

The South East Plan
South Hampshire Sub-regional Strategy

Phase 2 Advice

*Partnership for Urban South Hampshire
(PUSH)*

June 2005

Foreword

The brief issued by the South East England Regional Assembly commissions Hampshire County Council, Portsmouth City Council and Southampton City Council to provide this Advice to the Regional Assembly. These three authorities have decided to undertake the work through the aegis of the Partnership for Urban South Hampshire (PUSH) which includes all eleven councils which comprise the strategy area: East Hampshire District Council, Eastleigh Borough Council, Fareham Borough Council, Gosport Borough Council, Hampshire County Council, Havant Borough Council, New Forest District Council, Portsmouth City Council, Southampton City Council, Test Valley Borough Council and Winchester City Council.

In November 2004, PUSH submitted a report to the South East England Regional Assembly which set out a sub-regional strategy for South Hampshire. PUSH cautioned that the unreasonably short timescale set by the Assembly for undertaking the work, meant that some of the information and data needed further verification, and that its proposals needed further elaboration, testing and refinement.

Over the subsequent months, further technical work has been undertaken which has enabled PUSH to refine its proposals further, whilst maintaining the overall vision of achieving higher economic growth. PUSH remains resolute that all its development proposals are conditional upon adequate and timely investment in transport and other infrastructure.

PUSH will continue to refine its approach over the coming months, in parallel with the formulation of District-level housing policy figures. Further refinements to the overall sub-regional strategy will be submitted to the Assembly in December 2005, in tandem with the District-level housing figures.

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1. Introduction

1.1 This advice covers the outstanding elements requested by the Regional Assembly in the Brief issued in April 2005 namely:-

i) Affordable Housing

The scale and types of affordable housing required in the sub-region based on local evidence including an indication of the proportion of the total provision that should be for social rented accommodation and other forms of affordable housing.

ii) Employment

a) A critical examination of the employment forecasts prepared for the Assembly by Experian Business Strategies and initial advice on employment growth.

b) Strategic criteria for the provision of employment land and floorspace building on the draft region-wide policy RE4.

iii) Policy Development

Amendments required to sub-regional policies in the light of the draft sustainability appraisal from ERM, ongoing technical work and comments received during the consultation period.

iv) Options and spatial preferences

The Brief also requires all Sub-regions to have completed work on options and advised Assembly of initial spatial preferences for distributing growth in the sub-regions.

1.2 This submission has been approved by the Leaders of all eleven PUSH authorities.

2. Affordable Housing

- 2.1 DTZ Piedad Consulting was commissioned by PUSH to produce a South Hampshire Housing Market Assessment. This was completed in April 2005 and provides a robust evidence base for the consideration of affordable housing requirements in the sub region.
- 2.2 The headline finding of the study is that South Hampshire needs as much affordable housing as it can realistically secure across all sites, without damaging the overall output of new homes.
- 2.3 The study confirms that the sub region has an existing backlog of 5,000 affordable homes. Whilst 700 new affordable homes have been built every year, that supply has been cancelled out by the loss of affordable housing stock through the “right to buy”; a massive shift in supply is therefore needed just to get back to a balanced housing market. The expectation that the existing backlog should be met in 5 years would mean building 1000 affordable homes per annum.
- 2.4 As with many parts of the country, house prices in South Hampshire have more than doubled since 1999. However, in South Hampshire earnings have not increased at anything like the same rate, so in real terms there has been a 60% decline in affordability. The DTZ research also shows that the numbers of low-income households will continue to increase under all growth scenarios. As a consequence, when the population increases both naturally and through migration, less of the population will be able to achieve the £33,000 p.a. income now needed to secure a mortgage on a typical low cost market home, therefore increasing housing need.
- 2.5 With current levels of affordable housing funding and at current levels of housing development there is insufficient provision to even clear the current backlog let alone meet the newly arising requirements. Unless there is major change in affordable housing supply, the backlog will continue to increase.
- 2.6 The options for making a significant impact on the affordable housing situation are relatively limited within the existing system where central funding is restricted and the amount of affordable homes coming forward is so directly linked to the development of market housing through Section 106 agreements.
- 2.7 The DTZ study considers that there is scope for seeking an average 30% - 40% target of affordable housing on new development sites. They recognise that there are many variables that will affect a site’s ability to provide affordable housing within this range and recommends that a coherent policy framework be developed in the sub region to both explore the variables and establish the 30-40% target with landowners and developers.

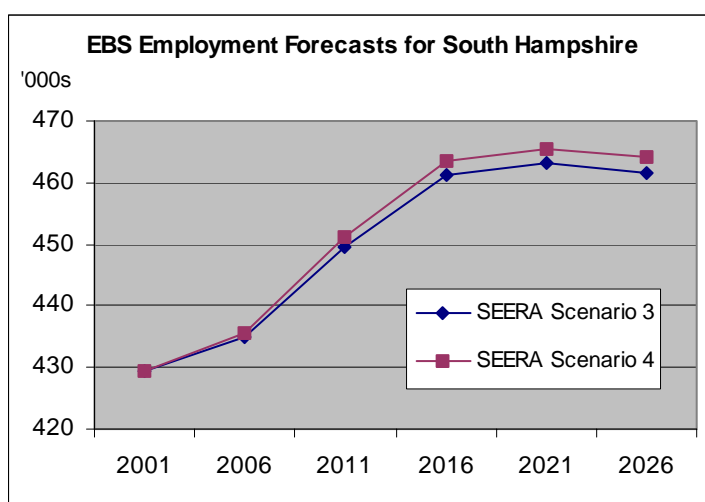
- 2.8 In terms of the different types of affordable housing that the market could sustain DTZ suggest that around 40% of those in housing need might be able to afford intermediate housing. However, the potential households currently have little understanding of these intermediate housing products. Work is needed to establish a public perception that such forms of ownership are a good investment.
- 2.9 On this basis, DTZ consider it would be desirable that at least 35% of affordable housing output takes the form of intermediate housing market products. Therefore the remaining 65% should ideally take the form of social rented housing. The actual proportions that will be applied on individual sites will currently be largely dependent upon funding arrangements.
- 2.10 The preparation of for a coherent sub-regional policy framework will provide a sound and detailed basis on which the individual local authorities can provide affordable housing. The policy framework will set out the range of affordable housing proportions that will be sought to meet the varying circumstances found throughout the sub region and the site size thresholds above which the affordable housing policy will apply. The framework will introduce the consistency which is currently lacking in the application of affordable housing policy and therefore make a sub-regional impact on securing as much affordable housing as possible, without damaging the overall output of new homes.
- 2.11 The approach set out above is reflected in the changes proposed to the South Hampshire affordable housing policy SH12 set out in Section 5.

3. Employment

- 3.1 The Regional Assembly commissioned economic forecasts from Experian Business Strategies to assist in the development of sub-regional strategies. The forecasts were to be treated as a base range of provision to be taken into account alongside a range of other factors. SEERA made it clear that it was for individual sub-regions to determine the growth options and preferences that were appropriate for their own areas, in the light of key issues identified in the sub-regional briefs.

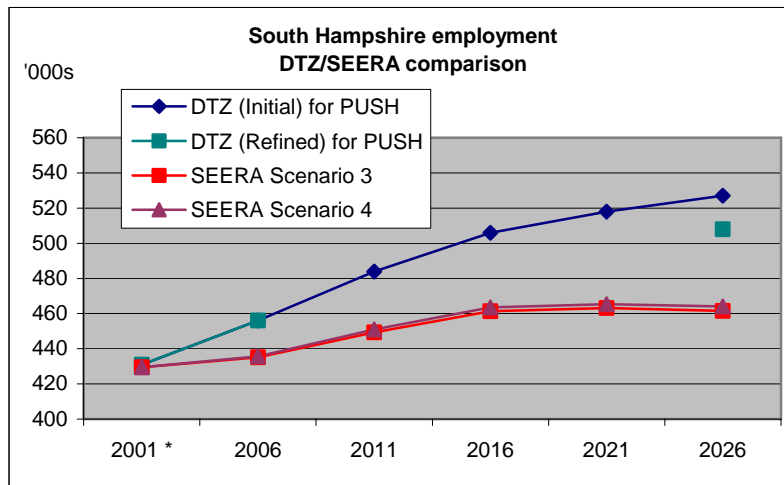
Economic Forecasts

- 3.2 The Experian Business Strategies (EBS) employment forecasts for South Hampshire are shown below.



- 3.3 The trajectory of these EBS forecasts appeared to be wholly inconsistent with the SEERA brief for South Hampshire which required that development options should test the effects of economic growth between 3% and 4% per annum. Accordingly the PUSH authorities decided to commission independent economic forecasts, following competitive tender, from DTZ Pidea.
- 3.4.1 The DTZ South Hampshire commission consisted of three elements:
- Evaluate the sub-region's economic drivers and business needs
 - Identify the means of achieving economic growth and key performance indicators
 - Test the implications of a range of growth scenarios from 3% to 4% per annum in terms of capacity and capability, in particular the implications for labour and skills, sites and premises, infrastructure, and housing.
- 3.5 The divergence between the two sets of forecasts (EBS and DTZ) is shown in the chart below. The explanation of this divergence - which

appears to be determined by two key differences in the underlying approaches adopted by the forecasting bodies - forms the substance of South Hampshire's critical examination of the EBS forecasts.



- 3.6 Both DTZ forecasts on the chart above are based on a GVA growth scenario of 3% per annum. The upper (initial) line assumes productivity growth of 2.1% per annum and the lower (refined), for which only the 2006 and 2026 points are currently available, assumes productivity growth of 2.3% per annum
- 3.7 Whilst the SEERA/EBS economic forecasts are derived from two alternative demographic projections, the PUSH/DTZ forecasts are derived from economic drivers. The GVA growth rates in the DTZ model beyond 2016 assume a continuation of the demand growth forecast up to 2016, although the productivity component of GVA growth increases over time as the employment component decreases. By contrast the SEERA approach appears to be demography driven in the longer term. The SEERA/EBS model assumes that over the longer term (after about 2016) supply side factors, such as the labour supply, become more important in influencing the performance of economies.
- 3.8 Secondly, the PUSH/DTZ economic forecasts, whilst benchmarked against national and regional economic forecasts provided by Cambridge Econometrics, are not affected by growth patterns elsewhere within the South East Region. By contrast the SEERA/EBS model is distributive, built around a “shift-share” methodology, which means that the amount of growth available to any one sub-area within the region is dependent not only on that area’s own economic performance but also on the performance of the other sub-areas within the region.
- 3.9 The marked slow-down of employment growth in South Hampshire beyond 2016 forecast by SEERA/EBS appears to result from the combined effect of these two key differences. Any assumption about major population and labour supply growth post 2016 in some other part of the region would result in a smaller slice of the total regional economic growth

“cake” being available for South Hampshire irrespective of the growth potential within the local economy and the economic aspirations of the PUSH authorities in the proposed sub regional strategy.

Means of achieving higher rates of growth in South Hampshire

- 3.10 The DTZ forecast scenarios for PUSH are based on a thorough analysis of the South Hampshire economy, a robust evaluation against the widely accepted national and regional benchmarks provided by Cambridge Econometrics, and supported by a comprehensive strategic framework for achieving higher rates of economic growth in the sub-region.
- 3.11 The key to achieving higher rates of growth in the South Hampshire economy will be to reinforce the economic drivers that have helped to shape current performance and to intervene, as far as possible, to remove the barriers to future economic development.
- 3.12 Although economic growth is largely driven by the activity of the private sector, responding to market forces, it is possible for the public sector to intervene positively in the sub-regional economic growth process. South Hampshire has seen a GVA growth rate of around 2.75% pa in recent years and DTZ are confident that a 3.5% rate is potentially achievable in future. Maintaining the recent growth level and subsequently achieving a higher growth rate will require a range of public sector support and intervention:-

Skills and training

- o Reduction of economic inactivity and unemployment (*which would also reduce the impact of higher growth rates on the requirement for additional housing*)
- o Capacity building amongst learning providers
- o Clarity on progression routes to higher level skills education
- o Improved retention of graduates
- o Strengthened and targeted provision of basic skills; and training for generic skills
- o Workforce development; and strengthening flexible learning and e-learning

Developing the industrial structure

- o Developing the business infrastructure, eg business support, business networks, knowledge transfer between HE/FE and business, place marketing
- o Improving strategic accessibility, eg address bottlenecks, invest in public transport, links to London and Heathrow, capacity of Southampton airport, broadband and utilities capacity to support economic growth
- o Transition of the economy, eg manage decline of traditional industries, promote transitional programmes particularly in the workforce

Land and property developments

- o Bringing forward a range of strategic employment sites across South Hampshire, including public sector investment where necessary

- Consolidating and intensifying employment development on existing sites
- Addressing shortage in starter and move-on business premises
- Engaging with business to understand their future requirements
- Providing a flow of employment land in the medium to long term

Productivity (overlaps and reinforces much of the above)

- Areas internal to the business, eg management skills, workforce skills, technology
- Areas external to the business (private sphere), eg quality of customers/suppliers, impact of competitors, availability of innovation
- Areas external to the business (public sphere), eg training, education and research systems, transport and accessibility, communications infrastructure

Quality of life

- Reinforce and develop the quality of life across the whole sub-region, eg attractive environment, high quality housing, retail offer, good services, leisure and tourism, good transport, vibrant urban areas, dynamic nightlife

3.13 The interventions above will require action and new initiatives by a range of public sector bodies. This document represents a further step in developing the necessary sub-regional policy framework including some further evolution of policies – notably those relating to land for employment development (SH5 – SH7) and skills (SH8) - as set out in Section 5. During the coming months, PUSH will engage with other bodies such as the Learning and Skills Council, to secure their commitment to the interventions necessary to increase South Hampshire’s economic performance.

Strategic criteria for the provision of employment land and floorspace

3.14 The forecasting work undertaken for PUSH by DTZ Pinda indicates that about 60% of the land required for employment growth will be for knowledge-based industries and business services. Most of the rest will be to provide new warehouse space for the predicted growth in distribution, transport and communications. In addition, there will be a requirement for sites for the development of advanced manufacturing in which South Hampshire has a particular strength. Conversely, a decline is forecast in traditional manufacturing which will release land for re-development. It is forecast that the land released from traditional manufacturing will be broadly equivalent to the amount required for new advanced manufacturing, although the location of all the existing sites may not meet the needs of new and expanding firms.

3.15 The preferred spatial option (described in more detail in Section 4 later in this document) is to focus on the two cities of Portsmouth and Southampton, and concentrate development within the existing urban areas. Recognising however, that not all greenfield development can be accommodated within the existing urban areas, a number of urban extensions will be developed while in the second part of the plan period,

two Strategic Development Areas are proposed. The location of employment development should reflect this strategy, with new employment sites being concentrated in the cities and towns, and in the Strategic Development Areas.

- 3.16 Large office developments are well suited to city and town centres and other locations which have good public transport accessibility. Their presence within the heart of the urban area can also help create vitality and underpin regeneration. In order to compete effectively for potential investment by major corporations and international firms seeking a presence in the sub-region, a small number of greenfield sites may be designated within the sub-regional strategy to address these exceptional requirements.
- 3.17 Further details of the scale and location of land for employment development will be submitted to the Regional Assembly in December 2005; in the meantime, a number of amendments are proposed to the South Hampshire Employment Policies (see Section 5) including a proposed new policy to reduce the loss of employment land to other uses and to ensure that the necessary range and type of employment sites are made available to enable economic growth.

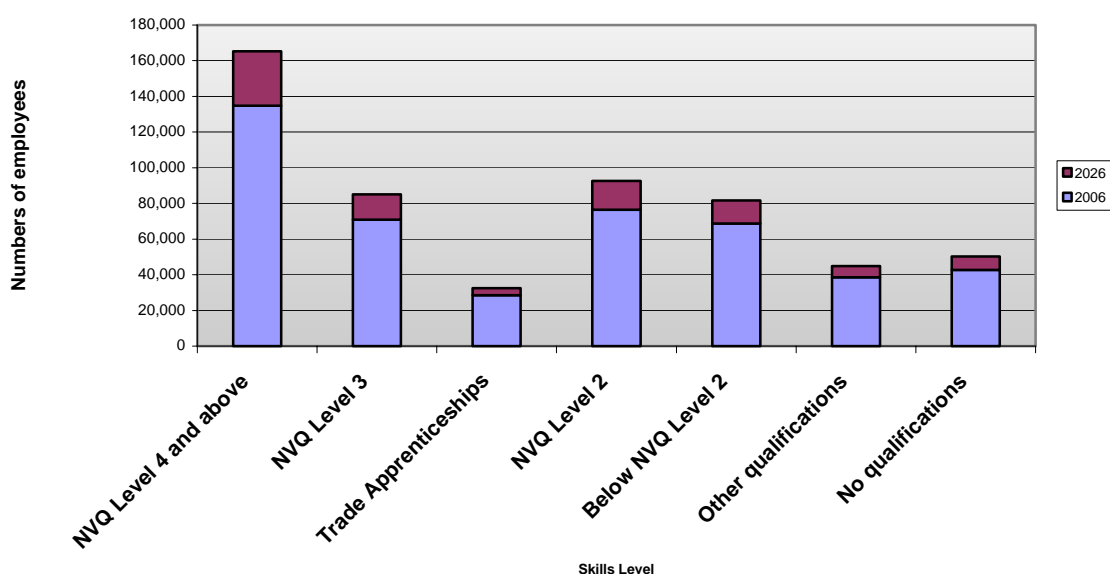
4. Options and Spatial Distribution

4.1 The PUSH Vision is to improve South Hampshire's quality of life in its broadest sense, including economic, social and environmental well being. Specifically, the Vision encompasses:-

- Promoting a buoyant and diverse economy
- Securing sustainable communities
- Safeguarding a quality environment
- Reducing inequalities & developing skills
- Providing quality housing for all
- Improving accessibility
- Providing quality recreational and leisure facilities
- Improving Health

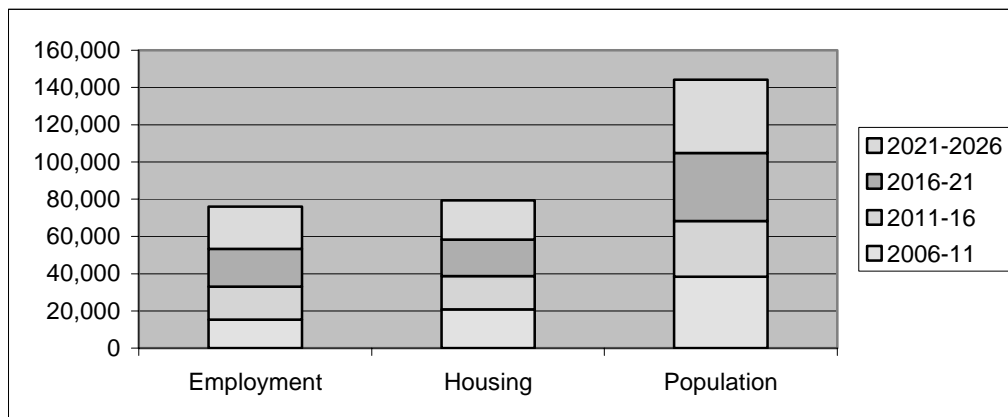
4.2 PUSH has set a target of achieving 3.5% per annum economic growth (GVA) by the final five years of the plan period but recognises that achieving this target will require new policy interventions and public initiatives. Those will take some time to have an impact: it will be difficult to increase employment land, skills and infrastructure over the coming five years, so economic growth 2006 – 11 is likely to be about 2.75% - i.e. remain at around its current level. Steadily rising growth is the aspiration thereafter with average growth rates as follows: 3.0% 2011 – 2016; 3.25% 2016 – 2021; 3.5% 2021 – 26. Productivity increases in line with the 2.3% per annum SEERA / Experian forecast for the South East Region and higher rates of economic activity are also sought.

4.3 The new public sector interventions include actions to substantially increase skill levels, notably at NVQ Level 2 and NVQ Level 4 and above. The graph below shows the number of people needed at each skill level in 2026 compared to now:-



- 4.4 Sufficient land employment development in the right locations and of the right quality will also be critical, gearing this predominantly to advanced business services, distribution and advanced manufacturing. The current supply of employment land is sufficient for the short term although work has yet to be completed on assessing whether all of this is of the right type/location for future business requirements.
- 4.5 **On the basis of demographic and economic forecasts, PUSH proposes provision for 80,000 new homes 2006 - 2026 at an overall average of 4,000 per annum:** slightly less up to 2016 and slightly more thereafter. The land supply for housebuilding in current plans plus predicted urban capacity is sufficient to sustain this rate of housebuilding up to around 2011. In any event, there is little scope for increasing the supply of land for development before 2011 due to the lead-in times for preparation of Local Development Documents.

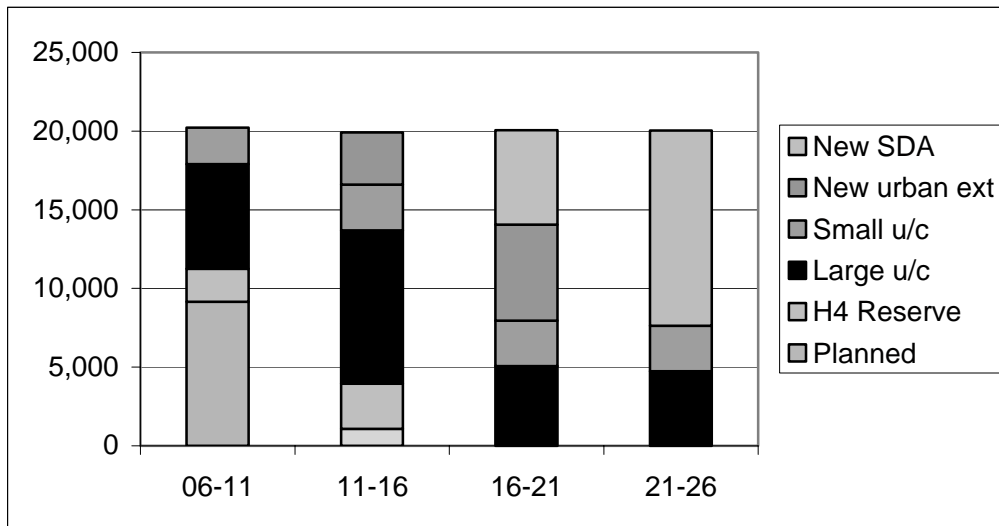
The overall scale of growth is summarised in the diagram below:-



- 4.6 Throughout the whole plan period, priority will be given to urban regeneration and development of urban brownfield sites. PUSH recognises that brownfield development alone cannot provide for the rate of housebuilding proposed and so some new greenfield land allocations will be needed.
- 4.7 A hybrid of the spatial options set out in the November 2004 submission is PUSH's preferred option. In the first half of the plan period, the focus will be on sites allocated in adopted and draft Local Plans, on brownfield sites within existing urban areas, plus a number of urban extensions. In the second half of the plan period this focus will continue but with greenfield development being concentrated in 'Strategic Development Areas'. The urban extensions and Strategic Development Areas will be located close to and with good transport links to the two cities and other major employment centres.
- 4.8 Each 'Strategic Development Area' would have a variety of types, sizes and tenures of new housing together with a full range of local facilities and employment opportunities. This form of development maximises the

sustainability of new greenfield development, as well as maximising the funds from national/regional agencies and from developer contributions towards affordable housing, improved transport and other infrastructure.

4.9 The contribution of these various elements to the hybrid option are shown diagrammatically below:-



4.10 Strategic Development Areas will be developed – related to Portsmouth and related to Southampton – reflecting the bi-polar nature of the sub-region. Investment in new infrastructure will be needed ahead of start of SDAs to pave the way for them. Further advice including the location of the SDAs will be submitted to the Regional Assembly in December 2005.

4.11 The strategy for South Hampshire remains one of ‘conditional managed growth. All development will be conditional on provision of transport and other infrastructure, for which a concordat is needed with Government. The rate of development will be related to the rate of economic/employment growth and provision of transport and other infrastructure.

4.12 Implementation and management of the strategy will require strong local leadership, through democratically accountable, local authority-led delivery arrangements.

4.13 The strategy will be reviewed periodically against performance targets e.g. job creation, productivity, infrastructure provision etc. A ‘Plan, Monitor and Manage’ approach will be operated which will delay greenfield land releases if more brownfield land becomes available. In particular, the rate of development in each Strategic Development Area will depend on the rate of investment in associated infrastructure and the availability of alternative brownfield sites within urban areas. If more urban brownfield sites become available than currently expected, the development of the Strategic Development Areas will be phased over a longer period with some phases not being built until after 2026.

5. Policy Development

- 5.1 The South East Plan articulates the sub-regional strategies through the medium of sub-regional policies. In the draft South East Plan on which public consultation recently took place, there are twelve sub-regional policies for South Hampshire (policies SH1-SH12) which closely follow those included in the submission by PUSH in November 2004. Part of the Advice now sought by the Regional Assembly is “*amendments required to sub-regional policies in the light of the draft sustainability appraisal from ERM, ongoing technical work, and comments received during the consultation period*”.

Sustainability Appraisal findings

- 5.2 In January 2005, the Assembly published, the document ‘Draft Sustainability Appraisal Report on the Consultation Draft of the South East Plan’. That document appraises the content of the draft Plan including the options and draft policies for the sub-regions. In respect of South Hampshire, the document states:

“As the options do not include detailed information on the spatial distribution of development, it is not possible to predict accurately how the proposals will impact on, for example, transport patterns, air quality, biodiversity, flood risk, rural issues etc. Likely implications are set out below.

- *Housing: All options will deliver the affordable housing required, and development will be based on a sub-regional housing needs assessment.*
- *Deprived communities: Focus of development is on Southampton and Portsmouth, two cities with pockets of relatively high deprivation. Reducing social deprivation is a stated aim in locating new development. However, there are areas outside these two cities which may not be assisted by the planned growth.*
- *Accessibility to services: Is explicitly addressed in some areas of new development, not in others. Rural accessibility is not addressed.*
- *Economic development: The strategy states that option A will not be sufficient to support growth and regeneration. Skills enhancement and development of knowledge-based industries are supported by the strategy.*
- *Land use: Options B, C and D will increase pressure on greenfield sites, and it is not clear that brownfield land will be given priority over greenfield sites.*

- *Transport: There are a number of strands of policy and supporting argument dealing with various aspects of transport, both improvement of public transport and road capacity increases. The overall balance is unclear, but the emphasis on non-car travel is not strong.*
- *Countryside: All of the options will place pressure on non-designated open space.*
- *Water resources: All of the options would result in water supply deficits in some parts of the sub-region without further development of water resource infrastructure.”*

5.3 The above commentary indicates many positive aspects of the four options put forward in the PUSH November 2004 submission and subsequently included in the draft South East Plan. The potentially adverse impacts identified will be addressed as part of further development of the preferred option during the coming months.

Ongoing technical work

5.4 Since Autumn 2005 when the policies were drafted, considerable further technical work has been undertaken which has been used to test the options for the scale and distribution of development. The outcomes of that further technical work – described in Section 2 – 4 above - have been translated into the proposed policy changes set out below.

Results of public consultation

5.5 SEERA identified around 160 comments made organisations/individuals on the consultation draft South East Plan which are specifically on, or relevant to, the draft South Hampshire sub-regional strategy/policies. A summary of the latter, by topic, is in the attached Appendix 2.

5.6 In general, environmental organisations, parish councils, and individuals feel the case for increased economic growth has not been made and express concern about or are opposed to the scale of development proposed. Economic bodies and local authorities who responded support the PUSH strategy of November 2004. Development interests either say that level of development is the minimum needed or call for much more.

5.7 The few organisations who express a preference between the spatial options set out in the November 2004 PUSH document, generally favour option B (Strategic Development Areas) or option C (Transport Corridors).

5.8 A range of respondents call for the sub-regional strategy to maintain/designate Strategic Gaps. There is support for prioritising affordable housing provision, for new infrastructure preceding development, and for the creation of an Implementation Agency. Various bodies express concern about the potential impact of development on the local

environment/countryside, and there are calls for various rural villages/parishes to be excluded from the Sub-region.

- 5.9 Other comments are on specific topics and/or are made by only one or two respondents.

Opinion poll results

- 5.10 The South East Counties commissioned pollsters ICM to establish the views of the whole population of the Region through a telephone survey of a representative sample. The sample size was sufficiently large to enable statistically reliable results to be produced for the nine sub-regions across the South East and the questionnaire included a few questions in each sub-region about matters specific to that particular sub-region.
- 5.11 In South Hampshire, people were asked for their views on the importance to be attached to economic growth and the location for new greenfield housing development. Over half (59%) of South Hampshire residents want more emphasis to be given to employment growth; just under a third want the same emphasis and only 8 per cent want less. The most popular preference for locating new development is a hybrid option of close to the cities, along major transport routes and in a few large developments. 40 per cent of those polled backed this combination. A further 16 per cent supported 'close to Portsmouth and Southampton' on its own, and another 17 per cent backed development solely 'along major transport routes. Only 14 per cent wanted to see development concentrated in locations other than these.
- 5.12 The full results are in Appendix 3.

PUSH response to the views expressed

- 5.13 Probably inevitably, environmental groups, some parish councils and a number of individuals call for less development than proposed by PUSH last Autumn while in contrast, some development interests argue it is insufficient. On this basis alone, PUSH's position could be said to be reasonable as being in the middle ground between these opposing camps. The support of SEEDA, HEP and the four local authorities who commented on the scale of development adds further endorsement. However PUSH attaches considerable weight to the views of the larger and statistically representative number of South Hampshire residents who in the opinion poll overwhelmingly backed giving more emphasis to economic growth, which is the main rationale for the scale of development proposed.
- 5.14 PUSH's preference for a hybrid spatial option is to be preferred is in line with the opinion polling which shows that a combination of locations to be the single most popular option amongst South Hampshire residents.
- 5.15 PUSH shares the concern that the development proposed in the sub-regional strategy should not have an unacceptable environmental impact; an important part of the PUSH Vision is to safeguard a quality environment

while the sub-region's environment is regarded as an asset in attracting business investment. PUSH proposes a new South Hampshire policy specifically to protect and enhance the sub-region's natural and built environment.

- 5.16 Specific changes are also proposed to other sub-regional policies to address other comments in Appendix 2, including a proposed new policy on Sub-regional/Strategic Gaps.

Proposed policy changes

- 5.17 The proposed policy changes are set out in Appendix 1. They deal with changes to policies relating to overall strategy, criteria for the location of employment, and affordable housing – topics on which the Regional Assembly's brief requires advice by 6 June 2005. They include three new policies related to these topics: Sub-regional Gaps; Allocation of Employment Sites; Conservation and Enhancement of South Hampshire's Natural and Built Environment.
- 5.18 Further work is needed before PUSH can submit changes to other policies, e.g. to include proposals for transport infrastructure improvements. Changes to those policies will be submitted to the Regional Assembly in December 2005 together with any other new policies which further technical work identifies as needed for South Hampshire.

6. Further Work

- 6.1 PUSH intends to undertake further work over the coming months towards the submission of further Advice to the Regional Assembly in December 2005 as required by the Assembly's Brief. This will include:-
- Checking the capacity and potential for cities and towns to deliver high quality housing, diverse employment base, enhanced entertainment, leisure and cultural facilities;
 - Assessing the chosen Strategic Development Areas and potential urban extensions for environmental impacts and against sustainability criteria, develop phasing regime and quantify infrastructure costs;
 - Checking feasibility with transport and utility providers;
 - Engaging with other partners – LSC, HEP, SEEDA, ODPM, etc;
 - Clarifying the amount of land required for advanced manufacturing growth;
 - Completing the assessment of availability / quality of existing employment land allocations;
 - Reconciling the amount/type available and that required;
 - Formulating draft District -level housing figures.