed the spatial options considered and arrived at the final apportionment of Oxford's unmet housing need
- 95) The apportionment and its associated evidence base will now be taken forward and considered through the Local Plans for each District, following the agreement of the apportionment by the Oxfordshire Growth Board
- 96) The LUC Report is to be published alongside this Report to the Growth Board.

#### **Section 7.4: Work stream - Transport Infrastructure Assessment**

- 97) Recognising that the options for considering the locations for meeting the unmet need of Oxford may compound existing transport infrastructure challenges the Project Team commissioned consultancy Integrated Transport Planning Ltd (ITP) to consider the transport implications of emerging spatial options.
- 98) ITP were commissioned to prepare a high-level assessment of the transport implications of development at of the 36 sites in Oxfordshire that could potentially accommodate the working assumption of Oxford City's unmet housing need to 2031 of circa 15,000 homes.
- 99) As detailed in the study, the agreed methodology was to: -
- Apply a seven-point metric to the areas of search under consideration and relate each area to census based 'super output areas' to enable travel patterns from each to be considered and extrapolated from comparable local circumstances.
  - Take account of the location of potential areas of search sites and travel to employment sites in the City too, recognising that the purpose of the study is to consider how spatial options might relate to Oxford, rather than other options that are less well related to Oxford.
  - Take account of travel times on existing and planned routes. Priority placed on public transport, walking and cycling; as well as taking account of committed transport schemes and emerging plans from the County Council as Highways Authority as set out in the Local Transport Plan.
  - Begin to consider cumulative challenges and opportunities for new investment within corridor routes from sites being considered

100) It was prepared in order to feed into an initial Check and Challenge workshop on 15th April 2016 led by LUC as part of their wider work to consider the general viability of the 36 different areas of search for accommodating Oxford's future unmet housing need. Based on comments and questions at this workshop an updated high-level assessment was prepared for consideration at a Project Team meeting on 12th May 2016. The study was subsequently updated to include refined housing number trajectories (to 2031) and 30 minute travel time accessibility calculations for jobs in Oxford.

101) The Technical advice included the following:

- Maps showing the 36 areas of search considered, and the scale of potential housing development associated with each one.
- A Red/Amber/Green analysis against the methodology agreed with the Oxfordshire Growth Board. Each area has also been assessed against a set of eight transport-related metrics.
- A summary of key datasets and assumptions used to complete this assessment, with cross-references to the appended evidence base.
- A summary of potential next steps that could be pursued in respect of defining packages of areas of search, by considering areas within known transport corridors to accommodate Oxford City's unmet housing need and supporting transport schemes.

102) The report of the ITP assessment forms a key contribution to this report.

103) The Project Team recognised that the response to the impact assessment will be a matter for the subsequent Local Plan processes to address; as the individual sites brought forward to meet the unmet housing need of Oxford may change as this local work is undertaken.

104) The consideration through the individual Local Plans of the preferred location of sites to meet the unmet housing need of Oxford will require testing through the Oxfordshire Strategic Transport Model (STM) to assess the impact of a preferred strategy (or a small number of option packages).

105) This modelling will ensure each Local Plan has a full understanding of the overall quantum or collective impact of the locally proposed scenario on top of existing locally planned growth, to which additional growth will add along existing transport corridors which cross more than once District such as the A34, A40, A44 etc. This modelling will continue to be undertaken on a Cooperative basis.

106) The final ITP Report is to be published alongside this Report to the Growth Board and will also form evidence for consideration through the Local Plan process at each District.

## **Section 7.5: Work stream - Education Impact Assessment**

107) High levels of additional housing growth generate the need for new education provision, which has complex catchment issues to address and in the case of secondary provision

can be expensive to provide and potentially contributions from more than one strategic development.

108) To ensure these issues were considered at an early stage Oxfordshire County Council conducted a high level assessment of the implications for the provision of primary and secondary school places from the potential development of the 36 identified spatial options for accommodating Oxford's unmet housing needs which were generated through the Post SHMA Strategic Work Programme.

109) The report contained the following elements:

- A review of existing and projected school capacity, including new schools already planned to support growth allocated in existing and emerging local plans.
- The location of the spatial options in relation to existing and already planned new capacity.
- A summary of the issues impacting on planning and delivery of new schools provision.
- The assumptions used in assessing the education implications of the spatial options and proposed provision.
- A 'RAG' assessment of the education implications of the spatial options.

110) These assessments were used to help filter out spatial options which could lead to infrastructure carrying a higher risk of being financially unviable, being undeliverable due to reliance on other sites coming forward and/or of rendering development unviable due to cost per dwelling. The assessment recognises that the potential spatial options would change as the individual Local Plans consider a wider range of options.

111) The final report from Oxfordshire County Council is now complete and will inform the Local Plan process at each District.

## **Section 7.6: Work stream - High level Habitats Regulation Assessment (HRA)**

112) The project team also agreed to commission a high level, cumulative HRA screening.

113) The working group agreed that the outcome of the HRA screening will *not* directly influence the apportionment (because decisions on where the need should be met are for the Local Plan process to agree), but will be progressed on a Duty to Cooperate basis and the completed work will feed into on-going Local Plan processes which are responsible for determining how the apportioned unmet need is met / distributed within each district.

114) The HRA considerations being explored include:

- Consultation with Natural England on the proposed scope and objectives of the assessment and to obtain written agreement to the approach being taken.

- The need to ensure the potential effect on ground water / water tables, sensitive water environments and on protected habitats.
  - The need to avoid pre-determination of decisions that it is more appropriate to take through the individual Local Plans.
  - The important focus of the work being the potential cumulative (and synergistic) effects of growth.
  - The need for growth will also be tested without planned transport infrastructure in place.
  - The need to take into account committed and emerging growth from all the District Councils (and potentially arising from any significant minerals and waste development).
- 115) In defining the eight traffic scenarios are to be tested, consideration will be given to how the County's transport infrastructure strategy, particularly based on Rapid Transit/Park & Ride could help reduce pressure on the network.
- 116) The assessment will consider the SHMA baseline end date of 2031 (whilst recognising that some Local Plan periods will extend beyond that date).
- 117) The final report from Atkins is awaited and will inform the Local Plan process at each District.

#### **Section 7.7: Additional Countywide infrastructure issues**

- 118) Officers have also undertaken additional detailed discussions with key stakeholders such as the Environment Agency, energy suppliers and the HCA about the implications of the development within the spatial options for utilities provision and water stress.
- 119) At its meeting in May 2016 the Growth Board approved the commissioning by the County Council of an Infrastructure Delivery Framework to consider the wider strategic infrastructure investments required to ensure that transport, grid and water challenges of growth are more fully considered and can be addressed over the medium term..
- 120) The final report from Oxfordshire County Council once completed in the autumn 2016 will help inform the Local Plan process at each District.

## **Section 8: The Final Apportionment**

- 121) The Strategic Options Assessment together with the other studies has informed the proposed apportionment of Oxford's unmet housing need between the District Council areas. This will also be set out in a Memorandum of Cooperation to be approved by the Growth Board and which will feed into subsequent Local Plan Reviews.
- 122) This report from the Project Team and accompanying reports from the work streams have been published as a single package of reports documenting the process carried out and the technical evidence underpinning the Statement of Cooperation.
- 123) The Project Team considered the conclusions and outcomes of the LUC assessment of the long list of 36 areas of search for growth and the infrastructure assessment, in order to reduce the areas of search to a proposed final shortlist to inform the apportionment.
- 124) The technical assessment by the Project Team has sought to indicate a figure for each District to be apportioned, based upon those areas of search that are reasonable to consider as the basis for that apportionment.
- 125) In assessing the conclusions of the LUC Spatial Options Assessment Project, the Project Team has drawn on the first 9 criteria as a key reference. This was because those criteria relate the most to an area of searches relationship to Oxford (such as the relationship to key employment sites in the City and to the Universities). The group has also considered the other findings of the LUC report and the other studies.
- 126) The Project Team considered the issues of alternative use and deliverability (including on a comparable basis over the period 2021-2031) in its assessment. This has meant, for example, that if an area of search has within it a site in an advanced stage of planning for a non-residential purpose this was seen as a "show stopper". However if there was simply an aspiration for an alternative use or landowner reluctance these would not be considered as material for the purposes of the assessment. The Project Team's deliberations in this context are detailed in the narrative in Appendix 5.
- 127) In considering the 36 areas of growth assessed by LUC it was recognised that the 'enhanced growth scenario for Oxford City' needed to be excluded as its infrastructure requirements and deliverability/viability had already been addressed through the Oxford SHLAA and was thus already factored into the 15,000 figure for the unmet need of Oxford. This option was thus discounted and the final apportionment was based on the consideration of the assessment of 35 options and the consideration of them through the various studies.
- 128) The aim was to confirm a short list of areas of search, with a further list of areas of search judged to have potential to make a contribution, but with issues to resolve or consider.
- 129) The Project Team split the areas of search into the most sustainable areas of search and identified as 'green' and those rejected and identified as 'red'.
- 130) Those areas of search classed as 'amber' at an initial Project Team assessment meeting, held on the 6<sup>th</sup> June 2016 were then subject to further consideration at a special joint meeting of the Project Team and the Growth Board EOG on the 13<sup>th</sup> June

2016 with all partners offered the opportunity to distribute additional information to enable further debate.

- 131) Following the agreement of a proposed short list and apportionment, further more detailed countywide work commenced that will complement the subsequent Local Plan processes, for example a high-level Habitat Regulations Assessment (HRA), and the cumulative impacts of the shortlist on education provision.
- 132) The Growth Board should note that whilst the apportionment is a recommendation, this list of areas of search that underpins should only be viewed as input to the process rather than an output. This is because, although the Project Team based the Programme upon officers' collective existing knowledge of areas of search that would be most suitable to meet Oxford's unmet need, subsequent Local Plan work may bring other sites forward.
- 133) The Programme is not seeking to allocate or release sites, but has at a high level and using a common basis, through the work streams; identify the evidence of each district's ability to absorb additional growth to meet a share of Oxford's unmet need. It will be for each of the districts through their normal Local Plan processes to allocate sites sufficient to meet their proposed share of Oxford's unmet need under the requirements of the Duty to Co-operate.
- 134) It is also important to note that the yield figures for each area of search represent estimated housing numbers to be delivered by 2031 – total capacities at a number of these sites may change through local assessment as part of the more detailed Local Plan process, taking a wider range of planning factors into account, including the potential to deliver further housing beyond 2031.
- 135) The detailed results for each of the areas of search that were considered in developing the apportionment are set out at Appendix 5.
- 136) The categorisation from the spatial options considered is set out below:

	Total considered	Shortlisted 'green' areas of search	Amber areas of search	Rejected areas of search
<b>Cherwell</b>	7900	<b>4400</b>	1850	1650
<b>Oxford</b>	4950	<b>550</b>	1850	2550
<b>South</b>	12100	<b>4950</b>	550	6600
<b>Vale</b>	9900	<b>2200</b>	1100	6600
<b>West</b>	7900	<b>2750</b>	-	5150
<b>Totals</b>	42750	<b>14850</b>	5350	22550



137) The working group recommends that the proposed apportionment for each District uses the shortlisted '*green*' areas of search. Thus the proposed apportionment is recommended as:-

	<b>Proposed apportionment</b>
<b>Cherwell</b>	<b>4400</b>
<b>Oxford</b>	<b>550</b>
<b>South</b>	<b>4950</b>
<b>Vale</b>	<b>2200</b>
<b>West</b>	<b>2750</b>
<b>Total</b>	<b>14850</b>

138) The Growth Board is requested to endorse this recommendation.

## **Section 9: Next steps and implementation timescales**

- 139) The Programme for considering the unmet need of Oxford is inextricably linked with the progress of the district Local Plans. Three councils, Cherwell, Vale and West have all had Part One of their Local Plan examinations completed, where the Inspector has considered the implications of the unmet need for Oxford in their Local Plans.
- 140) In the first two examinations, at Cherwell and Vale, the Inspector agreed to allow the Local Plans to proceed in advance of the conclusion of the Programme with an early review once the unmet need was apportioned. In the third examination at West Oxfordshire, the Inspector concluded that the Council should consider Oxford's unmet need in the current emerging Local Plan to prevent the Local Plan being out of date before it can be adopted. It is also therefore anticipated that the South Oxfordshire Local Plan, when examined will also need to have regard to the conclusions of the Programme.
- 141) The timely completion of the Programme for considering the unmet need of Oxford now has significant and pressing implications for both Cherwell and West's Local Plan Examinations. Cherwell have commenced a Partial Review of its Part One Local Plan, for which it has a two-year deadline following the adoption of the Part One Plan in July 2015. Cherwell intend to publish a draft Partial Review Development Plan Document in November 2016 and require to have fully considered how to meet their agreed proportion of Oxford's unmet need in this process to ensure that the planned Partial Review can be completed within the agreed timescale set out in Paragraph B95 of their Local Plan, Part One.
- 142) West Oxfordshire have been advised by their Inspector that in effect they should not proceed with their Local Plan until they can include proposals to meet any agreed apportionment of the unmet need for Oxford to their District. Therefore, the timetable for West Oxfordshire's Local Plan is now dependant on the completion of the Programme for considering the unmet need of Oxford before they can make further progress.
- 143) Oxford and its neighbouring Local Planning Authorities will now take forward the agreed apportionment figure into their own Local Plan development. While each Plan has reached a different stage there is a common commitment to applying the apportioned figure and accompanying evidence base to the preparation of each District Local Plan and continuing to work constructively under the Duty to Co-operate.
- 144) This work will involve detailed technical work at a site level and will provide extensive opportunities for public and stakeholder engagement. Each Local Planning Authority will receive the Programme evidence and will commission additional detailed evidence, and full Sustainability Appraisals to support their Local Plan Review and Local Plan developments. It will be for each Council to consider whether they adopt any of the areas of search assessed through the Strategic Work Programme or whether they develop an alternative approach, supported by their own evidence prepared in conjunction with local plan reviews.
- 145) One critical matter to recognise is that the assessment of the spatial options included recognition that deliverability of allocated sites was considered on a comparable basis

between the different Districts, with an assumed start date of 2021 for the commencement of development after the adoption of the respective Local Plan review or Local Plan update/refresh. This assumption does not preclude earlier delivery, but does recognise the complexity of the issues being considered and has sought to factor in reasonable lead times to enable options to come forward and to be fully considered through the Local Plan process.

- 146) The apportionment once agreed will then be taken forward as part of the consideration of the individual Local Plans. The current programme for each District is as follows.

### **Section 9.1: Cherwell District Council**

The council intends to consider its proposed submission Development Plan Document for a Partial Review of the Local Plan part 1 at the Executive meeting in November 2016 and this will take account of its share of the apportionment. Submission of the revised Plan will be June/ July 2017 in line with the timetable set by the Inspector and incorporated into the adopted Local Plan part 1 in Para B95.

### **Section 9.2: Oxford City Council**

Work commenced in January 2016 on Oxford's Local Plan which looks forward to the longer time period of 2036 and an issues consultation has recently concluded. This is to be followed by a Preferred Options consultation in June 2017 and a Proposed Submission version consultation in June 2018.

The Council aims to submit its preferred plan for examination in December 2018 with adoption anticipated during 2019. This is in line with the timeframe agreed at the Leaders meeting when the working assumption of Oxford unmet OAN was of 15,000 homes was agreed.

### **Section 9.3: South Oxfordshire District Council**

The council propose submission of its draft Local plan including its response to the apportionment in spring 2017 with Examination anticipated in the summer/autumn 2017

### **Section 9.4: Vale of White Horse District Council**

The Vale Local Plan 2031: Part 1 is currently at Examination following formal hearing sessions in September 2015 and February 2016.

The Inspector published his Interim Findings in June 2016 and stated that the plan was likely to be found sound subject to modification. The council anticipates that consultation on the 'main modifications' will take place later in July 2016 with adoption of the plan anticipated early in 2017.

Work has commenced on the Local Plan 2031: Part 2 and will address the proportion of Oxford's unmet to be addressed in Vale and it is anticipated that this plan will be submitted to the Secretary of State in February 2018.

### **Section 9.4: West Oxfordshire District Council**

Growth Board  
26 September 2016  
Agenda item Appendix One  
Post SHMA Strategic Work Programme – final report

The council intends to respond to the Inspectors preliminary findings with a package of suggested changes to the submission Local Plan in October 2016.

The Council proposes that the suggested changes will address its apportionment of Oxford's unmet need.

## Section 10: Conclusions and recommendation

- 148) As noted in section 3 of this report, the PPG advises that cooperation should take place to ‘...*maximise the effectiveness of Local...Plan preparation in the context of strategic cross boundary matters*’...and...‘...*co-operation should produce effective and deliverable policies on strategic cross boundary matters*’.
- 149) The guiding principle for the Project Team has been to ensure that the potential areas of search that underpin the proposed apportionment, identified in each district are reasonably representative of the potential capacity of each district to contribute to Oxford’s unmet housing needs by 2031. This enables us to show that the Duty to Cooperate is being discharged and the limited guidance in the PPG is being addressed with evidence to show how the process has led to the conclusions, without compromising the ability of each Council to test this through their respective Local Plan processes.
- 150) The Project Team believe that the evidence from the different work streams (Oxford capacity, Green Belt, Spatial Options, Transport, HRA and Education) has provided a basis for agreeing a proposed apportionment with sufficient detail to be justified, without compromising the subsequent Local Plan process.
- 151) The process began with the report to the Growth Board agreed in November 2014 which set out a set of commitments to joint working and reviewed the steps being undertaken to secure agreement to a final apportionment of the unmet need of Oxford. This report shows that the November 2014 objectives have been fulfilled and effective outcomes have been achieved in so far as a shared evidence base has been agreed, and an apportionment is signed up to subject to agreement by Growth Board. Duty to Cooperate is of course an on-going process up until the point that local plans are submitted, and so the next stages of joint working between the local authorities will also be important to ensure that the apportionment is taken forward and implemented with successful outcomes that ultimately ensure that homes are delivered to meet the identified unmet need of Oxford..
- 152) All the Councils in Oxfordshire have remained involved throughout the process and contributed to the consideration of all aspects of the programme and the consideration of the emerging evidence. The Planning Authorities of Oxfordshire have embarked on a process some have referred to as ‘evidence based Duty to Cooperate’.
- 153) The Duty to Cooperate has been actively fulfilled by all Councils and an apportionment is proposed for agreement by the Oxfordshire Growth Board.
- 154) **Recommendation.** The working group recommends that the proposed apportionment for each District uses the shortlisted ‘green’ areas of search. Thus the proposed apportionment is recommended as:-

	Proposed apportionment
Cherwell	4400
Oxford	550
South	4950
Vale	2200
West	2750

Growth Board  
26 September 2016  
Agenda item Appendix One  
Post SHMA Strategic Work Programme – final report

Total	14850
-------	-------

154) The Growth Board is requested to endorse this recommendation.

## **Appendix**

- Appendix 1 - Growth Board Terms of Reference.
- Appendix 2 – Meetings of the Growth Board considering the unmet need of Oxford
- Appendix 3 - Growth Board paper approving Post SHMA Strategic Work Programme as an approach to resolving Oxford unmet need: Nov 2014
- Appendix 4 - Post SHMA Strategic Work Programme Summary
- Appendix 5 – Detailed Assessment of Areas of Search

## **Appendix 1 - Growth Board Terms of Reference**

The agreed Terms of Reference for the Oxfordshire Growth Board are reproduced below:

### **Oxfordshire Growth Board Joint Statutory Committee**

#### **Terms of Reference**

##### **1.0 Governance**

- 1.1 The Oxfordshire Growth Board (the joint committee) includes the local authorities within the Oxfordshire LEP comprising, Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council, West Oxfordshire District Council and Oxfordshire County Council.
- 1.2 It will also include co-opted non-voting named members from those organisations listed at [4.4 below](#). In addition, when considering matters that sit under the purview of the Local Transport Board then Network Rail and the Highways Agency will have the right to attend the Growth Board as non-voting investment partners.
- 1.3 The Oxfordshire Economic Growth Board is a Joint Committee under s101 (5), 102 Local Government Act 1972 and s9EB Local Government Act 2000 and pursuant to the Local Authorities (Arrangement for the Discharge of Functions) (England) Regulations 2012.
- 1.4 The Committee will be hosted under local government arrangements and this will be rotated in accordance with the arrangements for the Chairman (see [Section 8.1](#)).

##### **2.0 Accountable Body**

- 2.1 The Accountable Body for the Growth Board is Oxfordshire County Council which will provide Section 151 and Monitoring Officer roles to the Committee.
- 2.2 The County Council's Chief Finance Officer (Section 151 Officer) in conjunction with the LEP Chief Executive will provide the Growth Board with a quarterly financial report. This report will provide the Board with an overview of the funds spent, funds committed against funds allocated
- 2.3 Programme management will be provided by the Growth Board Programme Manager and will include milestones and outcomes achieved and where necessary, ensure that action plans are put in place to address any concerns.
- 2.4 For those programmes and funding streams where another local authority is the Accountable Body, e.g. the Enterprise Zone, the relevant Section 151 Officer will provide the financial and programme performance information to the County Council's Chief Finance Officer to enable a complete picture to be presented to the Growth Board.
- 2.5 The Local Transport Board Assurance Framework will be the basis on which the appraisal, assessment and prioritisation for proposed Local Growth Fund projects and future growth programmes will be undertaken, which may be revised by the Growth Board as wished, subject to approval by the DfT.

##### **3.0 Purpose of the Oxfordshire Growth Board**

- 3.1 To facilitate and enable collaboration between local authorities on economic development, strategic planning and growth.
- 3.2 To deliver cross-boundary programmes of work including City Deal, Growth Deal, Strategic Economic Plan and Local Transport Board programmes, within government

timescales, including agreeing the detailed contents of specific priorities, plans, projects and programmes.

- 3.3 To approve and monitor the implementation of a detailed work programme as laid out in the City Deal, Strategic Economic Plan and Local Transport Board programmes together with any future Growth Deals or other programmes as agreed.
- 3.4 To bid for the allocation of resources to support the above purposes. For the avoidance of doubt these terms of reference are not to be read as incorporating any non-Executive functions and each constituent Authority shall retain the capability to exercise all executive functions generally and specifically in relation to economic development, strategic spatial planning and strategic transport planning. Further, these terms of reference are not to be read as entitling the Board to bind, either financially or contractually, any constituent Authority.”

#### 4.0 **Membership**

- 4.1 As the Joint Committee is discharging executive functions then the appointed person must be from the Executive. There should be one member from each constituent authority.
- 4.2 Each constituent authority shall appoint a substitute (also being an executive member). The substitute member shall have the same rights of speaking and voting at the meetings as the member for whom the substitution is made.
- 4.3 Subject to the legal right of the Joint Committee to appoint a Chairman and Vice Chairman of its choice each year the proposed protocol is that there will be a rotating Chairman and Vice Chairman as set out in table [8.2 below](#).
- 4.4 Other non-voting members as required for good linkages with the Local Enterprise Partnership shall be a single named-position representative from the bodies as detailed below:
- Chairman of OXLEP
  - Vice Chairman of OxLEP and Skills Board Representative
  - Universities Representative
  - OXLEP Business Representative- Bicester
  - OXLEP Business Representative-Oxford City
  - OXLEP Business Representative- Science Vale
  - Homes and Communities Agency Representative
- 4.5 When considering matters that sit under the purview of the Local Transport Board then a single representative of Network Rail and the Highways Agency will have the right to attend the Growth Board as non-voting investment partners

#### 5.0 **Voting**

- 5.1 One member one vote for each constituent authority member although members intend to agree matters on a unanimous basis where possible.
- 5.2 Normal rules as to declarations of interest to be applied to local authority members in accordance with the respective Council’s Code of Conduct.

#### 6.0 **Quorum & Safeguard**

- 6.1 The quorum for a meeting shall be four voting members.
- 6.2 Where the effect of a particular proposition, if adopted by the Committee, would be to give rise to contractual or financial implications for any constituent authority, then a



protocol will be established where the expectation would be that the vote of the member appointed by that constituent authority, in favour of the proposition, would be required. In respect of other matters, all other voting will be on a normal majority basis.

- 6.3 When considering matters that sit under the purview of the Local Transport Board, this protocol will apply to the vote of the member appointed by the County Council.

## **7.0 Functions**

- 7.1.1 The opportunity provided by establishing the Growth Board and aligning the strategic meetings including SPIP and the LTB is to streamline the governance arrangements and incorporate the combined terms of reference under a single governing body:

### From the Spatial Planning & Infrastructure Partnership

- To provide a forum for partnership working and collaboration on spatial planning, economic development, housing, transport, and general infrastructure issues arising at regional and sub-regional level;
- To lead and co-ordinate liaison with the Local Enterprise Partnership on Oxfordshire wide issues and support the LEP in the identification of priorities and development of investment strategies and economic plans for Oxfordshire;
- To lead and co-ordinate liaison with the Homes and Communities Agency (HCA) to develop plans to enhance Oxfordshire share of HCA development programmes and contribute to any related interaction with Government agencies;
- To lead on production of joint work on cross border issues to ensure partners meet the requirements of the Duty to Cooperate and wider national policy;
- To lead and coordinate the Homes and Communities Agency (HCA) process on regeneration and housing issues leading to the production of the Local Investment Plan (LIP) and contribute to any related interaction with Government agencies;
- To seek agreement on local priorities and targets and advise partners on matters of collective interest in the fields of activity listed above;
- To seek agreement on alignment between national and regional and local funding streams in the fields of activity listed above and prioritise competitive funding bids;
- To assess whether spatial planning, infrastructure and public services are integrated and make recommendations to encourage this.

### From the Local Transport Board

- To have the role of prioritising transport schemes to be funded from devolved funding sources, not already within the remit of the Local Transport Authority, to ensure that decisions are made in one place and supported by all relevant partners and stakeholders;
- To have the ability to comment on wider consultations, such as the Local Transport Plan, and funding investment decisions from national agencies, e.g. Network Rail, Highways Agency, where these have a strategic impact on the local transport network;

### From the City Deal and Growth Board

- To oversee the delivery of all of the local government aspects of City Deal, Growth Deal (where local authorities are the delivery partners) and to have oversight of the LEP Work Programme;
- Prioritisation of the investment in the Escalator Hubs, the allocation of funding from City Deal and the accountable body for each project;
- Establishing the City and relevant Growth Deal projects infrastructure programme and agreement of the contribution level from either retained business rates or the proposed funding streams;
- Responsible for prioritising the delivery of schemes to be funded through the City Deal infrastructure fund, for transport, housing or economic development schemes;
- Agreement to the work programme for the City Deal, relevant Growth Deal projects and in support of the Strategic Economic Plan.

## 8.0 Meetings

- 8.1 The Chairman and Vice-Chairman of the Growth Board will be elected at the first meeting but are expected to follow the arrangements as set out in paragraph 8.2.
- 8.2 The lead authority for convening meetings will be that of the elected Chairman and it will provide Secretary/Clerk support to the Board. Meetings shall be held on a bi-monthly basis, meetings may be called as and when required to ensure that critical timescales are met.

Year	Chairman	Vice chairman
2014/15	West Oxfordshire District Council	Cherwell District Council
2015/16	Cherwell District Council	Oxfordshire County Council
2016/17	Oxfordshire County Council	Oxford City Council
2017/18	Oxford City Council	South Oxfordshire District Council
2018/19	South Oxfordshire District Council	Vale of White Horse District Council
2019/20	Vale of White Horse DC	West Oxfordshire DC

## 9.0 Secretariat and Support

- 9.1 The secretariat and support will be provided by the existing SPIP Executive Officer Group, now known as the Growth Board Executive. Other investment partners will be involved as appropriate, e.g. Homes and Communities Agency, Environment Agency, Highways Agency, Network Rail; to advise on the investment and work programme.
- 9.2 The Group will be chaired by the lead authority (as in previous SPIP arrangements). In the first instance this will be West Oxfordshire.

## 10.0 Scrutiny Arrangements

- 10.1 Decisions made by the Committee shall be subject to the scrutiny arrangements of each constituent authority.

Growth Board  
26 September 2016  
Agenda item Appendix One  
Post SHMA Strategic Work Programme – final report

## **Annex**

### **Protocol**

This protocol has been incorporated into the Terms of Reference for Oxfordshire Growth Board, a statutory Joint Committee.

The Parties to this Protocol are those referred to in the Terms of Reference.

The Parties wish to record the basis on which they propose to undertake their decision making function as a Joint Committee.

### **General principles**

The Parties agree to support the purposes of the Joint Committee by ensuring that in their decision making, they:

- Collaborate and cooperate with each other
- Are open and accountable to each other
- Adhere to all relevant statutory requirements
- Deploy appropriate resources
- Act in good faith

### **Voting arrangements**

1. Only Joint Committee Members (or their substitutes) shall be designated as Voting Members and shall be entitled to one vote on items of business considered by the Joint Committee.
2. Every question shall be determined by the voices of those Voting Members present, provided that if there is a Voting Member who indicates dissent to this procedure than a vote by show of hands shall take place. A simple majority shall be required.
3. In the event there being an equal number of votes for and against a particular proposition, the Chairman shall have a casting vote.
4. Where the effect of the particular proposition, if adopted by the Joint Committee, would be to give rise to contractual or financial implications for any part of one of the Parties, then in addition to the normal requirement for a simple majority of votes, the Parties will seek to ensure that the vote of the Member of the effected Party, in favour of the proposition, will be obtained.

### **Status**

This protocol is not intended to be legally binding, and no legal obligations or rights shall arise between the Parties from this protocol.

**Appendix 2 – Meetings of the Growth Board considering the unmet need of Oxford.**

A Project Team was established involving officers from each Council that has met fortnightly through the Programme reporting back firstly to the Growth Board Executive Officer Group and thence onto the Board at regular intervals on progress with the Programme. In addition a number of Check and Challenge workshops have been held at the conclusion of key projects within the Programme to review the detail of the evidence and its implications.

List of Growth Board meetings at which the Programme was considered.

20<sup>th</sup> November 2014

25<sup>th</sup> June 2015

30<sup>th</sup> July 2015

19<sup>th</sup> November 2015

2<sup>nd</sup> February 2016

31<sup>st</sup> March 2016

29<sup>th</sup> May 2016

26<sup>th</sup> September 2016

### **Appendix 3 - Growth Board paper approving Post SHMA Strategic Work Programme as an approach to resolving Oxford unmet need: Nov 2014**

#### **Title: Post SHMA Strategic Work Programme**

#### **Purpose of Report**

1. To outline a strategic work programme that can address the unmet need arising from the Oxfordshire Strategic Housing Market Assessment (SHMA), and help local planning authorities meet the duty to cooperate, whilst protecting the sovereignty of individual Councils over their Local Plans.

#### **Recommendations**

2. That the Growth Board endorses the principles set out in the proposed strategic work programme.
3. That the Growth Board asks each member council to identify the necessary resources for this collaborative work.
4. That a report from the Growth Board Executive Officer Group is presented to the next Growth Board outlining the project plan and resourcing arrangements for the strategic work programme.

#### **Background**

5. The Oxfordshire SHMA was published in April 2014. This suggests that across Oxfordshire, there is an identified need for provision of around 5,000 homes a year over the 2011-31 periods. The need in Oxford City was identified as between 1,200 and 1,600 homes a year, a potential requirement of around 28,000 additional homes up to 2031. Although the precise ability of Oxford to accommodate its own need has yet to be concluded there is general agreement that there is limited capacity within the city to accommodate this number of dwellings and therefore there will be a significant potential shortfall which will need to be provided in neighbouring districts.
6. In March 2014, the Spatial Planning and Infrastructure Partnership (SPIP) agreed a headline process, as part of the Statement of Cooperation, setting out how to address the outputs of the SHMA in relation to unmet housing need. Because this was relatively new ground for Oxfordshire, SPIP sought advice from two independent "critical friends". The advice concluded that a collaborative process is required to understand the strategic options, in the context of both the Strategic Economic Plan, and of existing and planned infrastructure.
7. Council leaders have considered the emerging ideas for the strategic work programme and agreed some key principles that should underpin future post SHMA work. These are summarised as:

- The district Local Plans are sovereign and all work should feed into Local Plans for them to determine the spatial future of the districts;
  - A recognition however that the work must be collaborative and joined up to provide a county wide spatial picture and strategy;
  - A recognition therefore that joint work on future spatial options, transport infrastructure and green belt will be required to feed into Local Plans;
  - Recognition that the City cannot fully meet its housing needs and there is a need to agree on the level of unmet need. However work on determining spatial options in Local Plans can commence alongside this;
  - A wish that the timescale for completing the Review is 12-18 months and that this should not hold up Local Plan timescales.
8. Using these principles as a basis and following further discussions at the EOG, officers have drawn upon the attached Strategic Work Programme for consideration by the Growth Board.
9. The key messages from the programme are:
- The need to coordinate an agreed timetable for Local Plan reviews for the rural districts that build a collective spatial vision through the individual reviews;
  - The need to recognise the economic geography of the county and strategic infrastructure implications of growth;
  - The need to agree how to distribute the unmet need for Oxford City to enable districts to consider this need through their Local Plan reviews;
  - The constituent parts of the work programme necessary to meet the duty to cooperate;
  - The timetable together with an initial assessment of resource implications;
  - The respective roles of the partner agencies.

## **Conclusion**

10. Officers believe that the attached proposal offers a methodology that appropriately balances the need for collaborative working, required by the Duty to Cooperate, and for county wide strategic infrastructure planning with the statutory role of Local Plans.
11. The proposed work programme plans to complete the project within 12-18 months. However, the lead authority's view is that whilst this is achievable there are significant risks inherent in the approach that could lead to delay and these will need to be recognised and mitigated in a formal project plan.

**Appendix 4 - Post SHMA Strategic Work Programme Summary**

No.	Programme Element	Lead Council(s)	Resources	Tasks	Outputs	Original Completion Date	Revised completion date as at 12th May 2016	Notes
1	<b>Programme Set Up</b>	WODC- Cherwell from 1/7/15	Growth Board Programme Manager/ In-house staff	Prepare Detailed Project Plan, agree project leads, identify resources, and define steering and reporting arrangements	Detailed Project Plan for approval at February Growth Board	On going		Completed.
			Growth Board Programme Manager/ In-house staff	Recruit/Identify Strategic Planner to support the Growth Board Programme Manager	Fixed term/ seconded Strategic Planner	February 2015	May 2015	Completed.
			Growth Board Programme Manager/ In-house staff	Engage external expert Critical Friend to independently validate and comment on the programme at key stages	Critical Friend appointed	February 2015	May 2015	Completed.
			Growth Board Programme Manager/ In-house staff	Develop communications strategy and Growth Board website	Communication Strategy and Website Information	February 2015	February 2015	Completed.
			Growth Board Programme Manager/ In-house staff	Develop coordination and communication protocol	agreed coordination and communication protocol	May 2015	August 2015	Completed.
			Growth Board Programme Manager/ In-house staff	Develop a confidentiality protocol		n/a	October 2015	Completed.
2	<b>Define Oxford's Unmet Need</b>	OCityC	In-house staff/ Consultants	Detailed response from VOWH, SO and CDC on Oxford SHLAA (Cundall Review)	Cundall Report	November 2014		Completed.
			Critical Friend	Critical Friend reviews Oxfords SHLAA and responses from rural districts and recommends an unmet need figure for Oxford based upon existing policy, with policy change options to be considered as a Strategic Option(s) and tested	Critical Friend Review Paper	February 2015	October 2015	Completed.
3	<b>Strategic Options development to inform housing</b>	WODC	Post SHMA project Team	Define scope of Strategic Options (i.e. size thresholds and essential criteria) and prepare standard information template (SHLAA compatible)	Scoping Paper and Standard Information Template	January 2015	March 2015	Completed.



	<b>distribution</b>	All Councils	all partners	Individual Districts generate aggregated Strategic Options	Strategic Options for all districts	March 2015	September 2015	Completed.
		All Councils	Post SHMA project Team/EOG	Check and Challenge workshop on Strategic Options list to ensure that all reasonable options have been included	Final Strategic Options list	March 2015	October 2015	Completed.
4	<b>High Level Sustainability and Strategic Options Assessment</b>	OCountyC	Post SHMA project Team	Finalise brief and procure consultants for Sustainability Assessment	Develop Project Brief and appoint consultants	February 2015	November 2015	Completed.
		OCountyC	Post SHMA project Team	Study the draft report and assess the relative contribution of areas of land to the purposes of the Oxford Green Belt in order to identify the potential, or not, for development, and the case for additional areas to be added to the Green Belt.	Draft Report on Green Belt Study	June 2015	April 2016	Completed as part of spatial options testing framework
		OCountyC	Post SHMA project Team/Consultants	Establish spatial and sustainability assessment criteria and baseline	Agreed assessment criteria and baseline	June 2015	April 2016	completed and testing criteria agreed - this methodology will underpin the recommendations of the draft spatial options assessment report due on 11th May
				Identify any strategic environmental constraints	Report on Strategic Environmental Constraints	June 2015	April 2016	
				Identify any strategic infrastructure constraints	Report on Strategic Infrastructure Constraints	June 2015	April 2016	
				Identify any strategic water constraints	Report on Strategic Water Constraints	June 2015	April 2016	
				Assess Strategic Options for consistency with Strategic Economic Plan	SEP Consistency Paper	June 2015	April 2016	
				Infrastructure assessment of Strategic Options, including transport	Infrastructure analysis of Strategic Options	June 2016	April 2016	
				Assess landscape and heritage impact of Strategic Options	Landscape and heritage analysis of Strategic Options	June 2017	April 2016	
		OCountyC	Growth Board Project Team/ EOG/ Consultants	Check and Challenge workshop on emerging evaluation of Strategic Options	Revised Draft Sustainability Assessment Report and Revised Draft Report on Green Belt Study	July 2017	April 2016	Completed
5	<b>Infrastructure Delivery Plan</b>	OCountyC	Growth Board Project Team	Collate existing IDPs and evidence	develop a background comprehensive evidence	March 2015	January 2016	Completed.

					base			
				Define scope of infrastructure assessment work and transport assessment/ modelling	Detailed Project Brief	March 2015	January 2016	Completed.
				Initial assessment of transport/accessibility of options	initial options report for spatial options workshop	July 2015	April 2016	Completed on the long list of options.
				Consideration of a more detailed assessment of options and infrastructure needs/ requirements of the shortlisted options.	first draft of infrastructure report		June 2016	Completed- The Project Team have concluded that further more detailed work was not required for the apportionment but would be needed for areas to be brought forward. At present the team are considering a more limited but detailed examination of key transport corridors such as A40 and A44
			Growth Board Project Team	Finalise Strategic Infrastructure Delivery Plan	Final Strategic Infrastructure Delivery Plan	tbc	July 2016	Completed- The conclusions necessary for the apportionment have been received
6	<b>Complete final reports for Growth Board</b>	All Councils	Growth Board Project Team	Report on final conclusions on spatial options assessment and infrastructure implications and recommendations on housing distribution between districts and implications for 5 year housing land supply	Report to Growth Board	July 2015	August 2016	drafting has commenced
			Growth Board	Growth Board consider recommendations and decide housing distribution between districts	Agreed position on housing distribution	September 2015	Early-mid September 2016	Growth Board date set for 26th September 2016
			Growth Board Project Team	Publish memorandum of understanding and supporting project documentation	Revised Statement of Cooperation	September 2015	End of September 2016	September/early October 2016
7	<b>Strategic Habitat Regulations Assessment</b>	Cherwell	Growth Board Project Team	Prepare brief and procure consultants	Project Brief	tbc	tbc	The Team are considering whether a high level HRA is appropriate for the Programme. Notwithstanding their conclusions, a detailed HRA project will commence alongside Local Plan reviews
			Consultants	Screening of Recommended Strategic Options	HRA Screening of Strategic Options Report	tbc	tbc	
				Appropriate Assessment (if required)	Appropriate Assessment	tbc	tbc	
	<b>Water Cycle Strategy</b>	Vale/South	Growth Board Project Team	Prepare brief and procure consultants	Project Brief	tbc	tbc	This project will commence alongside Local Plan reviews
			Consultants	Prepare Water Cycle Strategy	Water Cycle Strategy	tbc	tbc	

**Appendix 5 – Detailed Assessment of Areas of Search**

	District	Name	Site yield to 2031	RAG	Explanation
	Cherwell	Shipton-on-Cherwell Quarry	1100	R	The area's score reflects its proximity to Oxford and the fact that this is not mitigated by transport accessibility. Additionally, deliverability before 2031 with minerals extraction on-going is considered to be challenging.
	Cherwell	Land North of Oxford	2200	G	The area of search scores well against the key criteria in the spatial options assessment. It is also sustainable from a transport perspective.
	Cherwell	Land at Woodstock	1300	A	<p>The area of search scored amber for the following reasons:</p> <p>The spatial options assessment noted some landscape/heritage issues as the area is nearby to a world heritage site. However, despite this the area is not in the green belt.</p> <p>The area of search scores poorly for transport links, based upon it being relatively remote from Oxford, apart from current rapid transit routes and proposals from Oxford, which means it has relatively poor connectivity compared to other areas of comparable scoring. The Team noted that a park and ride is under consideration at the edge of the Airport site and on Langford Lane, but this has not reached planning stage.</p> <p>Finally it was noted that there could be a cumulative impact of this area of search being developed alongside the Begbroke/ Yarnton /North Oxford areas of search and in the unlikely event that all are developed, there would be issues of deliverability and infrastructure capacity to address.</p>
	Cherwell	Land at Begbroke	1650	G	The area of search scores well against the key criteria.
	Cherwell	East of Yarnton	550	A	The area scored amber against the assessment criteria with 2 of the 9 criteria scoring as red.

	Cherwell	West of Yarnton	550	R	The area of search scores the same as the area east of Yarnton but also scored poorly on transport connectivity, landscape and relationship to countryside. There are also settlement pattern concerns. As a consequence this area scores red.
	Cherwell	South East of Kidlington	550	G	Although the area of search scores well against the key criteria it was noted that areas 2 and 7 could not both be pursued without unwelcome coalescence arising and as the Green Belt study noted, loss of openness with Kidlington.
	Oxford	Oxford enhanced growth option	2000	N/A	Area of search removed as double counting what has been included in the Oxford City SHLAA.
	Oxford	Oxford Golf Club	1100	A	<p>The area of search scores well for close proximity to Oxford, sustainable transport, and connectivity to employment centres. However, within the area there are issues of ecological importance concerning biodiversity and also the impact of water flows into an adjacent area of special scientific interest. The Team noted that these issues required balancing in the scoring.</p> <p>There was not agreement within the Project Team on the score for this area. The Rural districts consider that it could be judged to be green if considered on a consistent basis with other areas of search. Oxford believes that it is not possible to mitigate the hydrology concerns that development would cause.</p> <p>The Team agreed that there has to be a test against whether it is a realistic proposition. If the biodiversity issues are “show- stoppers” then it should remain as amber.</p>
	Oxford	Horspath site	550	R	The area was scored red for two reasons. Firstly, the area has significant transport issues identified. Secondly, the area is judged not to be deliverable as alternative non-residential use is at an advanced planning stage- i.e. BMW expansion on to this area is imminent.
	Oxford	Land north of	550	G	The area was scored green on the basis of its close proximity, its performance against the

		Old Headington			<p>key criteria in the options assessment and relatively sustainable transport options.</p> <p>The Project Team noted the Inspector’s report at Barton AAP that rejected this site, primarily on the basis of impact on Heritage/Conservation Area but concluded on a majority basis that the area should score green as it scores well against the key criteria and is not meant as a site allocation but as a basis for apportionment.</p>
	Oxford	Oxford Science Park at Littlemore	350	A	<p>These are two areas that have already been allocated for employment and are actively being considered for strategic business expansion. The group noted there is advanced pre-application process on certain areas for specialist/headquarters style employment uses.</p> <p>Additional issue of whether the locations are suitable for housing having regard to their location in relation to existing employment use and main roads.</p> <p>The Project Team concluded that although these are recognised employment areas they are appropriate area of search available for development where housing rather employment could be a different decision. This is an issue of planning choice rather than site characteristic and on this basis; choice should not be a determinant. However where there is a development process for an existing use well underway within the area of search it does not seem realistic to ignore that.</p> <p>In summary the team concluded that the areas of search have elements that indicate they should be shortlisted, for example proximity to the City, connectivity to employment etc. but this is balanced by planning realism and issues about the deliverability of the education provision the areas would require. The team decided that this balance led to a score of amber.</p>
	Oxford	Oxford Business Park	400	A	<p>This area of search was rejected on the basis of its poor performance against assessment criteria.</p> <p>The area was not viewed as sustainable given its distance from the city, consequent reliance upon car travel and the inability to fund necessary road improvements to mitigate this.</p>
	South	Land at Berinsfield	2200	R	<p>This area of search was rejected on the basis of its poor performance against assessment criteria.</p> <p>The area was not viewed as sustainable given its distance from the city, consequent reliance upon car travel and the inability to fund necessary road improvements to mitigate this.</p>

	South	Land at Culham	2200	R	The area scores amber for most of the criteria in the options assessment, however it scored poorly against the transport assessment which noted that all solutions to the transport issues created by development have high funding gaps and cannot realistically be assumed to be able to come forward. The area also does not score well on accessibility to jobs in Oxford, especially the Eastern Arc area. On this basis, the area was scored red.
	South	Land south east of Grenoble Rd	2200	G	The area of search scores well against the key criteria. In transport terms it was concluded that the area of search was relatively sustainable as it is well serviced by strategic bus and cycle routes nearby.
	South	Land at Wheatley - Holton	550	A	The site is categorised as amber. It has a balance of criteria, scoring well on accessibility to existing provision but poorly when compared to future proposals (this relates to the decision of Brookes to relocate). This was also supported by the reliance upon car journeys to the City for visiting and employment, making it a relatively unsustainable development from a transport perspective.
	South	Land adjacent to M40 Junction 7	2200	R	The area was rejected on the basis of poor performance against assessment criteria and a lack of sustainable transport options for the development.
	South	Land at Wick Farm	2200	G	The area of search scores well against the key criteria in the options assessment due firstly to its close proximity to Oxford and availability of sustainable transport options both to the centre and key employment sites in East Oxford.
	South	Land adjacent to Thornhill P&R	550	G	The area of search scores well against the key criteria in the options assessment due firstly to its close proximity to Oxford and availability of sustainable transport options both to the centre and key employment sites in East Oxford.
	Vale	Land Abingdon North	1100	G	Although the area is slightly remote from Oxford it scores well for future sustainable connectivity to key employment centres.
	Vale	Land at Abingdon South	1100	R	The area was rejected on the basis of poor performance against both the options assessment criteria and the necessary highway infrastructure required to deliver.
	Vale	Land	N/A	N/A	The area was removed from assessment prior to commencement. Thames Water confirmed

		earmarked as Garden Town or Reservoir			during the Vale Local Plan Examination that the area is likely to be required for a reservoir and should not be considered for housing.
	Vale	Land at Botley	550	G	The team noted the proposal to build a Park and Ride in the area (a County commitment, but not yet in the planning process). The Project Team concluded that the areas proposed use was not well advanced in planning terms and so it was legitimate to look at alternative uses- and re-categorise as green on the basis that the area of search scores well against the key criteria of proximity to the City and sustainable transport options.
	Vale	Land at Chawley	550	A	Although the area of search scored similar to Botley in transport terms it has a number of area specific and adjacent biodiversity issues raised in the options assessment. There is also an access issue.  The Team noted that the area could possibly contain a smaller scale of development but for purposes of the apportionment, the Team agreed to score as amber.
	Vale	Land at Cumnor	550	G	The area scored strongly against the options assessment but has a lack of current sustainable transport options. The team concluded on balance a score of green was appropriate.
	Vale	Land at Kennington	550	A	The key issue flagged in the assessments that made this area of search amber was accessibility/connectivity. However, there is also an additional concern about education provision for this scale of growth.
	Vale	Land at Kingston Bagpuize	1100	R	The area of search was rejected on poor performance against assessment criteria, mainly due to its distance from the City and lack of current or proposed sustainable transport options.
	Vale	Land at Radley	2200	R	This area was rejected on the basis of relatively poor connectivity to major employment sites in East Oxford and a lack of sustainable alternatives.

	Vale	Land at Wootton	1100	R	This area was rejected on the basis of poor performance against spatial options assessment criteria (5 red out of 9) and particularly poor transport scoring where nearly all journeys could only be supported by car and improvements to the road infrastructure could not mitigate the impact.
	Vale	Land at Appleford	1100	R	This area was rejected on the basis of poor performance against the spatial options assessment criteria with no green scores.
	West	Land north east of Witney	1300	R	This area was rejected on the basis poor performance against the spatial options assessment criteria and transport assessment due to the distance from Oxford and lack of either existing or proposed sustainable connectivity.
	West	Land west of Downs Road	550	R	This area was rejected on the basis of poor performance against the spatial options assessment criteria and transport assessment due to the distance from Oxford and lack of either existing or proposed sustainable connectivity.
	West	Land South of Witney	1100	R	This area was rejected on the basis poor performance against the spatial options assessment criteria and transport assessment due to the distance from Oxford and lack of either existing or proposed sustainable connectivity.
	West	Land north of Eynsham	2200	G	The area of search scores well against the key criteria in the options assessment with all criteria scoring green. It performs less well against the transport assessment as existing but better against proposed sustainable transport proposals which led the Team to conclude that the area should score green.
	West	Land west of Eynsham	550	G	The area of search scores well against the key criteria in the options assessment, with all but one criteria scoring green. It performs less well against the transport assessment as existing but better against proposed sustainable transport proposals that led the Team to conclude that the area should score green.
	West	Land within Eynsham Park	2200	R	Although this area of search is adjacent to other areas considered the score for this was different. Partly because of its proximity to parkland and partly because of a significantly



Growth Board  
 26 September 2016  
 Agenda item Appendix One  
 Post SHMA Strategic Work Programme – final report

	near Barnard Gate			poorer score for transport accessibility when compared to the other sites in Eynsham. The Team is also aware of the background issue of capacity if all three sites were to be brought forward. For these reasons a majority decision to score as red.
	Total considered	42750		

Growth Board  
26 September 2016  
Agenda item Appendix One  
Post SHMA Strategic Work Programme – final report