North Whiteley Business Case

On behalf of **The North Whiteley Consortium**

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1 Introduction

1.1 Background

1.1.1 This document has been prepared as a business case submission, on behalf of the North Whiteley Consortium, to the Solent Local Enterprise Partnership (LEP), which seeks funding to deliver a link road which will support a major housing and community development at North Whiteley in Winchester City Council area. Whilst the development will essentially deliver facilities for a medium sized community, including housing and retail units, these elements will be funded by private sector developers. **This application is being submitted to fund development and construction of the link road which will be required to service the North Whiteley community and mitigate the effects on the existing road network. Nevertheless, the business case also sets out the benefits of the wider development that the link road will help facilitate and support.**

1.1.2 The funding application has been compiled using the Department for Transport's (DfT) five-stage business case guidance for Transport Schemes[1], and is in line with the Treasury's advice on evidence-based decision making set out in the Green Book[2]. The five stage business case comprises of the following:

- **The Strategic Case** – To show the scheme is supported by a robust case for change that fits with wider public policy objectives;
- **The Economic Case** – To demonstrate value for money;
- **The Commercial Case** – To show the scheme is commercially viable;
- **The Financial Case** – To show the scheme is financially affordable;
- **The Management Case** – To demonstrate the scheme is achievable.

1.1.3 A previous submission was accepted by Solent LEP to provide funding for the road but on a different alignment through North Whiteley and associated development timeframe. However, as the project has been developed, the North Whiteley development Consortium identified a new road alignment and package of additional off-site highway improvements which, while meeting the same objectives, will provide improved benefits for both North Whiteley and the surrounding area. This alternative package of highway measures has been agreed with both Winchester City Council and Hampshire County Council. To comply with guidance and to ensure transparency across funding mechanisms, this business case document has been prepared to demonstrate both the requirement for the link road, and additional benefits which will be accrued by following this design over the original route.

1.2 Scheme Description

1.2.1 Whiteley is a small town in the county of Hampshire, between the cities of Portsmouth and Southampton and near the market town of Fareham. The community straddles the boundary between two council districts: the Borough of Fareham to the south and east, and the city of Winchester to the north and west. North Whiteley has been identified as the site of a major community extension which will include 3,500 new homes, schools, associated retail units, transport link routes and complementary transport infrastructure and services.

[1] The Transport Business Cases, Department for Transport, 2013

[2] The Green Book, Appraisal and Evaluation in Central Government, HM Treasury 2003

1.2.2 The development is situated to the north of Junction 9 of the M27 motorway which suffers from congestion in peak periods. Figure 1.1 below provides the location of Whiteley within the Winchester District.

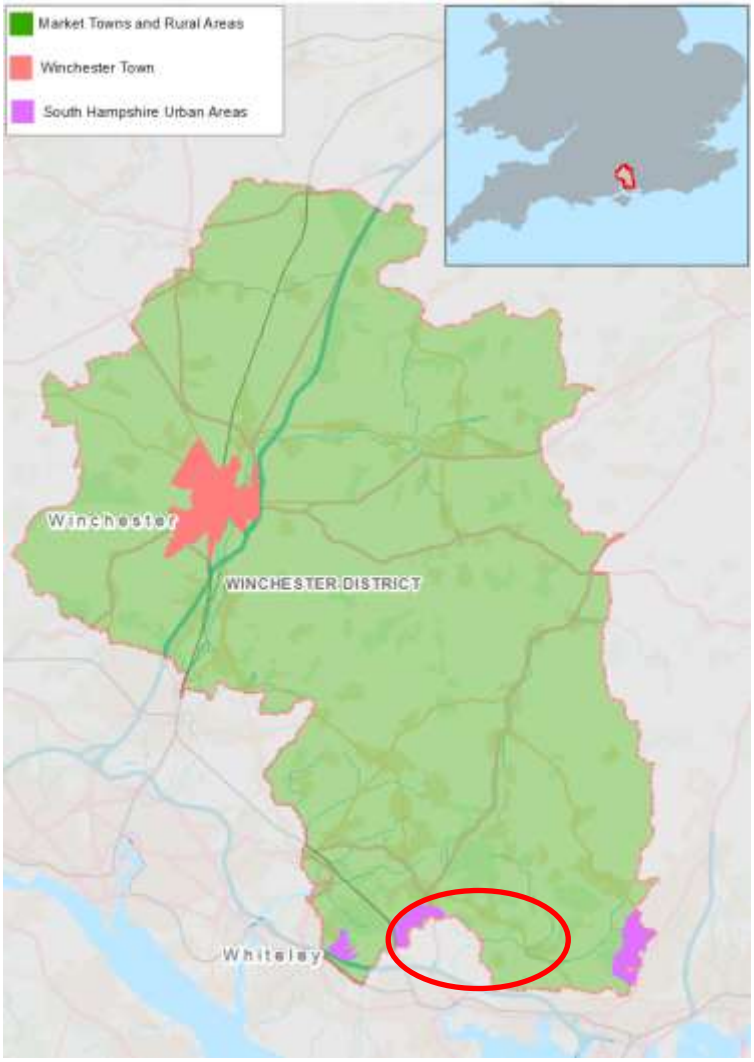

Figure 1.1 Winchester District Location Map

1.2.3 In addition to the 3,500 residential units, including affordable housing, the entire development will consist of the following:

- Identification of sites for 2 primary schools and 1 secondary school;
- Up to 2,002 sqm of flexible space for A1, A2, A3, A5, B1 and D1 including:
  - identification of two potential sites for children's nurseries,
  - provision of an extra care facility (with scope for all uses to revert to residential if there were insufficient market demand) in 2 local centres,
  - creation of a community building,
  - sports facilities (including pavilion, grass pitches and 2 all-weather pitches), allotments, landscaping, extensive recreation and play provision; and

- Major new transport improvements including:
  - creation of link roads between Whiteley and Botley Road,
  - wider highway works,
  - on site cycleway and footpath networks(including two localised footpath diversions),
  - bus priority measures,
  - car parking,
  - engineering works, flood attenuation network and service enhancements along with demolition of a number of existing on site structures.

1.2.4 As noted, a previous funding application was accepted and approved by Solent LEP for the design and construction of a link road through the site. As the master plan has progressed, an alternative alignment and wider package of highway improvement works have been identified which, for the same cost, provides additional benefits to both the development itself and the surrounding transport network. Figure 1.2 below illustrates both route options through the development. It should be noted that Option 2 also includes further highway infrastructure improvements to the south, extending as far as Roundabout R1 (Whiteley Way / Parkway / Rookery Avenue).

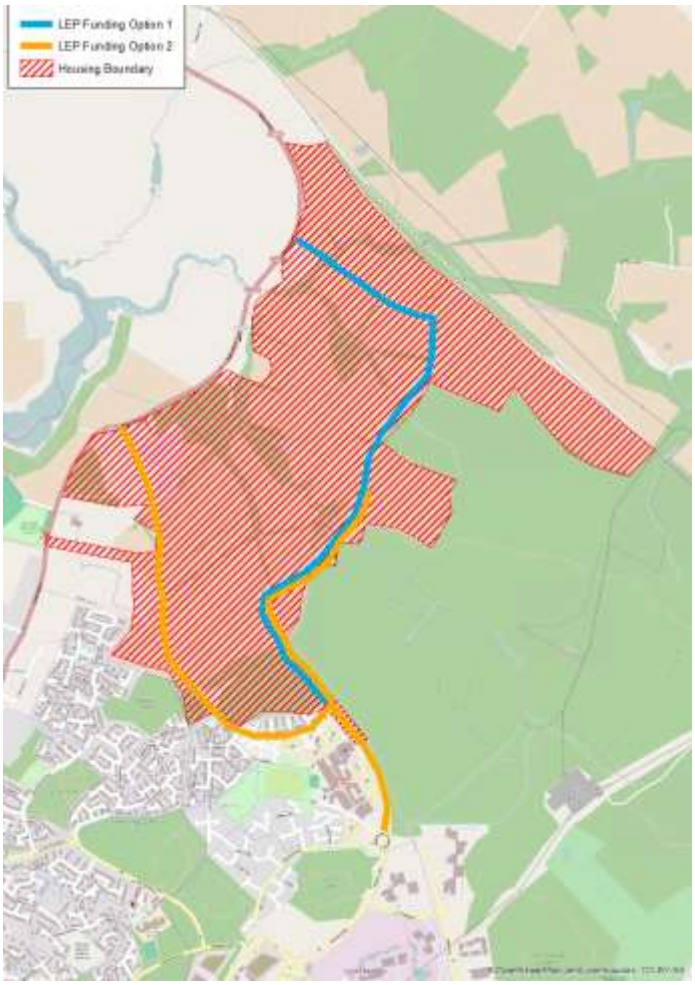

Figure 1.2 North Whiteley Link Road Options

1.2.5 The remainder of this document appraises Option 2[3], following the DfT business case guidance. The majority of the document will treat Option 2 as a standalone scheme, where appropriate comparisons are made which show distinct advantages and benefits of this alternative alignment and wider package of highway improvement works over the original route.

1.3 Process of Engagement

1.3.1 Extensive work has been taking place on the North Whiteley project for the last 4 to 5 years to fully understand its context and constraints, particularly relative to the green capital of the site. This has implied carrying out technical studies, production of capacity studies, completion of character assessments, viability review, progression of a green infrastructure framework and necessary surveys (transport, ecology etc.). Furthermore, the proposal has been subject to extensive consultation with officers, statutory bodies, technical stakeholders, neighbouring authorities, parish councils, local groups and the community through workshops and public exhibitions.

1.3.2 In producing the North Whiteley masterplan, the development Consortium worked closely with Winchester City Council officers, members of the Hampshire County Council and Whiteley Parish Council, and other key statutory bodies and stakeholders including Natural England, Forest Enterprise and the Environment Agency.

1.3.3 A public Forum has been set up to act as an informal advisory body to discuss and engage with the public on the following issues, and advise the relevant authorities accordingly:

- Advise upon a vision for the development of the MDA at North Whiteley which will act as a template for the masterplanning process and subsequent planning applications and keep this under review;
- Provide a response to key issues and options arising during the course of planning for and delivering the extension to the community at Whiteley, with input from local authorities, community groups and development interests;
- Act as a sounding board where ideas, options and issues relating to the development can be considered before becoming part of the formal planning process;
- Develop for consideration by the relevant authorities a community development strategy for the MDA;
- Consider and advise upon the community infrastructure required to support and integrate the new and existing communities;
- Consider good practice from development elsewhere and consider key findings for inclusion in the master planning process;
- Consider and advise upon a strategy for the ownership and management of the social infrastructure and community assets;
- Review progress reports on the development of the master plan and relevant planning applications.

1.3.4 The membership of the Forum is made up of Winchester City Council, Hampshire County Council, Fareham Borough Council, Whiteley Parish Council and Curbridge Parish Council.

[3] The Economic Case sets out details of the appraisal of the original and revised options. Option 2 is the only option considered in all other Cases

1.3.5 The breadth of work and the cooperative approach shows the continued commitment to the successful delivery of the project. The pre-submission representation to Policy SH3 dated 12 March 2012[4] provides a list of detailed reports prepared, completed baseline documents and planning application submission documents.

1.4 Stage of Application

1.4.1 The North Whiteley Development is currently at an advanced stage of planning, all master-planning and design along with private finance initiatives have been completed and are assured. The North Whiteley Urban Design Study and Master Planning Framework were submitted with the representations in March 2012. A full planning application is due for submission to Winchester City Council in December 2014. The application will be accompanied by a full Transport Assessment, an Environmental Impact Assessment, a Design and Access Statement, and a Design Code.

[4] Appendix 2 from Issue 6 – North Whiteley – Policy SH3, October 2012, Terence O'Rourke Ltd on behalf of North Whiteley Consortium

2 Strategic Case

2.1 Introduction

2.1.1 This chapter presents the Strategic Case for investment in the key highway link (to the A3051 Botley Road) and wider package of highway improvement works which will serve both the new development to the north of Whiteley and the existing Whiteley settlement. It is structured in a way to demonstrate a logic trail running from the need for housing through to the requirement for the road and how this is ultimately necessary to facilitate and support the housing development.

2.1.2 The main aim of the Strategic Case is to determine whether or not this investment is needed. It should demonstrate that there is a case for change and therefore include a clear rationale for making the investment and show how it will contribute to national, regional and local policy objectives.

2.1.3 The remainder of this chapter begins by setting out briefly, in Section 2.2, the geography of the Winchester District housing market, the current housing situation in the District area and why there is a need for additional housing development. Winchester's housing market is facing several challenges but due to limited resources and competing priorities there is a need to identify a primary focus for intervention. This was centred on housing affordability and inadequate housing supply, as there was evidence to suggest that these are currently the most pressing issues.

2.1.4 Section 2.3 explains how the North Whiteley development will make a significant contribution to the identified housing requirements, in terms of both supply and affordability. It is planned to deliver 3,500 new houses which represents almost a third of the dwellings target of 12,500 set out in the Winchester District Local Plan Part 1 Core Strategy (March 2013). The rationale behind locating the development to the north of Whiteley, the scope and objectives of the scheme and a succinct description of main facilities and infrastructure to be provided are also presented in this section.

2.1.5 In order to deliver the identified levels of housing and economic development an efficient and sustainable transport network is essential. An analysis of the existing transport conditions relative to the site in relation to access and accessibility, walking, cycling, public transport and local and strategic highway issues is included in Section 2.4.

2.1.6 The following sections (Section 2.5 to Section 2.7) show how the link road and wider package of highway improvement works are a key requirement to facilitate and support the North Whiteley development and therefore meet the housing requirements. They outline the proposed access and movement strategy for the site, detailing the vehicular access strategy and proposed package of measures targeted at encouraging sustainable travel behaviour.

2.1.7 North Whiteley will assist the Council in delivering the housing and growth needed within the District in a sustainable, timely and properly phased manner. It will help support the delivery of a better balance and mix of uses in the Whiteley area, delivering significant social, economic and infrastructure benefits, particularly with respect to transport infrastructure, public transport improvements and education facilities to create a more sustainable community. Section 2.8 discusses these benefits in more detail.

2.1.8 Finally, Section 2.9 sets out how the development integrates with a range of policy objectives, both locally and nationally. The section sets out considerable evidence demonstrating how both the link road, and the housing development it will facilitate and support, has a strong fit with a range of housing and transport policies and strategies.

2.2 Setting the Scene

2.2.1 Winchester District, as set out in Figure 1.2, is a large and varied District, predominately rural, with over 50 smaller settlements. The District's landscape, its location in relation to road and rail links and its proximity to the Southampton and Portsmouth conurbation have influenced the way the settlements have evolved and developed, resulting in towns and villages with strong, distinctive characters such as the prosperous market town at Whiteley.

2.2.2 The Winchester City Council is committed to promoting sustainable communities in the District area where people will want to live and work, both now and in the long-term and providing opportunities for growth and diversity.

Housing Supply

2.2.3 Housing supply is key amongst the topics dealt with by the City Council with a clear expectation set through their Local Plan to include a numerical target for housing provision, sub-divided into spatial areas as necessary, over the next 20 years. This reflects the fact that the majority of the new building over the Plan period in Winchester District will consist of housing and that this is regarded as essential for future economic prosperity, as well as community and individual wellbeing.

2.2.4 Winchester District relates to both the Central and South Hampshire housing markets[5]:

- High levels of in-migration from Southampton and Eastleigh are recorded in the Winchester urban area but are countered by reciprocal movements. Moreover, Winchester experiences considerable levels of in-migration from households moving to the District from outside Hampshire, including Greater London and the rest of the South East;
- The City of Winchester labour market attracts travel to work movements from across the north and north east of the district. The influence of the labour market also extends to the south, with significant travel-to-work movements from Eastleigh and Southampton and to the south east of Winchester District boundary from Fareham, Havant and Portsmouth;
- The settlements located to the southern periphery of Winchester District quite clearly relate to the urban parts of South Hampshire in both labour market and housing market terms.

2.2.5 In February 2013, following the Examination into the soundness of the Winchester District Local Plan Part 1, a report by the Government's Planning Inspectorate[6] to Winchester City Council and South Downs National Park Authority recommended a new dwellings target of 12,500 across the district from 2011 to 2031, with a delivery rate of 625 per year on average. This was considered to be both realistic and positive in terms of the economic growth of the district.

2.2.6 The proposed target was an increase on the previous figure of 11,000 set out in the submitted Winchester District Local Plan Part 1 (WDLP) Draft of June 2012, to reflect the additional capacity identified at North Whiteley and in the Market Towns and Rural Area and achieve general conformity with the revoked South East Plan (2009).

[5] Winchester Housing Market and Housing Need Assessment Update, A Final Report to Winchester City Council, 2012, DTZ London

[6] Report to Winchester City Council and South Downs National Park Authority, February 2013, Nigel Payne BSc (Hons), Dip TP, MRTPI, MCMI, The Planning Inspectorate

Affordable Housing

2.2.7 Winchester District housing markets are characterised by good quality housing but housing costs are very high and create affordability problems for many households. Winchester Housing Strategy 2013/14 – 2018/19 (2013) emphasises the fact that inadequate housing supply and housing affordability are the most significant challenges of the Winchester District housing market. Indeed, the Planning Inspectorate's report also identified a need for affordable housing in the area, with an 'annual affordable housing delivery rate of around 250 units to be achieved.'

2.2.8 The demand for affordable housing shows a significant upward trend and the competition for homes continues to be high. This is the result of a combination of factors:

- In-migration of affluent families or individuals from areas such as London and the South East that often have significant purchasing power and can drive demand and prices up;
- High levels of car ownership and a high degree of strategic accessibility make it easy for many District locals to commute to higher paid employment elsewhere and increase their purchasing power, driving house prices higher and giving rise to demand for more affordable housing for the rest of the locals who choose to work within the District;
- Changes in demographic structure such as migration rates and population age structures can pose additional pressure on housing supply.

2.2.9 The average household income is less than £50,000 per annum across the District while the average District property prices are in excess of £375,000. To purchase a property in the 'lower quartile' of District house prices would require an income of over £63,000 and deposit of over £21,000. On this basis, almost 80% of Winchester District households would be unable to buy a lower quartile home. Affordability is also an issue in the market rented sector with 30% to 45% of households and over 70% of newly formed households unable to afford to rent a 2 bedroom property on the market unassisted. The people most likely to face affordability problems are young families or young entrepreneurs and individuals seeking employment for the first time. This causes people to move outside the District to meet their housing requirements or live in unsuitable housing conditions so they can stay close to education or employment opportunities[7].

2.2.10 Analysis of the population and type of households in the area provides further insight into potential causes of housing issues. One demographic factor that is particularly significant is the age distribution as housing needs and homeownership rates vary considerably by age. Most of the population growth in Winchester District between 1998 and 2008 has been driven by the 45-64 age group which reflects the long standing and gradual trend towards an ageing population[8]. Population projections indicate that by 2031 over a third of the District's population will be of pensionable age[9]. A particular requirement emerges to plan for the need of the ageing population especially because older people are more inclined to under-occupy homes.

2.2.11 The lack of a range of housing types at a variety of affordability levels to address the various housing needs of the District's resident and working population can act as a threat to economic development in the area. The number of jobs in Winchester significantly exceeded

[7] All figures: Winchester Housing Strategy 2013/14 – 2018/19, February 2013, Winchester District Strategic Partnership and Winchester City Council

[8] ONS Mid-Year Population Estimates

[9] Winchester District Development Framework, 'Plans for Places – After Blueprint', Housing Technical Paper, June 2011, Winchester City Council

the number of households with a ratio of jobs to households of 1.4:1 in 2006[10]. The inability to find appropriate housing close to one's job often results in a long commute that has economic, social and environmental costs for both individual households and the region as a whole.

2.2.12 Furthermore, the price, type, size and quality of the housing stock and the attractiveness of the neighbourhoods in Winchester determine the kind of jobs that are created here. Research[11] suggests that an area with a diverse and affordable housing supply has better chances to attract a wide range of employers because it can support a workforce with a wide range of skills. In contrast, an area with a shortage of housing supply and high prices is only sought by highly skilled people who can command high wages and as a result will only attract employers who can pay such high wages.

2.2.13 Good quality housing and a properly operating housing market are of central importance to Winchester's social, economic and environmental sustainability. As described above, the housing market is not currently meeting Winchester's housing needs and there are several limitations that need to be overcome. In the light of that, the Housing Strategy sets out a range of priorities and objectives that aim to achieve the following:

- Maximise the supply of high quality affordable housing in rural and urban areas and support the creation of mixed, inclusive communities;
- Improve the housing circumstances of vulnerable and excluded households to enable them to get the accommodation and support they need;
- Support local people to access high quality and affordable housing that meets their needs;
- Make best use of the existing housing stock and ensure that new homes are appropriate for their context, are of sufficient size and of a suitable design; and
- Support the District's residents to achieve their aspirations and support new communities to establish themselves.

2.3 North Whiteley Development Description and Rationale

2.3.1 The previous section set out affordability and supply issues in the housing market in Winchester. This section looks at how the proposed development at North Whiteley can make a positive contribution to a medium to long-term plan to alleviate these problems.

Strategic Fit of Scheme Location

2.3.2 Whiteley is a relatively new town which has been developed from the 1980's onwards. It is located in southern Hampshire between the cities of Portsmouth and Southampton, partly in the Winchester district and partly in Fareham. The small community of around 3,000 houses is situated slightly to the north of Junction 9 of the M27 motorway and has a population of approximately 6,000 residents.

2.3.3 Land at North Whiteley has been under consideration for a potential housing development since the 1970's. The Whiteley Local Plan suggested the possibility of an extension of the community to the north to be carried out after 1996. For this particular purpose, the area was sewered and consent was granted for a new road which would link with Botley Road and provide a northern access to the site. However, the development was not delivered because

[10] Winchester Housing Market and Housing Need Assessment Update, A Final Report to Winchester City Council, 2012, DTZ London

[11] Housing supply and the interaction of regional population and employment, May 2006, Wouter Vermeulen (CPB, VU), Jos van Ommeren (VU), CPB Discussion Paper

Winchester District Local Plan adopted in 1998 found no justification to allocate additional land at North Whiteley, based on housing needs at that time.

2.3.4 In March 2013, the Local Plan adopted under the name of Winchester District Local Plan Part 1 Joint Core Strategy reaffirmed the existing outstanding housing commitments and the requirement for the Council to consider bringing forward any additional land to meet the District's housing requirements during the plan period. The location of housing has been subject to intense consultation and appraisal of different options.

2.3.5 The Joint Core Strategy[12] ensured that development across the District happened in the right places. Hence, in line with the Partnership for Urban South Hampshire (PUSH) Economic Development Strategy (October 2012), the assessment of options and the public comments, it was decided that the major greenfield development which is required in the PUSH part of the District should be focused on the urban peripheral areas, at West of Waterlooville and North Whiteley. This was defined as 'South Hampshire Urban Area' and is one of the three main spatial areas in the Local Plan.

2.3.6 The main objective of the spatial strategy of the Local Plan was to allocate housing developments to those locations that already have large existing and planned employment areas, supporting the economic growth objectives of PUSH. It is believed there are significant benefits to allocating large sites for development rather than dispersing development on several smaller sites.

2.3.7 Furthermore, the North Whiteley Consortium supports the approach to focusing the majority of housing provision at strategic sites and the proposed housing distribution across the district, especially concentrating approximately 50% of the district's future housing growth in the South Hampshire Urban Area. This will help Winchester City Council contribute towards meeting PUSH's housing target.

2.3.8 Development at North Whiteley meets these criteria and has the potential to deliver the balance and mix of housing needed within the District in a sustainable, timely and properly phased manner, together with the supporting infrastructure.

Objectives

2.3.9 The following have been identified by the Council as objectives of the strategy for development at North Whiteley:

- To provide a good mix of high quality homes for the whole community, including 40% affordable homes to meet the shortfall in supply within the Winchester District;
- To make a considerable contribution to local development needs and wider PUSH development aspirations;
- To improve internalisation and sustainability of traffic movements within Whiteley by offering the necessary level of housing in close proximity to one of the largest employment concentrations in Hampshire, comprising the Solent and Segensworth Business Parks;
- To achieve a modal shift from private car to more active modes of transport by providing a range of sustainable travel choices;
- Improve education infrastructure and community facilities by offering better infrastructure to meet the needs of the existing and new community;

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- Help create healthier lifestyles and improve biodiversity by providing extensive areas of green infrastructure; and
- Minimise the environmental impact of the development and provide net gains wherever possible.

Scope

2.3.10 The site identified for the housing development is set out in Figure 2.1 below. It lies to the north of Whiteley and is bounded to the east by extensive woodland, to the west by the settlement of Curbridge and Botley Road, and to the north by the Fareham to Eastleigh railway line. Total surface area is approximately 203 hectares of which around 108 hectares are unconstrained and suitable for development. The remaining land can provide significant amounts of green space needed to support the new community, help mitigate any potential negative environmental impacts and avoid the potential risks to the internationally important Solent Special Protection Area.

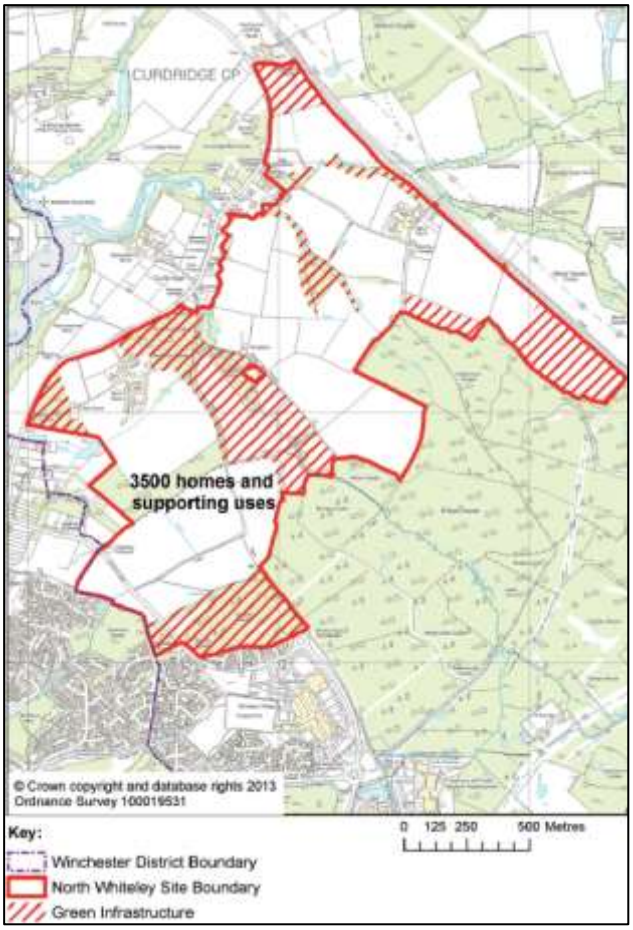

Figure 2.1 Map of North Whiteley development

2.3.11 The proposals for the site comprise 3,500 new homes and associated infrastructure. The site boundary is identified by the broad red line in Figure 2.1. As well as the housing, the site comprises:

- Identification of sites for 2 primary schools and 1 secondary school;
- Up to 2,002 sqm of flexible space for A1, A2, A3, A5, B1 and D1 including:

- identification of two potential sites for children's nurseries,
- provision of an extra care facility (with scope for all uses to revert to residential if there were insufficient market demand) in 2 local centres,
- creation of a community building,
- sports facilities (including pavilion, grass pitches and 2 all-weather pitches), allotments, landscaping, extensive recreation and play provision;

- Major new transport improvements including:
  - creation of link roads between Whiteley and Botley Road,
  - wider highway works,
  - on site cycleway and footpath networks(including two localised footpath diversions),
  - bus priority measures,
  - car parking,
  - engineering works, flood attenuation network and service enhancements along with demolition of a number of existing on site structures.

Development Phasing

2.3.12 The North Whiteley Consortium has worked closely with the Local Planning and Highway Authorities to identify a development phasing strategy that provides the most efficient means of building out the site and its associated infrastructure.

2.3.13 The housing development is planned to be phased over 12 years. Table 2.1 below sets out the details of the phased programme.

Year	Units per years	Units cumulative
1	100	100
2	210	310
3	300	610
4	350	960
5	350	1310
6	350	1660
7	360	2020
8	360	2380
9	360	2740
10	360	3100
11	300	3400
12	100	3500

Table 2.1 Phasing of Housing Units in North Whiteley

2.3.14 The table shows that the development at North Whiteley will make a significant contribution to the target of 12,500 to be delivered by 2031. Indeed the development would deliver over one quarter of the total.

2.3.15 More specifically in terms of the phasing, the existing Bluebell Way and Whiteley Way will begin to be extended into the site from the south in Year 1. In addition, development will also commence at the proposed western access junction on Botley Road, which forms the western end of Bluebell Way. It is anticipated that 100 dwellings will be occupied by the end of Year 1. The extension of Bluebell Way into the site will also open up the southern primary to enable commencement of its construction, which is anticipated to open by the end of Year 2.

2.3.16 By the end of 2017, Bluebell Way will connect with Botley Road to provide a new connection between Whiteley and Botley Road for all traffic. Development will continue to build out around these 3 initial development parcels, with Whiteley Way extended up and over the central green corridor (by way of a clear span bridge) to provide access to the proposed secondary school site by the end of Year 3 for HCC to commence construction, which is intended to be open by the end of Year 5. A total of c610 dwellings are therefore planned to be completed and occupied by the end of Year 3.

2.3.17 As development continues to fill out the southern half of the site, development will also continue northwards along Curbridge Way, in the first instance, to enable strategic foul drainage infrastructure to be delivered on the western edge of the development along protected routes back to the foul main.

2.3.18 In Year 6, as development continues to extend northwards along Curbridge Way, the northern primary school site will be opened for commencement of construction, via a temporary 'construction only' access utilising the existing access track to Barn Farm. This will allow the second primary school to be opened by the end of Year 7.

2.3.19 In parallel, towards the end of Year 7, the northern link to Botley Road (combination of Whiteley Way and Curbridge Way) will be made, with a new northern access junction to Botley Road, north of Curbridge, and provide permanent access to the northern Primary school in time for its opening.

2.3.20 Year 8 will then see the commencement of development and occupation of dwellings at the northern access junction, and completion of development in the southern half of the site.

2.3.21 Year 10 will see finalisation of Whiteley Way running through the new northern local centre, with full development of 3,500 dwellings and associated infrastructure and uses, by the end of Year 12, which is anticipated to be in 2027.

2.4 Current Transport Situation

2.4.1 The previous sections of this chapter have set out housing context, and presented the evidence base to support the need for new and affordable housing in the area. It was also shown why North Whiteley will provide a positive contribution to meeting the District's housing targets and objectives. Since the application and this business case are in relation to the key highway link which will be required to service the North Whiteley community, this section discusses the transport aspects associated with the investment in this link. It is acknowledged in a number of policy documents (see Section 2.9 on how the investment fits with local policy objectives) that the investment is crucial to the development coming forward within the proposed timescales and will unlock this important growth area and all its associated benefits.

Transport Assessment

2.4.2 It should be noted that, in accordance with the National Planning Policy Framework, the North Whiteley Consortium of developers commissioned work to provide highway and transport

advice in support of the outline planning application for the development. The Transport Assessment (TA) delivers detailed consideration of the proposed development and sets out the transport issues associated with the site. This included:

- Existing Transport Conditions, presents analysis of the existing transport conditions relative to the site in relation to access and accessibility, walking, cycling, public transport and local and strategic highway issues;
- Development Proposals, provides details of the development proposals;
- Access and Movement Strategy, outlines the proposed access and movement strategy for the site, detailing the vehicular access strategy and proposed package of measures targeted at encouraging sustainable travel behaviour;
- Development Travel Demand, provides details on the traffic model development and validation process, forecast methodology, traffic generation and distribution assumptions;
- Traffic Impact Assessment without Mitigation Package, introduces the future year modelling assignments undertaken for Reference Case and Test Case scenarios with and without the proposed development, but without the proposed package of mitigation measures. The results of junction capacity results are also set out;
- Proposed Package of Highway Mitigation Measures, outlines the off-site highway improvements identified to support the development;
- Traffic Impact Assessment with Mitigation Package introduces the future year modelling assignments undertaken for Reference Case and Test Case scenarios with and without the proposed development, with the full proposed package of mitigation measures. The results of junction capacity results are also set out;
- Sensitivity Test Yew Tree Drive introduces the future year modelling assignments undertaken for Reference Case and Test Case scenarios with Yew Tree Drive bus gate open to all traffic. The results of junction capacity results are also set out;
- Proposed Phasing of Infrastructure Improvements sets out the proposed phasing of the off-site highway improvements, based on the proposed build-out of the development's infrastructure and network modelling results;
- Conclusions, presents a summary and the conclusions of the Transport Assessment.

2.4.3 In particular, the TA identifies a package of transport measures aimed at encouraging sustainable transport modes, providing safe and suitable access to the site for all people, and identifying the improvements that can be undertaken within the transport network that cost effectively limit the significant impacts of the development. For brevity, the level of detail in the TA is not repeated here and reference should be made to that document if further information is required. Nevertheless, this section outlines the key aspects of the TA to explain how the road link addresses the current transport issues in the area and generates a series of transport benefits for new and existing residents in Whiteley.

2.4.4 The following paragraphs in this section set out existing arrangements for the provision of transport services in the area. This is then followed by an explanation of the planned services that will be introduced to support the development at North Whiteley.

Walking and Cycling

2.4.5 Pedestrians and cyclists are well catered for within Whiteley itself, with numerous foot and cycle ways linking the developed areas and leisure routes through Whiteley. There is a

footway on the eastern edge of Whiteley Way between its junction with Rookery Avenue and Marjoram Way and a foot / cycleway on the western edge between its junction at Whiteley Village and Bluebell Way, however the remainder of this link has no provision.

2.4.6 Connections between Whiteley and the wider community are lacking however, with the exception of a foot / cycleway between Whiteley and Swanwick Station.

2.4.7 There is currently no provision for these sustainable modes crossing the M27 which leads to very few people choosing to walk and cycle in this direction as this represents a significant barrier. Walk and cycle travel is also limited to the north along Botley Road which has no facilities along much of its length and is a rural road with a derestricted speed limit.

Public Transport

Buses

2.4.8 Although the South Hampshire area generally is covered by a dense network of both urban and inter-urban services, with few exceptions this level of service is generally limited to areas south of the M27. To the north, coverage both in terms of routes and frequencies is considerably lighter.

2.4.9 At the time of writing the provision of support to public and community transport services within Hampshire has been the subject of a review by Hampshire County Council, A report to the Executive Member of Economy, Transport and Environment was received on the 27 October 2014 entitled, “Passenger Transport Review and Hampshire Concessionary Travel Scheme 2015/16”. The proposals which have been recently ratified by the Executive Member confirm changes to bus services in the Whiteley area, principally services 26 and 28. Due to the timescales involved in undertaking the technical work in support of the Transport Assessment for the North Whiteley development and this Business Case, it has been agreed with Hampshire County Council that the North Whiteley Transport Assessment will assume the pre-review position. This reflects the imminent planning submission and the complexity of the transport modelling and other related impacts involved.

2.4.10 The following public bus routes currently serve the Whiteley and Burridge areas:

Service/ Operator	Route	Frequency	
		Mon – Sat	Eve & Sun
26 First	Fareham – Segensworth – Park Gate – Burridge – Curbridge – Botley – Hedge End	7 journeys per day	No service
28 First	Fareham – Segensworth – Whiteley – Park Gate – Locks Heath	120 mins	No service

Table 2.2 Existing Public Bus Services in Whiteley and Burridge

2.4.11 The table indicates that services operating within the Whiteley and Burridge areas are characterised by a small number of routes, relatively low frequencies and a limited range of destinations. In particular, the table shows that there are no evening or Sunday services to and from the area. In addition, the services will alter in 2015 with the 26 being dropped.

2.4.12 Service 28 serves the existing Whiteley area, including stops at Parkway (for the employment area), Whiteley Village (the leisure and retail area) and Sweethills Crescent (for the residential area).

2.4.13 Service 26 does not serve Whiteley but operates via the A3051 via Burridge between Swanwick and Botley; this is adjacent to parts of the proposed development at its northern end.

2.4.14 Service 26 offers 7 journeys per day between Fareham, Burridge, Botley and Hedge End. Route 28 operates approximately every two hours during Monday to Saturday daytimes between Fareham, Whiteley and Locks Heath, including peak time journeys in both directions.

2.4.15 In addition to these services, the two major employers at Whiteley – Zurich and National Air Traffic Services (NATS) – operate their own private shuttle services. Zurich's network includes buses from Gosport, Portsmouth, Waterlooville, Fareham and Locks Heath, whilst NATS operate shuttles from Swanwick and Southampton Airport Parkway railway stations, plus an intersite service to their Swanwick operations.

2.4.16 The evidence shows that Whiteley Village and the immediate surrounding area therefore are relatively poorly served by public transport bus services at present.

Rail Services

2.4.17 There are two National Rail stations within 2km of the site boundaries, at Swanwick to the south and Botley to the north-west. The two stations lie on separate rail lines and have differing levels of service with access to a wide range of destinations.

2.4.18 Swanwick station lies on the main 'West Coastway' line along the south coast between Southampton and Brighton. Table 2.3 indicates the key routes serving this station:

Operator	Route	Frequency	
		Mon – Sat	Sundays
South West Trains	Southampton Central – St Denys – Bitterne – Woolston – Hamble – Bursledon – Swanwick – Fareham – Cosham – Fratton – Portsmouth & Southsea	60 mins	60 mins

Operator	Route	Frequency	
		Mon – Sat	Sundays
Southern Railway	Southampton Central – Swanwick – Fareham – Cosham – Havant – Emsworth – Chichester – Barnham – Horsham – Crawley – Three Bridges – Gatwick Airport – East Croydon – Clapham Junction – London Victoria	60 mins	No service
	Southampton Central – Swanwick – Fareham – Cosham – Havant – Emsworth – Chichester – Barnham – Durrington on Sea – West Worthing – Worthing – Lancing – Shoreham by Sea –Portslade – Hove – Brighton	60 mins	No service

Table 2.3 Existing Rail Services – Swanwick Station

2.4.19 Table 2.3 shows that Swanwick is served by three trains per hour in each direction between Southampton Central and Fareham. One train per hour then operates to Portsmouth & Southsea, whilst two trains per hour then continue to Havant and Chichester; from this point, one train operates via Horsham and Gatwick Airport to London Victoria and one operates to Worthing and Brighton.

2.4.20 Only the South West Trains service between Southampton Central and Portsmouth & Southsea operates on a Sunday with a frequency of one train per hour. There is considerable difference in the frequency of train services from Swanwick to Southampton (three per hour) and Portsmouth (one per hour).

2.4.21 Botley station lies to the north-west of North Whiteley and is on the Fareham to Eastleigh line. Proposals exist for an Eastleigh Chord which would enable direct access between Portsmouth and Fareham and Southampton Airport Parkway, as well as creating additional capacity for services between Portsmouth and Southampton.

2.4.22 Trains currently serving Botley station are shown in Table 2.4 below:

Operator	Route	Frequency	
		Mon – Sat	Sundays
South West Trains	London Waterloo – Woking – Farnborough – Basingstoke – Winchester – Eastleigh – Hedge End – Botley – Fareham – Cosham – Fratton – Portsmouth & Southsea – Portsmouth Harbour	60 mins (30 mins Mon-Fri peak)	60 mins

Note: Some minor intermediate stations omitted for brevity.

Table 2.4 Existing Rail Services – Botley Station

2.4.23 Table 2.4 illustrates that an hourly service operates at all times (except for an enhanced service during Monday to Friday peak periods) between London Waterloo and Portsmouth Harbour via Basingstoke and Fareham. Journey times are relatively slow, reflecting the stopping/semi-fast nature of the service which primarily provides for local needs, as well as providing the only direct service from Fareham to London Waterloo.

2.4.24 Overall, it has been shown that while rail services do provide access to a relatively wide range of locations, the frequency of services is poor.

Local and Strategic Highway Network

Whiteley Way

2.4.25 To the south of the proposed North Whiteley development lies Whiteley Way which currently provides the main access point for all of the existing Whiteley settlement. Whiteley Way runs from Junction 9 of the M27 in the south to the junction with Bluebell Way in the vicinity of Whiteley Town Centre in the north. Whiteley Way is a two lane dual carriageway between M27 Junction 9 and the roundabout junction with Rookery Avenue. From this junction north to Bluebell Way the link is a two way single carriageway providing access to the residential areas of Whiteley, the Solent Business Parks and Whiteley Town Centre.

Yew Tree Drive

2.4.26 Yew Tree Drive is a key link between Whiteley Way and the main residential areas of Whiteley. At its western end Yew Tree Drive has a connection to Botley Road which has a bus gate and has in the past been closed to all traffic with the exception of buses. Recently, the Hampshire County Council Executive Member for Economy, Transport and Environment has agreed to the permanent opening of Yew Tree Drive Bus Gate, subject to an application to FBC for a variation to the Condition within the original Planning Permission for the bus gate for restricted use.

A3051 Botley Road

2.4.27 The A3051 Botley Road forms the frontage of the North Whiteley site along its western edge. The road forms a key link between Swanwick in the south and Botley and Hedge End in the north. The road is generally rural in nature with a derestricted speed limit along the majority of its length with the exception of the points where it passes through Burridge and Curbridge.

Bluebell Way

2.4.28 Bluebell Way currently forms the access road for a limited amount of residential development and a Tesco superstore and links with the northern end of Whiteley Way.

Leafy Lane

2.4.29 Leafy Lane provides the only other means of limited vehicular access and egress to Whiteley, other than using Junction 9 of the M27, as well as providing access to residential dwellings in the eastern part of Whiteley, as a result of this the link is heavily traffic calmed to prevent excessive use of this link as a through route.

Swanwick Lane

2.4.30 Swanwick Lane provides a highway connection between the A3051 Botley Road and the A27 to the west, towards Southampton. Swanwick Lane is a single carriageway road with frontage development along the majority of its length and is subject to a 30mph speed limit.

M27

2.4.31 The M27 provides the primary route for strategic movement to and from Whiteley providing access to key destinations such as Southampton and Portsmouth as well as linking with the A27 and M3 and the national motorway network.

Existing Traffic Conditions

2.4.32 A suite of traffic surveys has been undertaken and/or purchased from Hampshire County Council in order to fully understand the traffic conditions surrounding the North Whiteley site

and to aid in the construction of a traffic model for the North Whiteley development. The flows generated by the 2009 base year SATURN model constructed by consultants PBA for both the AM peak (08:00-09:00) and PM peak (17:00-18:00) were used to assess the traffic flows on the road network in the vicinity of the North Whiteley development site and to feed into junction capacity assessment models for key junctions on the network.

2.4.33 The following local junctions were analysed as part of the modelling exercise to understand their operational performance:

- A334 High Street / Mill Hill / B3354 Winchester Street / Church Lane Priority Junction;
- A3051 Botley Road / A334 Station Hill / Mill Hill Priority Junction;
- Whiteley Way / Bluebell Way Roundabout Junction;
- Whiteley Way / Marjoram Way / Whiteley Town Centre Roundabout Junction;
- Whiteley Way / Parkway Priority Junction (It should be noted that this junction was not included in the scoping discussions but it has since been considered a key junction in the network and therefore capacity assessment has been undertaken);
- Whiteley Way / Rookery Avenue / Parkway Roundabout Junction;
- M27 Junction 9;
- A27 Southampton Road / Segensworth Road / Barnes Wallis Road / Little Park Farm Road;
- A3051 Botley Road / Swanwick Lane Junction.

2.4.34 Each junction has been assessed in terms of its modelled capacity against the following thresholds:

- Signalised Junctions - Degree of Saturation (DOS) up to 100%;
- Priority Junctions - Ratio of Flow to Capacity (RFC) up to 1.00.

2.4.35 The results have shown that Junction 9 which provides the key access point to the M27 for residents of Whiteley is experiencing significant congestion. Table 2.5 shows that the junction operates above capacity in the 2009 Base scenario with a maximum DOS of 131% on Whiteley Way in the PM peak period.

M27 Junction 9						
Base Year	**AM Peak (08:00 – 09:00)**			**PM Peak (17:00 – 18:00)**		
	Max DOS	**MMQ**	**Delay (Secs)**	**Max DOS**	**MMQ**	**Delay (Secs)**
A27 South	100%	149.04	286.72	104%	124.88	389.24
M27 Eastbound Off Slip	110%	100.93	238.31	87%	33.64	26.75
Works Unit	0%	0	0	0%	0	0
Whiteley Way	92%	22.24	66.56	131%	241.08	1182.65
Hill Coppice Road	0%	0	0	0%	0	0

M27 Westbound Off Slip	98%	39.96	71.34	96%	28.34	80.33

DOS = Degree of Saturation, MMQ = Maximum Mean Queue

Table 2.5 M27 Junction 9 2009 Base Model Results

2.4.36 It was also found that the Whiteley Way / Rookery Avenue / Parkway junction operates above capacity in the 2009 Base scenario with a maximum DOS of 311% on Whiteley Way North in the PM peak period and that the A27 Southampton Road / Segensworth Road / Barnes Wallis Road / Little Park Farm Road roundabout operates above capacity in the 2009 Base scenario with a maximum DOS of 113% on A27 Southampton Road in the AM peak period.

Personal Injury Collision Data

2.4.37 In order to establish the existing highway safety record within the vicinity of the site an assessment has been carried out of Personal Injury Collision (PIC) data. PIC data was obtained from Hampshire Constabulary for the five year period from 01/01/2008 to 31/12/2012 for the study area which includes the local road network surrounding the site.

2.4.38 The results of the PIC data analysis indicate that that that there is a general trend of shunt type collisions occurring in areas where there is slow moving traffic caused by congestion across the network but specifically in the vicinity of the M27 Junction 9 and Segensworth.

Conclusion of Current Transport Situation

2.4.39 In summary, an assessment of existing transport conditions in the development area found that:

- Accessibility by walking and cycling is good within Whiteley itself, however connections to the wider community are lacking;
- It has been identified that bus services operating within the Whiteley and Burridge areas are poor, characterised by a small number of routes, relatively low frequencies and a limited range of destinations. While rail services provide access to a range of stations, the services are infrequent;
- An overview of the operation of the local highway network has identified the location of existing traffic congestion pinch-points, namely at the Whiteley Way / Rookery Avenue / Parkway roundabout, M27 Junction 9 and Segensworth Roundabout; and
- A review of local PIC data confirms congestion issues in this area;

2.4.40 These identified existing issues and constraints have been used to inform the development proposals and supporting transport strategy included in Sections 2.5 (the link road) and 2.6 (associated Travel Plan).

2.5 Highway Impact and Mitigation

2.5.1 This section provides details of the link road and wider package of highway improvement works as well as the impacts associated with the proposed scheme and how these will contribute to the North Whiteley development. It should be noted, however, that the new road through the development will be supported by a number of other complementary changes in transport provision which will also have a positive impact. These are discussed in the following section.

2.5.2 The original infrastructure bid was in relation to securing a key highway link (to the A3051 Botley Road) which will serve both as an access road and provide a vital link from the

development to the North of the site. This is identified as items 1.1 and 1.12 (the dark green line, highlighted blue) on Figure 2.2 below. It will serve both the new development and the existing Whiteley settlement which, at present, suffers from severe congestion at peak times and has only one main highway access onto the M27. It is essential to the development area coming forward within the proposed timescales and will unlock this important growth area and all its associated benefits.

2.5.3 Since the time of the original submission, the North Whiteley Consortium has continued to consult with the Local Planning and Highway Authorities and Town Council on the proposed phasing of the development and its associated infrastructure.

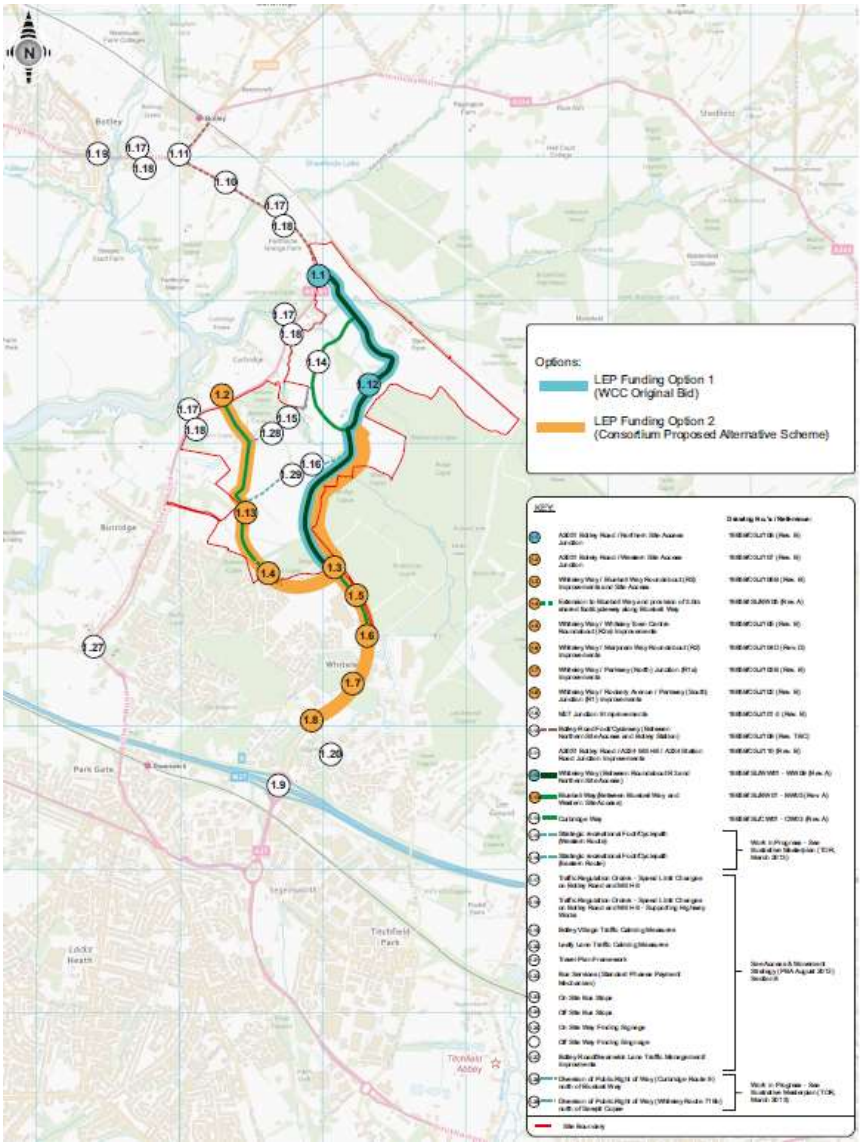

Figure 2.2 North Whiteley Road Options

2.5.4 As a result of this exercise, the Consortium has identified an alternative package of highway works which deliver the objectives of the initial scheme, supports the early provision of housing in accordance with the proposed phasing strategy, as well as deliver additional benefits through significant highway capacity and sustainable travel enhancements within Whiteley. The revised development phasing also provides the most efficient means of building out the site, delivers critical highway and education infrastructure early, and addresses

concerns raised by the authorities on alternative phasing options. This alternative scheme has been agreed with WCC and HCC.

2.5.5 The alternative scheme consists of the early provision of Bluebell Way (shown on Figure 2.2 in light green, and highlighted orange, and consisting of items 1.2, 1.13 and 1.4), construction of the first 1,000m of Whiteley Way up to the proposed secondary school access loop, at the point where Whiteley Way meets Curbridge Way (southern end of 1.14), as well as significant enhancements to off-site highway capacity and sustainable travel infrastructure within Whiteley (items 1.3, 1.5, 1.6, 1.7, 1.8 and an additional scheme at Marjoram Way) as described below:

- Early completion of Bluebell Way, providing a new highway route through the new development between the existing community and Botley Road, enabling early housing delivery, early access to the first primary school site and join the new and existing communities to the existing highway network to the north;
- Early provision of the first 1,000m of the Whiteley Way extension through the new development, enabling early housing delivery and early access to the secondary school site. The exact extent of this infrastructure element is dependent upon further more refined costings in due course;
- Significant highway capacity enhancements within the existing Whiteley area, connecting with the impending HA scheme at M27 J9 and providing improvements to the entire length of Whiteley Way;
- The provision of sustainable travel infrastructure within Whiteley in the form of a strategic foot/cycleway along the entire length of Whiteley Way, connecting local residents, employees and visitors to Whiteley Town Centre with the wider network; and
- Early provision of bus priority within Whiteley, to support the proposed bus services associated with the North Whiteley development.

2.5.6 In terms of highway impact and mitigation, the TA provides details of the following:

- An assessment of the likely travel demand arising from the development;
- An assessment of the traffic impact without any form of mitigation;
- Details of the proposed package of transport and highway measures aimed at mitigating the travel demand arising from the proposed development;
- An assessment of the traffic impact with the mitigation package in place; and
- A sensitivity test of the effect of opening Yew Tree Drive bus gate to all traffic movements.

Traffic Modelling Results – Without Mitigation

2.5.7 A review of the impact of traffic generated by the North Whiteley development on the local road network has been undertaken as part of the TA, without mitigation in place.

2.5.8 The results from this assessment indicate that the development will have an impact on some of the key junctions in the area, especially junctions on Whiteley Way and the M27 Junction 9. However, it should be noted that there is a significant amount of congestion predicted on the network in the '2026 base' scenario before the development traffic is added in. This high level summary of existing congestion is likely to exacerbate the impact that the development traffic

has at the individual junctions. This also suggests that all of the housing development will be dependent on new transport infrastructure i.e. without the new infrastructure the transport network will not provide a 'reasonable level of service' as defined in WebTAG Unit A2.3.

Traffic Modelling Results – With Mitigation

2.5.9 It is recognised that a number of measures will be required to mitigate the impact of the development on both the local and strategic highway network. The road link will therefore be supported by a comprehensive package of highway improvements at the following locations:

- A3051 Botley Road / A334 Mill Hill / A334 Station Hill junction;
- Whiteley Way / Bluebell Way roundabout junction;
- Whiteley Way / Whiteley Town Centre roundabout junction;
- Whiteley Way / Marjoram Way / Whiteley Town Centre roundabout junction;
- Whiteley Way / Parkway priority junction;
- Whiteley Way / Rookery Avenue / Parkway roundabout junction; and
- M27, Junction 9 (as an additional improvement to that being implemented by the HA in the short term).

2.5.10 All highway design proposals have been subject to Stage 1 Road Safety Audit, with Designers Responses produced. Where possible, these proposals have also been submitted to HCC for Concept Design Check, in order to confirm the in-principle agreement prior to submission of the planning application.

2.5.11 In addition to the above proposals, a financial contribution is proposed towards the cost of implementation of the Whiteley Town Council's improvement scheme at the Parkway / Leafy Lane junction and towards traffic calming measures within Botley village and along Swanwick Lane.

2.5.12 As well as providing increased vehicular capacity the off-site highway improvements will provide significant pedestrian and cycle benefits and will include bus priority measures where appropriate and achievable.

2.5.13 A review of the impact of the traffic generated by the North Whiteley development with the full suite of mitigation measures in place has been tested in 2026 against the '2026 base' scenario. This assessment demonstrates that overall, the road network in the vicinity of the development site is operating considerably better in the '2026 base + development (with mitigation)' scenario than the '2026 base' scenario with generally less congestion throughout the network.

2.5.14 Full details of the results from the traffic modelling with mitigation measures are provided in the TA. For brevity, this section only includes a brief summary of what was considered to be sufficient in demonstrating the net benefits of the North Whiteley development.

2.5.15 Table 2.6 sets out the '2026 base + development (with mitigation)' scenario AM and PM demand and actual traffic flows through the junctions in the wider study area. At all junctions and for each peak period, the difference between demand and actual is less than in the 'no mitigation' scenario by up to 80% indicating that the mitigation measures are having a marked improvement in the operational performance of the network.

2026 Base + Development (with mitigation)	Demand Flows		Actual Flows		Difference between actual and demand	
	AM Peak	PM Peak	AM Peak	PM Peak	AM Peak	PM Peak
A334 Station Hill / B3035 Botley Road	1,743	1,605	1,609	1,560	134	45
Bader Way / Whiteley Lane / Lady Betty's Drive Roundabout	1,276	1,007	1,196	915	80	92
Whiteley Lane / Cartwright Drive / Barnes Wallis Road Roundabout	1,721	1,464	1,630	1,367	91	97
Cartwright Drive / Segensworth Road	1,422	1,450	1,353	1,363	69	87
Fontley Road / Segensworth Road / Mill Lane	434	941	408	881	26	60
A27 Southampton Road / Cartwright Drive / St Margarets Lane / Warsash Road Roundabout	4,624	4,508	4,505	4,324	119	184
A27 Southampton Road / Mill Lane / Mill Street	3,303	3,250	3,219	3,031	84	219
Titchfield Gyratory	3,857	3,765	3,772	3,545	85	220
Fontley Road / Titchfield Lane / River Lane	24	22	24	22	0	0
A27 Southampton Road / Telford Way Roundabout	2,492	2,680	2,429	2,616	63	64
A27 Southampton Road / Bridge Road / Botley Road / Hunts Pond Road Roundabout	3,175	3,050	3,100	2,969	75	81
A27 Bridge Road / Locks Road / Middle Road	1,721	1,763	1,704	1,740	17	23
A27 Bridge Road / Station Road / Brook Lane Roundabout	2,884	2,637	2,853	2,591	31	46
A3051 Botley Road / Station Road	1,687	1,336	1,641	1,286	46	50
A3051 Botley Road / Middle Road	1,166	869	1,116	823	50	46
A27 Bridge Road / Barnes Lane	2,086	2,336	2,066	2,313	20	23
A27 Bridge Road / Swanwick Lane	2,704	2,829	2,679	2,805	25	24

Table 2.6 2026 Base + Development (with mitigation) Total Traffic Flow through wider study area junctions

2.5.16 The assessment of the summary statistics as taken from the SATURN model also demonstrates that the mitigated development improves the network conditions when compared to the '2026 base' scenario. Overcapacity queues are reduced by approximately half and average speeds in the network increase by approximately 15% with the development in place compared to the '2026 base' scenario. Total travel time in the network has been reduced despite there being an increase in total trips on the network which would tend to

increase travel time as it is a function of time per trip multiplied by the total number of trips. The total travel distance is greater in the '2026 base + development (no mitigation)' scenario due to people choosing to use longer but less congested routes around the road network using links that have been opened up by the development.

2.5.17 Table 2.7 shows that the M27 Junction 9 roundabout is predicted to operate at capacity in the '2026 base + development (with mitigation)' scenario in both peak periods, with all arms at the junction predicted to operate at a lower DOS in the '2026 base + development (with mitigation)' scenario than in the '2026 base' scenario.

M27 Junction 9						
	2026 Base			2026 Base + Development (with mitigation)		
	Max DOS	MMQ	Delay (Secs)	Max DOS	MMQ	Delay (Secs)
AM Peak (08:00 – 09:00)						
A27 South	100%	154.69	450.66	61%	14.47	26.34
M27 Eastbound Off Slip	141%	157.93	780.36	99%	73.12	64.87
Works Unit	0%	0.00	0.00	0%	1.41	0.32
Whiteley Way	100%	120.54	634.99	89%	28.47	59.71
Hill Coppice Road	0%	0.00	0.00	0%	0.00	0.00
M27 Westbound Off Slip	198%	243.38	1807.03	77%	32.77	29.15
PM Peak (17:00 – 18:00)						
A27 South	100%	60.68	165.55	77%	15.63	23.19
M27 Eastbound Off Slip	146%	282.17	885.45	92%	56.78	44.55
Works Unit	1%	1.41	0.01	1%	1.41	0.21
Whiteley Way	100%	157.90	505.74	100%	217.19	339.89
Hill Coppice Road	0%	0.00	0.00	0%	0.00	0.00
M27 Westbound Off Slip	98%	32.56	84.12	97%	36.30	78.77

DOS = Degree of Saturation, MMQ = Maximum Mean Queue

Table 2.7 M27 Junction 9 2026 Base + Development (with mitigation) Model Results

2.5.18 A maximum DOS of 97% is predicted on both the M27 Eastbound off slip and Whiteley Way in the AM peak compared with a DOS of 141% and 100% on these arms respectively in the '2026 base' scenario. In the PM peak the junction is predicted to operate at a maximum DOS of 100% on the Whiteley Way arm which is the same as in the '2026 base' scenario.

2.5.19 Although the junction is operating at capacity the junction improvement works are showing significant improvements over the '2026 base' scenario. It is also considered that the improved junction design provides the maximum capacity of the junction within the available land whilst providing for improved public transport and walk / cycle provision through the junction.

2.5.20 It is considered that the package of measures put forward mitigates fully the impact of the North Whiteley development and provides a net benefit over and above the base situation. In other words, the future road network is predicted to operate better with North Whiteley and its associated package of measures than without.

2.5.21 An assessment of the operation of the merge/diverge lanes at Junction 9 of the M27 motorway demonstrates that the junction is predicted to require upgrades in the 2026 base scenarios without development. Consequently the assessments demonstrate that no further upgrades over and above that required to accommodate the traffic in the base scenario are required with the full North Whiteley development in place.

Yew Tree Drive – Open to All Traffic

2.5.22 A sensitivity test has been undertaken as part of the TA to assess the relative impact of opening Yew Tree Drive bus gate to all traffic, which is a proposal not included within the North Whiteley package of mitigation measures.

2.5.23 At the time of writing this report, it is understood that following a trial opening of the link to all traffic, HCC's Executive Member for Economy, Transport and Environment has confirmed the permanent opening of Yew Tree Drive to all traffic subject to an application for the variation of a condition within the original planning application for the link.

2.5.24 The results of the assessment show marginal improvements in junction delay at key junctions, with further information set out within the North Whiteley TA.

2.6 Sustainable Transport Strategy

2.6.1 Section 2.4 set out details of the transport provision in the Whiteley area. This was followed by Section 2.5 which outlined details of the road link and the positive impacts that this would generate. However, it should also be noted that a range of complementary transport measures have been designed which will generate further positive impacts. These have been included in a Sustainable Transport Strategy and details of this are included in this section.

2.6.2 A comprehensive public transport, pedestrian and cycle strategy is proposed for the North Whiteley development to encourage modal shift away from private car travel towards pedestrian, cycle and public transport movement for journeys within a suitable distance. These are set out below.

Pedestrians and Cyclists

2.6.3 North Whiteley development benefits from being located within walking and cycling distance of a large range of local facilities, amenities, employment, health facilities and public transport connections.

2.6.4 The North Whiteley development provides the opportunity to bring significant improvements to both the surrounding pedestrian and cycle network and the internal street network for the local community and future residents of the development. The overarching objectives of the proposed pedestrian and cycle strategy are as follows:

Off Site

- Connect the North Whiteley development with key strategic movement corridors to accommodate safe and convenient pedestrian and cycle movement to Whiteley, Segensworth, Botley and beyond;
- Improve connectivity and safety for pedestrians and cyclists between the site and local facilities, amenities and public transport infrastructure; and

- Improve access to the existing footpath network.

On Site

- Provide a network of safe, convenient and attractive routes within the development area, connecting off-site provision with internal uses and facilities based on a simple hierarchy; and
- Improve the local network of recreational routes by making the site more accessible to the public and providing new permitted footpaths.

2.6.5 The pedestrian and cycle strategy will incorporate the following elements which the North Whiteley Consortium are committed to delivering.

Off Site

- A continuous segregated off road foot / cycleway between Botley Rail Station in the north and Segensworth Roundabout in the south, connecting with the HA's proposals at M27 Junction 9 and HCC's Segensworth Action Plan proposals. This route will provide easy access for pedestrians and cyclists to connect to Whiteley and provide a commuter route through to Botley Station, Solent Business Parks and Segensworth; and
- A way-finding strategy incorporating strategic off-site signage combined with on-site strategic and local signage to provide directional information and facilitate ease of movement through the area.

On Site

- Segregated or shared pedestrian and cycle routes adjacent to the vehicle routes to allow separation of vulnerable users from vehicles;
- A network of pathways within the development plots to facilitate movement between the main route network and destinations across the development;
- A network of permitted recreation routes taking the form of foot / cycle paths connecting with existing routes in the area; and
- A way-finding strategy incorporating strategic and local signage.

2.6.6 It is considered that this comprehensive package of pedestrian and cycle measures will facilitate sustainable travel by foot and bike within the North Whiteley development and the surrounding area. The measures will improve access by these modes for existing residents in the area and provide key facilities for future residents of the development.

Public Transport Strategy

2.6.7 Public Transport provision forms an important part of the access strategy for the North Whiteley development as, in contrast to current service provision, it will provide a real alternative to the private car in forming either complete journeys or part of longer journeys, for example providing access to rail stations for onward travel to strategic destinations.

2.6.8 The bus service proposals for North Whiteley will be phased with the build out of the proposed development, with a different level of service provided in each phase in order to utilise the new highway connections provided by the development, and to satisfy the growing level of travel demand resulting from the development.

Objectives

2.6.9 The levels of development identified for the South Hampshire sub-region will require enhanced public transport systems to ensure continued prosperity and quality of life, and to be sustained into the future. Public transport provision therefore provides the cornerstone of a sustainable transport strategy to support the North Whiteley development proposals.

2.6.10 The primary objectives of this public transport strategy are to:

- Ensure that public transport is considered as an integral component of the development's design, enabling efficient movement of buses through the site and simple routes which maximise frequency;
- Thus minimising the number of vehicle trips generated by the development by shifting trips to existing or new public transport services;
- Simultaneously reducing the number of vehicle trips through Junction 9 of the M27 by providing new services and infrastructure across the junction.

2.6.11 Provision of public transport services to North Whiteley are required to:

- Integrate the site with existing public transport services;
- Deliver a high level of public transport accessibility through the development and local area;
- Create linkages between the new communities within the development, existing communities and centres of activity;
- Provide a hierarchy of routes which link the site's internal spaces;
- Create a permeable development where all new housing lies within reasonable walking distance of a bus stop.

2.6.12 Therefore, the North Whiteley development proposals provide an opportunity to create a step change improvement in public transport provision and use in the Whiteley area.

Public Transport

2.6.13 Proposed improvements relating to the North Whiteley development can be separated into three distinct categories:

- Enhancements relating to the provision of public bus services;
- Provision of new "closed door" education services for primary age pupils;
- Improvements to bus-related infrastructure such as bus stops and priority measures.

2.6.14 Each of these is explored in further detail below.

Public Bus Services

2.6.15 As explained in Section 2.4, the existing level of bus service provision in the Whiteley area is poor with a low level of service and consequently a low modal share. The North Whiteley development would, as part of the transport proposals, provide a step change in bus service provision in the local area, being phased across the construction and build out of the site. The transport proposals include the provision of two new high quality bus services involving an

improvement in access to bus-based public transport in the local area. In addition passenger facilities and information systems will be substantially enhanced and bus priority measures introduced at key locations in order to minimise any delay to services and increase the attractiveness of services to passengers.

2.6.16 Two new bus services, the W1 and W2, are proposed. The W1 service would operate 7 days a week connecting North Whiteley with Fareham, Segensworth, Botley and Hedge End. The W2 service would operate Monday to Saturday connecting North Whiteley with Warsash, Locks Heath, Park Gate, Swanwick, Burridge and Segensworth. The services would operate in final form at 20 minute and 30 minute frequencies.

2.6.17 The W1 and W2 bus services would be delivered in a phased manner during the build-out of the development and in conjunction with the provision of highway infrastructure. It is proposed that the bus services will be implemented in 4 distinct development phases:

- Phase 1: On occupation of the 1st dwelling;
- Phase 2: On occupation of the 600th dwelling (and upon completion of the new highway connection from Bluebell Way to Botley Road, north of Burridge);
- Phase 3: On occupation of the 1,300th dwelling; and
- Phase 4: On occupation of the 2,000th dwelling (and upon completion of Whiteley Way and Curbridge through the development to Botley Road, north of Curbridge).

2.6.18 At each phase, a different level of service will be provided in order to utilise the new highway connections generated as part of the development, and to satisfy the growing level of travel demand resulting from the development. Given that there is a very poor existing level of provision in Whiteley, it is proposed that North Whiteley is served by completely new routes which will replace the existing services in the area from Phase 2 onwards.

2.6.19 Bus service proposals for each stage of the development are detailed below. For all options, daytime services operate between 0630 (0730 on Saturdays) and 1930, evening services operate between 1930 and 2330, and Sunday services between 0800 and 1930.

Phase 1

2.6.20 The first phases of development will see the occupation of dwellings in the south east and south west of the North Whiteley development site. Both Whiteley Way and Bluebell Way will be extended from their current termini into the development area, and development will be located to the east of A3051 Botley Road with appropriate access provided.

2.6.21 There will be no road or pedestrian access between the south western development areas and those located in the south east of the site at this early phase, until such time that Bluebell Way is completed.

2.6.22 Therefore it is proposed that an interim shuttle bus service is introduced, which will operate between Botley railway station, the south western development area, Swanwick railway station, Yew Tree Drive, Parkway, Whiteley Centre and the south eastern development area. This service will be open to the general public, so can be used by residents of the development areas, Burridge and the existing Whiteley area, as well as employees at the Solent Business Park.

2.6.23 This service will be operated by one vehicle at a frequency of approximately every 60 minutes during Monday to Saturday daytimes.

Phase 2

2.6.24 Phase 2 commences following completion of the 600th dwelling, or the opening of Bluebell Way between the A3051 and Whiteley Centre, whichever is later. In order to respond to growth in travel demand from the site the routeing and pattern of bus service provision will be amended to provide a more efficient network, faster journeys between the key points and more frequent services.

2.6.25 The shuttle bus services, together with services 26 and 28, are withdrawn and replaced with a new network. Two services will be introduced as follows:

- Service W1: Fareham – Segensworth – Park Gate – Swanwick – Whiteley – North Whiteley – Botley – Hedge End;
- Service W2: Warsash – Locks Heath – Park Gate – Swanwick – Burridge – North Whiteley – Whiteley.

2.6.26 Service W1 will provide the main link between the development and the key local centres of Fareham and Hedge End, and will operate every 30 minutes during Monday to Saturday daytimes and every 60 minutes during Monday to Saturday evenings and on Sundays.

2.6.27 This service will operate via the A27, Mill Lane and Segensworth Road to the Segensworth industrial area where the service will divide, with one bus per hour operating via Segensworth Road (the current bus route) and one via Brunel Way. The service also operates via the Segensworth West industrial area before proceeding to Park Gate and Swanwick railway station; from this point the route operates north on the A3051 before entering Whiteley via Yew Tree Drive. Services operate via Parkway to serve the Solent Business Park, then via Whiteley Way to Whiteley Town Centre. From this point buses operate into North Whiteley; services first extend along Whiteley Way into the expanding development areas in the centre of the development site, before returning to Whiteley Town Centre and operating along Bluebell Way via the southern development areas. After leaving North Whiteley the service operates via Botley to Hedge End villages and superstores.

2.6.28 In order to reduce journey times and make the services more attractive, Sweethills Crescent in Whiteley will no longer be served. However, the majority of the dwellings in this area will be within 400 metres of a bus stop either on Yew Tree Drive to the south or on Bluebell Way to the north.

2.6.29 Service W2 provides more local links between Warsash, Locks Heath, Swanwick railway station, Burridge, Whiteley and North Whiteley, and will operate every 60 minutes during Monday to Saturday daytimes only.

2.6.30 Provision of this service is driven by the need to maintain a convenient bus service for Burridge, which would otherwise be bypassed by the new service W1, and to provide links between the major residential areas of Locks Heath, Whiteley and North Whiteley with Swanwick railway station and the major employment areas at Solent Business Park and Whiteley Town Centre. It also provides a third bus per hour between North Whiteley and Swanwick railway station.

2.6.31 Services operate in a one-way loop at the southern end, running from Locks Heath Centre via Peters Road and Brook Lane towards Warsash, and via Warsash Road and Lockswood Road towards Whiteley. Buses operate via Locks Road to Park Gate, and via Station Road northbound and Botley Road southbound to access the A3051. From there the route passes Swanwick station and operates directly north via Burridge to the new access onto Bluebell Way, where services turn eastwards into North Whiteley. From there services operate via Whiteley centre, Parkway and Yew Tree Drive to return to the A3051 and the return route to Warsash.

2.6.32 Services W1 and W2 together provide three buses per hour between North Whiteley, Whiteley and Swanwick railway station, which will dramatically improve the potential for rail-bus interchange at this location.

2.6.33 This package of services in Phase 2 can therefore be summarised as follows:

Service	Route	Frequency	
		Mon – Sat	Eve & Sun
W1	Fareham – Segensworth – Park Gate – Swanwick – Whiteley – North Whiteley – Curbridge – Botley – Hedge End	30 mins	60 mins
W2	Warsash – Locks Heath – Park Gate – Swanwick – Burridge – North Whiteley – Whiteley	60 mins	No service

Table 2.8 Phase 2 Bus Service Package

2.6.34 At this stage of the development, this level of frequency on the two services are anticipated to meet demand and assist in stimulating growth in patronage from the Whiteley area as a whole, as well as improving frequencies and connections to Warsash, Locks Heath, Segensworth and Hedge End.

2.6.35 In the evenings and on Sundays, an initial service of every 60 minutes is proposed to operate between Hedge End and Fareham only, with no services to Warsash. These services will operate directly along Southampton Road instead of via Segensworth West, and will not serve Brunel Way.

Phase 3

2.6.36 Phase 3 commences from the occupation of the 1,300th dwelling on the development to respond to the anticipated increased demand. The frequency of service W2 (Warsash to Whiteley) is enhanced to every 30 minutes during Monday to Friday daytimes (the service remains at every 60 minutes on Saturdays), and as a consequence of this service W1 (Hedge End to Fareham) is diverted to run via Whiteley Way instead of via Parkway, except for certain journeys in the peak periods.

Phase 4

2.6.37 The introduction of further enhanced services in Phase 4 is coincident with the occupation of the 2,000th dwelling in North Whiteley, or the opening of the full length of Whiteley Way and Curbridge Way, whichever is later. Once Whiteley Way is completed in full, it is proposed to re-route the service from Curbridge Way to Whiteley Way to serve the northern local centre. The key characteristics of the Phase 4 service provision will be as follows:

- Service W1 between Hedge End and Fareham is re-routed with some limited-stop elements and a new, faster route between Whiteley and Segensworth;
- The North Whiteley to Warsash W2 service is significantly amended with a revised route in the Whiteley area and is extended to operate through to the Segensworth industrial area;
- Service frequencies on the key corridor through North Whiteley are increased;

- Frequency of service between Whiteley and Swanwick is unaltered.

2.6.38 The revised service W1 between Hedge End and Fareham will be increased in frequency to every 20 minutes during Monday to Saturday daytimes and every 30 minutes in the evenings and on Sundays. During Monday to Saturday daytimes, the route will operate direct between Whiteley Centre and Segensworth industrial area via M27 Junction 9, reducing journey times between Whiteley Centre and Fareham to 23 minutes off-peak Evening and Sunday services will continue to operate via Swanwick and Park Gate.

2.6.39 Within Segensworth, buses will continue to serve either Segensworth Road or Brunel Way, with preference for Segensworth Road where there is an imbalance of frequency.

2.6.40 Service W2 will be significantly amended to take account of the revised service W1 and to accommodate the journeys to other areas that cannot be made on this service. The section of route between Warsash and Whiteley will remain as Phase 3, but will then be extended to Segensworth via Park Gate to provide additional services to this area and also establish a new direct link between Warsash, Locks Heath and Segensworth.

2.6.41 The route will operate in both directions along the A3051 between Park Gate and Swanwick, effectively creating a two-way loop around Whiteley and North Whiteley. Two buses per hour will operate towards Warsash in an anti-clockwise direction around Whiteley, North Whiteley and Burridge, with Segensworth-bound services operating in the clockwise direction. To aid recognition in the Whiteley area, services towards Warsash will be numbered W2A and towards Segensworth as W2C.

2.6.42 The connection between North Whiteley and Swanwick station will remain at four buses per hour, but this will be provided wholly by service W2 as service W1 will operate directly via M27 Junction 9. Buses in both directions combine for a broadly even headway between North Whiteley and Swanwick, although signage and information will need to be clear to enable prospective passengers to wait at the correct stop.

2.6.43 This package of services provides the North Whiteley area with the following connections in Phase 4:

Service	Route	Frequency	
		Mon – Sat	Eve & Sun
W1	Fareham – Segensworth – Whiteley – North Whiteley – Botley – Hedge End	20 mins	30 mins (via Swanwick)
W2A/C	Warsash – Locks Heath – Park Gate – Swanwick – Burridge – North Whiteley – Whiteley – Swanwick – Segensworth	30 mins	No service

Table 2.9 Phase 4 Bus Service Package

2.6.44 At this stage of the development, the frequency on service W1 has been increased to every 20 minutes to cater for the increasing demand of residents in North Whiteley and the other growth expected on services operating to the major employment areas as a result of the improved provision. On service W2, a frequency of every 30 minutes is now provided during Monday to Saturday daytimes.

2.6.45 In the evenings and on Sundays, service W1 will operate an amended service which will operate every 30 minutes between Hedge End and Fareham but will operate via Yew Tree

Drive, Swanwick station and Park Gate between Whiteley and Segensworth. These services will operate directly via Segensworth Road in the Segensworth industrial area.

Education Contract Services

2.6.46 The development will generate a significant number of primary-age schoolchildren. In the initial phases of the development, these pupils will require transport to their schools prior to the opening of the new schools on the site.

2.6.47 In developing proposals the likely numbers of students travelling from each area of the emerging site has been taken into account. The following profile of transport requirements for primary-age pupils has been developed:

Year	Education transport required
1	1 midibus from all sites to temporary school
2	1 minibus from western site to temporary school 1 coach from south eastern sites to temporary school
3	1 midibus from western site to new school
4 onwards	No requirement for primary school transport

Table 2.10 Transport Requirement for Primary-age pupils

2.6.48 A temporary school, Cornerstone Church of England Primary School, which is located off Bader Way, is expected to be in operation for the first few years of the development. Pupils will transfer directly to the new primary school when it becomes operational. As the number of schoolchildren increases, the vehicles which are required to carry them to school will also increase in size. The south eastern sites will become within walking distance of the first primary school, which means that their requirement for transport will cease earlier.

2.6.49 For safeguarding reasons these services will be dedicated “closed door” contract services which will not be available to the general public.

2.6.50 It is recognised that, prior to the opening of the secondary school on site, pupils will require transport to the nearest alternative school and that provision will need to be maintained for the entire period of those students attending the alternative school.

2.6.51 Further discussions are required with HCC to determine the available capacity of the existing service provision from Whiteley. Should additional capacity be required, bus provision could be made for students to travel to Henry Cort School in Fareham to complement existing services from the Whiteley area, and an appropriate financial contribution could be made for the operation of these services.

2.6.52 Once public transport services are available between the development and Fareham (Phase 2), provision can be made by a diversion of these new services at the appropriate times until such time that the on-site Secondary School is open.

Infrastructure

2.6.53 Whilst high quality bus services are integral to the success of the development, a similar quality of infrastructure provision will be vital in attracting users to the service. The provision of a number of types of infrastructure will be provided including:

- High quality bus stops;
- Bus priority measures such as priority control at signalised junctions; and
- Off-site enhancements that are designed to improve the flow of buses or enable passengers to access facilities.

2.6.54 Bus stops situated within the development will be equipped with the following:

- A high quality, 3 sided shelter;
- Seating and lighting;
- Comprehensive timetable information, with the potential for including network maps and fare details;
- A flag indicating services calling at the stop;
- Real Time Passenger Information (RTPI) screens indicating departure times of the next bus;
- A raised kerb to allow the less mobile or those with pushchairs to access the bus easily;
- Cycle stands to allow cycle-bus interchange, where appropriate; and
- 'Bus stop' cage markings and an associated clearway order to keep bus stops free of other parked vehicles.

2.6.55 Provision of these facilities and their prompt maintenance and repair will ensure that the point of access to bus services is kept to a high standard and will act as an attractor to public transport services within the development.

2.6.56 Eight pairs of bus stops on the development site will allow access to bus services for the majority of residents of North Whiteley within 400 metres. Three of these will need to be provided in Phase 1, with two more added to serve the central and western areas of the site in Phase 2. The remaining three pairs located on Whiteley Way will be introduced in Phase 3.

2.6.57 Off-site enhancements that will provide benefits to the site and will therefore be provided by the North Whiteley Consortium include:

- Improvements to bus stops along the proposed service routes within Whiteley, Solent Business Park, Hedge End, Botley village, by Botley and Swanwick railway stations and in Segensworth;
- A southbound bus lane along Whiteley Way to provide priority to the:
  - Whiteley Way / Whiteley Town Centre access junction;
  - Whiteley Way / Marjoram Way / Whiteley Town Centre Access junction;
  - Whiteley Way / Parkway junction;
  - Whiteley Way / Rookery Avenue / Parkway junction; and
  - M27 Junction 9, Park Gate.

2.6.58 The package has been designed to serve demand generated by the development site in an efficient and effective manner while providing an attractive and high quality transport offer.

Parking Strategy

Residential Parking

2.6.59 Residential vehicle parking at the North Whiteley development will be provided based on Winchester City Council's Supplementary Planning Document (SPD) 'Residential Parking Standards' (December 2009) which states that parking should be provided as set out within Table 2.11 below. Parking standards are provided for shared / communal spaces and allocated parking. A figure of 20% is stated for visitor parking in areas of allocated parking with no shared / communal offering and so this figure has been added to the allocated parking standards within the table below.

Unit Type	Shared / Communal Parking Spaces Per Unit	Allocated Parking Spaces Per Unit	Allocated Parking Spaces + Visitor spaces Per Unit
1 bed	1	1.5	1.8
2 bed	1.5	2	2.4
3 bed	2	2	2.4
4+ bed	2.5	3	3.6

Table 2.11 Winchester District Council's Residential Vehicle Parking Standards

2.6.60 The development will provide up to 3,500 residential dwellings. This will be a mixture of private and affordable housing and the indicative likely mix of unit types is set out within Table 2.12. The development will have a diverse mix of parking types dependant on location and dwelling type that will consist of either allocated parking in the form of drive-ways, garage parking and allocated parking areas or communal / shared parking that will be provided on-street and within communal parking courtyards.

2.6.61 Due to the outline nature of the application the exact locations and quantity of the different parking types is not yet known and therefore the parking standards have been used to calculate the minimum number of spaces that will be available, if all the parking is shared or communal (7,263) and the maximum number of spaces if all of the parking is allocated with visitor spaces (10,080). In reality the exact number of parking spaces at the development will sit somewhere between these two figures depending on the makeup of the parking areas.

2.6.62 The exact quantity of parking provided can be dealt with on a plot by plot basis at the time of submitting detailed applications. The estimated number of parking spaces required is set out within Table 2.12:

Unit Type	Number of Units	Shared / Communal Parking Spaces Per Unit	Total Shared / Communal Parking Spaces	Allocated Parking Spaces Per Unit	Total Allocated Parking Spaces	Allocated Parking Spaces + Visitor Spaces Per Unit	Total Allocated Parking + Visitor Spaces
2 bed (25%)	875	1.5	1,313	2	1,750	2.4	2,100

3 bed (35%)	1,225	2	2,450	2	2,450	2.4	2,940
4 bed (35%)	1,225	2.5	3,063	3	3,675	3.6	4,410
5+ bed (5%)	175	2.5	438	3	525	3.6	630
Total	**3,500**		**7,263**		**8,400**		**10,080**

Table 2.12 Proposed Residential Mix and Associated Vehicle Parking

2.6.63 Where garages are provided they will be constructed to at least a size of 6m x 3m to ensure that there is space within the garage for storage, such as bikes and to allow a car to be parked at the same time.

2.6.64 Cycle Parking will also be provided within the residential areas of the development and also to the standards set out within Winchester's SPD and replicated in Table 2.13 below.

Unit Type	Long Stay Cycle Parking Standards	Short Stay Cycle Parking Standards
1 bed	1	1
2 bed	2	1
3 bed	2	1
4+ bed	2	1

Table 2.13 Winchester District Council's Residential Cycle Parking Standards

2.6.65 Long term cycle parking will be provided within garages and other designated covered and secure cycle storage facilities within the development such as cycle lockers in the case of flats and garden sheds with secure locking facilities in the case of houses. Short term parking will be provided in the form of on-street Sheffield Stand style cycle parking. Table 2.14 below sets out the number of cycle spaces that will be required for the residential element of the development.

Unit Type	Number of Units	Long Stay Cycle Spaces Per Unit	Long Stay Cycle Spaces	Short Stay Cycle Spaces Per Unit	Short Stay Cycle Spaces
2 bed (25%)	875	1	875	1	875
3 bed (35%)	1,225	2	2,450	1	1,225
4 bed (35%)	1,225	2	2,450	1	1,225
5+ bed (5%)	175	2	350	1	175
Total	**3,500**		**6,125**		**3,500**

Table 2.14 Proposed Residential Mix and Associated Cycle Parking

On-Site School Parking

2.6.66 On-site parking for each of the schools will be provided based on the parking standards set out within HCC's document 'On-Site School Parking Guidelines' (April 2013), the standards for which are set out within Table 2.15 below.

Type	Recommended Parking Standard
Cars	1 space per teaching member of staff; plus 2 spaces per 3 non-teaching members of staff. Disabled parking should be provided at 5% of the above allocation
Powered Two-Wheelers	Minimum of 1 space or 1 space per 25 car spaces
Bicycles	Primary Schools: 1 cycle space per 20 pupils Secondary Schools: 1 space per 10 pupils All Schools: 1 space per 20 staff in a non-pupil area
Scooters	Primary Schools: 1 space per 10 pupils

Table 2.15 On-site school parking standards

2.6.67 In order to calculate the number of pupils and staff at each of the schools at North Whiteley the data for a number of similar schools in Hampshire was collected broken down by school type, number of form entry and staff type. This information was then used to calculate the number of spaces required for each of the modes above as set out within Table 2.16 below.

2.6.68 It should be noted that at the time of writing it is proposed that the primary school in the southern half of the site is proposed to be 3 form entry and the primary school in the northern half of the site will be 2 form entry with an option to extend to 3 forms, if necessary. On-site car parking at the northern site will therefore be provided as required for a 2 form entry school with space to expand as necessary.

	On Site Car Spaces	Powered Two Wheelers	Bicycles - Staff	Bicycles - Pupils	Scooters
2FE Primary School	29 (1 disabled)	1	2	21	41
3FE Primary School	42 (2 disabled)	2	2	30	60
9FE Secondary School	116 (6 disabled)	5	6	136	-

Table 2.16 On-Site School Parking Requirements

Off-Site School Drop-off and Pick Up Parking

2.6.69 It was agreed with HCC that sufficient off-site parking should be provided to allow pupils to be dropped off and picked up within 400m of the schools without any safety or capacity issues on the local road network with people parking inappropriately. It was therefore agreed that the number of people dropping off or picking up pupils should be calculated and parking provided on street or in the case of the primary schools partly within the local centre parking allocations.

2.6.70 Drop-off and pick up parking has therefore been calculated, and agreed with HCC.

2.6.71 From this the number of off-site car drop-off and pick up spaces was determined, as set out within Table 2.17.

School Type	Drop-off / Pick up parking requirement
2 FE Primary	47
3 FE Primary	53
9 FE Secondary	74

Table 2.17 Requirement for off-site school drop-off and pick up parking

2.6.72 This level of parking has been incorporated into the design of the main streets (Whiteley Way and Bluebell Way) within 400m of each of the schools. It should be noted that parking for the primary schools has in part been incorporated into the local centre parking areas and that the requirement for parking for a 3 form entry primary school has been taken for both primary schools to ensure that any future expansion at the Northern school is accounted for.

Local Centre Parking

2.6.73 The parking is considered for the following local centre uses in the Northern Section of the site:

- 362m^2 Convenience Store;
- 512m^2 A1 commercial units (4 units);
- 650m^2 Community Building;
- 432m^2 Nursery;
- Off-site drop-off and pick up parking for the 3 form entry primary school.

2.6.74 The parking is considered for the following uses in the Southern Local Centre:

- 250m^2 A1 commercial units (2 units);
- 450m^2 Nursery;
- Off-site drop-off and pick up parking for the 3 form entry primary school.

2.6.75 Table 2.18 summarises the parking required at each of the local centres and the location of the parking within the masterplan.

Table 9: A Review of Masterplan Parking Provision	Spaces on Masterplan	Spaces Required	Difference
Northern Local Centre			
Local Centre (inc Community Building and staff)	43	71	+1
On-street within 400m	29		
Total	**72**		
Southern Local Centre			
Local Centre	38	61	+5
On-street within 400m	28		
Total	**66**		

Table 2.18 Local Centre Parking Requirements

2.6.76 Cycle parking at the local centres has also been designed based on HCC's 2002 Parking Standards as set out within Table 2.19 below.

Type	Recommended Parking Standard	
Retail Units / Convenience Store	1 per 300m^2; OR 1 per 6 staff. (Whichever is greater)	1 per 200m^2
Community Building	1 per 40m^2; OR 1 per 6 staff. (Whichever is greater)	1 per 20m^2
Nursery	1 per 6 staff	2 spaces (min)

Table 2.19 Local Centre Cycle Parking Standards

2.6.77 On this basis Table 2.20 below sets out the number of spaces that will be provided at each of the local centres. The number of staff likely to work at each of the Local Centre elements has been calculated based on the average number of staff working at similar sites within the TRICS database.

	Size (m^2)	Staff	Long Stay (Based on Size)	Long Stay (Based on Staff)	Long Stay Requirement	Short Stay Requirement
Retail Units	512	30	2	5	5	3
Convenience Store	362	21	1	4	4	2
Nursery	432	21	0	5	5	2
Community Building	650	5	16	1	16	33
Total	-	-	-	-	30	39
Retail Units	250	14	1	2	2	1
Nursery	450	22	0	6	6	2
Total	-	-	-	-	8	3

Table 2.20 Local Centre Cycle Parking Requirements

Extra Care Home

2.6.78 It is understood that the masterplan has been designed to accommodate an Extra Care Home, as part of the northern local centre, should this be required.

2.6.79 On this basis, parking for the potential extra care home has been provided in line with HCC's 2002 Parking Standards as set out within Table 2.21 below. The number of staff likely to be working at the extra care home has been calculated based on the average number of staff working at similar sites within the TRICS database. Two part-time staff have been considered to be equivalent to 1 full time member of staff or the purposes of calculating parking spaces.

Type	Recommended Parking Standard
Cars	1 space per 8 residents; plus 0.5 spaces per member of staff. Disabled parking should be provided at 5% of the above allocation
Bicycles	Long stay: 1 space per 6 staff Short term: 1 space per 2 units

Table 2.21 Extra Care Home parking standards

2.6.80 It is proposed that the extra care home will have a maximum of 80 beds and therefore the number of spaces as set out within Table 2.22 will be provided at the care home.

	Residents	Staff	Car Spaces	Bicycles – Long term	Bicycles – Short Term
80 bed extra home	80	52	36 (2 disabled)	9	40

Table 2.22 Extra Care Home Parking Requirements

2.7 Travel Plan

2.7.1 In support of the proposed North Whiteley development, a Framework Travel Plan (FTP) has been produced in close consultation with HCC and the HA. The key aim of the Framework Travel Plan is to:

"Reduce single occupancy car trips associated with the development by promoting more sustainable alternatives to the car, including car sharing, public transport and walking and cycling."

2.7.2 This objective will be achieved through a combination of measures aimed at discouraging single occupancy car use and facilitating the use of alternative modes of transport.

2.7.3 As with all other Travel Plans, the Framework Travel Plan for North Whiteley is site specific with the choice of measures partly determined by the existing opportunities and constraints offered by the site.

2.7.4 This Framework Travel Plan includes the delivery of 'soft measures' such as marketing and awareness arising as a result of the Travel Plan package to further encourage travel by sustainable modes. The Framework Travel Plan also acknowledges the important role of hard (physical) measures such as site design, infrastructure provision and enhanced bus services to be delivered as part of the proposals.

2.7.5 The specified measures have been tailored to provide a holistic package in which individual measures are integrated into the design, marketing and occupation of the site rather than being 'retrofitted' once the development is established. The measures therefore aim to achieve more sustainable travel patterns from the outset in order to take advantage of the fact that travel behaviour change is more likely to happen when other life changes (such as moving house) are occurring.

2.7.6 The main objectives of the North Whiteley Framework Travel Plan are to:

- Reduce the need for unnecessary travel to and from the development and assist those who need to travel to do so by sustainable modes;

- Reduce the traffic generated by the development to a lower level of car trips than would be predicted for the site without the implementation of the travel plan in order to minimize the traffic impact on the local highway network;
- Encourage those travelling to and from the development and wider Whiteley area to use public transport, cycle or walk in a safe and secure manner; and
- Promote healthy lifestyles and sustainable, vibrant local communities by extending the benefits of the Travel Plan through the local area, where possible.

2.7.7 The development of a Travel Plan has a number of benefits for future residents, employees, pupils, parents and visitors, as well as the existing local community and surrounding environment.

Residents, Employees, Pupils, Parents and Visitors

- Improved health and fitness through increased levels of walking and cycling;
- Increased travel flexibility offered through wider travel choices;
- The social aspects of sharing transport with others; and
- A good environment within the site and its immediate environment as vehicular movements are minimised.

Retail/Commercial, School and Community Facilities - Occupier Benefits

- The Travel Plan will increase staff satisfaction and benefit staff retention by improving ease of travel to work and by providing associated travel related staff benefits;
- It will also play a positive role in staff recruitment due to the creation of a larger potential labour pool and the ability to recruit workers without access to travel by private car; and
- A Travel Plan can contribute to improved staff and pupil health and wellbeing and reduced absenteeism.

Retail/Commercial, School and Community Facilities – Staff Benefits

- The Travel Plan will help reduce the cost of travel to work for staff and may, for certain staff, bring about savings in travel time by offering a wider choice of travel modes;
- Staff will benefit from a healthier lifestyle through improved opportunities to build exercise into their daily routine. A wider choice of modes of transport for travel to work can also help to reduce stress levels amongst staff; and
- The Travel Plan will provide greater convenience to staff in terms of travel choice and information availability.

Local Community and Environment

2.7.8 The sustainable transport strategy for the development and the infrastructure proposed will benefit existing residents/ employees in the Whiteley / Swanwick area in a number of ways. One of these is the benefit received from area wide travel plan measures such as Personalised Travel Planning.

2.7.9 The potential benefits to the environment, compared to the "without Travel Plan" scenario, are as follows:

- The impact of the development on the local environment will be lessened, in terms of reducing congestion, noise and atmospheric pollution created by vehicle trips to and from the site; and
- A reduction in vehicular movements to and from the site will reduce pollution levels and contribute to a reduction in vehicular turning movements to/from the site. This will contribute to both local air quality management and national climate change reduction targets.

2.7.10 Overall, it is anticipated that the Travel Plan, combined with the package of infrastructure measures designed to promote sustainable transport, will result in benefits for residents of the site and the wider community in the vicinity of the development.

Overall Conclusion of the Traffic Assessment

2.7.11 A comprehensive Transport Assessment has been undertaken of the transport impacts arising from the proposed development at North Whiteley. The TA identifies a package of transport measures aimed at encouraging sustainable transport modes, provides safe and suitable access to the site for all modes, and identifies the improvements and mitigation measures that can be undertaken within the transport network that cost effectively limits the significant impacts of the development.

2.8 Benefits of Delivering North Whiteley

2.8.1 The previous section set out the current transport issues in the Whiteley and surrounding areas. It also set out how these will be dealt with within the proposed North Whitely scheme development and the improvements and benefits that would be generated. These are in addition to the two key benefits generated by North Whiteley, i.e. a significant contribution to the housing target of 12,500 houses by 2031, as well as an increase in the supply of more affordable housing. However, the development will also provide a number of other benefits in line with local policy objectives and these are discussed below.

2.8.2 The vision and the development principles for the new community at North Whiteley were derived through a collaborative process. A range of statutory bodies, technical stakeholders and representatives from the local community attended a workshop in November 2009 and decided that:

"North Whiteley will be a development which celebrates the magnificent richness of the existing landscape and serves to rebalance the community to appeal to a broader cross section of the population, allowing residents to fulfil their day-to-day needs in an environmentally conscious way."

2.8.3 Delivering this vision would have future benefits for the existing and new residents of Whiteley by creating a relatively self-contained community, providing key local facilities and new schools within easy walking distance of new and existing homes and promoting sustainable and active travel and lifestyles. The benefits have been grouped as follows[13]:

- Connected communities;
- Well served communities;

[13] Appendix 1 to Issues 6 (SH3), North Whiteley Delivering Sustainable Communities, October 2012, North Whiteley Consortium

- Healthy communities;
- Inclusive communities;
- Environmentally sensitive communities; and
- Environmentally responsible communities.

Connected Communities

2.8.4 The masterplan for North Whiteley has been designed to create well-connected and walkable neighbourhoods and allow new residents to carry out their day-to-day activities without having to rely on private vehicles. Most of the new local centres and schools and the existing Whiteley town centre will be within easy walking and cycling distance and linked through an inclusive network of safe footpaths and cycle ways. The footpath and cycle network will also extend into the surrounding areas, to Botley and Swanwick Railway Stations and to Segensworth across Junction 9 of the M27. Therefore, there will be opportunities for local journeys to be made in a healthy and sustainable way and along and through the network of tree belts and natural open spaces.

2.8.5 Public transport will be improved through provision of new bus services, more frequent and of better quality, linking to the existing Whiteley area, Botley and Swanwick Rail Stations, employment areas at Solent and Segensworth Business Parks and the wider destinations at Locks Heath, Warsash, Fareham, Botley and Hedge End.

Well Served Communities

2.8.6 Some 350 children a day were being driven out of the village to schools in Fareham because the existing three-form entry primary in Whiteley was massively oversubscribed. A new temporary primary school providing places for 210 pupils opened in September last year, after long term efforts of parents and campaigners to secure a new school. However, this is only a provisional solution since the location is not ideal and it has raised residents' concerns about parents driving to school and causing increased congestion and parking problems on narrow roads.

2.8.7 The new development will address this issue and the temporary school will transfer to new permanent buildings in North Whiteley. Moreover, the provision of an additional primary school and a new secondary school will make good any remaining shortfalls in school places. The secondary school will act as a community school offering complementary facilities for use by the entire community such as a gym, adult learning facilities, a youth club, sports centre and library.

2.8.8 North Whiteley is strategically positioned to provide local housing for the significant employment areas at Solent and Segensworth Business Parks. Additional employment opportunities will be created as part of the two new neighbourhoods at North Whiteley associated with the new schools, retail and leisure centre.

Healthy Communities

2.8.9 North Whiteley will create opportunities for a vibrant community, with plenty of new amenities and services to serve the needs of new residents and encourage community interaction. An exciting array of outdoor spaces such as playing fields, a cricket green, community orchards, allotments and the woodland area within easy reach from residents' homes will allow them to have a healthy lifestyle and foster a sense of community.

2.8.10 In addition, a dedicated community development officer will actively encourage the formation of local teams and will support residents who wish to start their own societies and groups. The

officer will also work with new and existing residents to promote the use of the facilities provided and to assist community cohesion.

Inclusive Communities

2.8.11 The new neighbourhoods of North Whiteley will be designed to create a distinctive sense of place of which residents can be proud. The northern neighbourhood will be lower density and reflect the character of a Hampshire market town while the southern neighbourhood will respond to its proximity to the existing Whiteley urban area and its improved town centre. Both neighbourhoods will comprise a mix of housing types and tenures aimed to address the housing needs of the area (including much needed affordable housing) and at the same time tied in with surrounding settlements to create a place that fits. The masterplan promotes safe places and makes a clear distinction between the public and private realm to avoid 'dead' and isolated areas.

Environmentally Sensitive Communities

2.8.12 The masterplan for North Whiteley was designed to respect the surrounding landscape of woodlands, tree belts and hedgerows that will be retained and dictate the resulting street pattern for the new neighbourhoods. Great care has been taken to avoid and mitigate any potential impacts on River Hamble, Botley Wood and Everett's and Mushes SSSI and make appropriate use of Sites of Importance for Nature Conservation on site. Ecological surveys have helped inform the strategy for minimising ecological impact on site, allowing the maintenance of wildlife corridors and the creation of new habitats.

Environmentally Responsible Communities

2.8.13 The development at North Whiteley aims to deliver a number of important environmental benefits to the local community. Firstly, new homes will be equipped with energy efficient solutions and the scheme will work towards the Government's commitment to zero carbon homes. Secondly, the master plan was designed to mitigate the risk of flooding both on site and to the adjacent communities. Lastly, the transport strategy for the area aims to reduce the need to travel and encourage more active and sustainable travel, especially for residents who choose to work within the Whiteley area. Reducing reliance on the car has global, local and individual benefits related to reduced pollution and congestion.

2.9 Fit with Policy Objectives

2.9.1 As part of the strategic business case it is important to undertake an evaluation of relevant policies to ensure proposals fit with established plans. This section of the report explains how the scheme aligns with the vision, objectives and/or requirements of national, regional and local relevant policy documents. It begins by demonstrating evidence of the linkages between the proposed scheme and housing objectives / policies and then provides a similar exercise focussing on transport.

Housing Objectives

National Planning Policy Framework (2012)

2.9.2 Policy SH3 as set out in the Local Plan Part 1 is compliant with the National Planning Policy Framework (NPPF) published in March 2012, both in terms of the collaborative process by which the policy was developed and its content.

2.9.3 Policy SH3 aims to meet locally identified needs and development aspirations of the PUSH (Partnership for Urban South Hampshire) area in terms of both housing and infrastructure provision with sufficient flexibility to allow for changing needs and circumstances. This is in line

with the presumption in favour of sustainable development that sits at the heart of NPPF. Paragraph 14 in the NPPF explains what this means for plan-making, by stating the following:

- *"Local planning authorities should positively seek opportunities to meet the development needs of their area;*
- *Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change."*

2.9.4 An evidence-based approach is recommended by NPPF when assessing the appropriate level of housing developments. This should take into consideration several factors, including economic, social and environmental characteristics and prospects of the area. Paragraph 159 emphasises that local authorities should:

- *"Prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment 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);*
  - *caters for housing demand and the scale of housing supply necessary to meet this demand;*
- *Prepare a Strategic Housing Land Availability Assessment to establish realistic assumptions about the availability, suitability and the likely economic viability of land to meet the identified need for housing over the plan period."*

2.9.5 In line with the above recommendations, Winchester City Council prepared the Winchester Housing Market and Housing Need Assessment (2012 Update) and the Strategic Housing Land Availability Assessment (2013) which represent two of the strategic evidence sources in relation to the housing target derived.

2.9.6 Paragraph 165 indicates that a strategic environmental assessment should be an integral part of the plan preparation process. This was undertaken when testing different development options for expanding Whiteley. Three options (i.e. the two land areas that now make up the proposed strategic allocation to the north and a separate site to the east of the settlement) were evaluated as part of a workshop in January 2008 against a set of sustainability criteria and were also the subject of a Sustainability Appraisal[14]. The Preferred Option[15] was to merge the two areas to the north and form a Strategic Allocation for around 3,500 dwellings.

2.9.7 The housing development at Whiteley is also in accordance with section 6 of NPPF since it aims to provide a wide choice of high quality homes, including affordable housing, while minimising impacts on biodiversity and providing net gains wherever possible. The development has been designed as an extension of the current Whiteley settlement and the

[14] Winchester Local Development Framework Sustainability Appraisal (SA) & Strategic Environmental Assessment (SEA), Sustainability Appraisal of Core Strategy Issues and Options, April 2008, Enfusion

[15] Winchester District Development Framework, Core Strategy Preferred Option, May 2009, Winchester City Council

existing woodlands adjoining the site is intended to create attractive neighbourhoods with a distinctive sylvan character. This is in accordance with paragraph 52 of NPPF which makes the point that:

"The supply of new homes can sometimes be best achieved through planning for larger scale development, such as new settlements or extensions to existing villages and towns that follow the principles of Garden Cities. Working with the support of their communities, local planning authorities should consider whether such opportunities provide the best way of achieving sustainable development. In doing so, they should consider whether it is appropriate to establish Green Belt around or adjoining any such new development."

2.9.8 Lastly, Paragraph 112 of the NPPF instructs that local planning authorities should seek to avoid the loss of the best and most versatile agricultural land. However, whilst there are areas of high quality agricultural land present on the selected site, the other environmental and social benefits of providing housing on this site were considered to outweigh the loss.

Regional and Local Policy

Transforming Solent – Growth Strategy (October 2014)

Transforming Solent is the Growth Strategy developed by Solent Local Enterprise Partnership (LEP) and summarises their Strategic Economic Plan for the period 2014 – 2020. The Strategy sets out ambitious targets intended to unlock £1.51[16] billion in investment for the Solent area in the next six years. This is expected to deliver jobs and growth through six enabling strategic priorities:

- Support new businesses, enterprise and ensure SME survival and growth;
- Enable infrastructure priorities including land assets, transport and housing;
- Establish a single inward investment model to encourage companies to open new sites;
- Invest in skills to establish a sustainable pattern of growth, to the benefit of local residents;
- Develop strategic sectors and clusters of marine, aerospace and defence, advanced manufacturing, engineering, transport and logistics businesses, low carbon, digital and creative and the visitor economy;
- Building on our substantial knowledge assets to support innovation and build innovative capacity.

2.9.9 The Local Growth Deal is one of the investment proposals put forward by the Growth strategy and consists of a £124.8 million package of government funding that will be used to leverage additional investment from the private sector, developers and other local partners of £360 million. The key to delivering the investment secured by the deal is a number of significant projects focused on three key areas:

- Enabling flagship sites for housing and employment;
- Enhancing transport connectivity across the area;
- Growing the skills base and supporting business growth.

[16] Based on City Deal, the EU SIF and the Local Growth Deal

2.9.10 The £14 million transport package for North Whiteley is one of the priorities for action for unlocking strategic sites for housing and employment. It will provide a major new transport link to the existing highway access in the area that will support the current community and the development of 3,500 new homes. It was estimated that it will create 500 new jobs and stimulate further investment.

Transforming Solent - Solent Strategic Economic Plan 2014-20 (March 2013)

2.9.11 Transforming Solent is the Strategic Economic Plan developed by Solent Local Enterprise Partnership (LEP). It sets out a plan for growth in the area in the period up to 2020. The plan builds on the success of the City Deal and the founding vision of the LEP, with more ambitious targets aimed at focusing investment on economic sectors that need to develop the most to accelerate growth.

2.9.12 North Whiteley is identified as a key site for housing and employment in the Solent:

"The North Whiteley Strategic Development is included in the Winchester City Council Local Plan Part 1. It is a strategic growth area which will provide 3,500 new homes and associated infrastructure. Support is required for a major new transport link serving both the proposed growth area and the existing community of Whiteley which at present has only one main highway access onto the M27. Deliver this important piece of infrastructure which will help to unlock this key growth area."

2.9.13 The Solent SEP emphasises the main reasons for the need for a growth plan in the area and for focused and strategic interventions such as the North Whiteley development. Firstly, lack of investment in sustainable, integrated transport will have a negative impact on jobs and growth. The Solent is forecast to experience increasing levels of congestion. This is not surprising given the high level of urbanisation, the presence of two large cities in the region (Portsmouth and Southampton) and three International Gateways (Port of Southampton, Port of Portsmouth and Southampton International Airport) that connect the UK with global markets. Increased congestion can restrict future job creation, lead to a decline in retention of existing employment and affect the competitiveness and productivity of businesses in the area. In addition, it has a negative effect on air quality and implicitly on public health.

2.9.14 Secondly, a lack of space for expansion and development will continue to pose a constraint to the growth of businesses and provision of new homes. Strategic sites such as the one at North Whiteley will not be able to be developed, preventing the delivery of 3,500 new homes, employment space and other community facilities. This would undermine the Solent LEP/PUSH housing strategy and leave the shortfall of housing in the Solent unresolved. Moreover, it would fail to attract skilled workforce to the area and create an exciting and rewarding place to live and work. This is of crucial importance given the current higher skills deficit in the Solent.

2.9.15 Thirdly, significant areas of land including existing homes and businesses are facing real risk of flood damage. The risk is also acting as a barrier to opening up new sites for development and regeneration, employment land and houses and attracting new private sector investment. In the absence of the interventions included in the Solent SEP, these areas of land will not be available for development.

2.9.16 Lastly, projected demographic changes and replacement demand represent a real challenge for the labour market and will impede growth in the Solent. Poor education attainment and the lack of STEM (science, technology, engineering and mathematics) skills will have a negative impact on the development of key growth sectors in the area such as manufacturing and the marine and the marine and maritime sectors. Without the growth deal investment, it will not be possible to generate new capacity and capability to nurture these necessary skills.

2.9.17 Consequently, the Strategic Development area at North Whiteley will contribute to the Solent SEP Strategic Priorities by:

- Delivering infrastructure priorities by providing significant transport enhancements and 3,500 new homes of a wide range of sizes including a proportion of affordable housing;

- Providing a new resident population with wide-ranging skills and abilities, thus helping support the 'skills for growth' priority;

- Helping to deliver inward investment by providing housing, infrastructure and facilities adjacent to the Solent Business Park and other nearby centres of employment.

Winchester District Local Plan Part 1 Joint Core Strategy (March 2013)

2.9.18 In 2004 the Government introduced a new local planning policy document called the Local Development Framework (LDF) to replace local plans. The City Council started preparing its key LDF document under the heading of the LDF Core Strategy during 2007 and formally adopted it on 20 March 2013. The Core Strategy sets out the vision, planning objectives, development strategy and core policies for planning in Winchester District for the period from 2011 to 2031.

2.9.19 The Core Strategy is set out in two parts - The Spatial Strategy and Core Policies. The Spatial Strategy divides the District into three areas, Winchester Town, South Hampshire Urban Areas, and the Market Towns and Rural Area, each with a vision and set of policies which reflect their nature and characteristics, and opportunities for growth and change.

2.9.20 The North Whiteley site, located in South Hampshire Urban Area, is recognised in the Core Strategy as providing an opportunity to secure important infrastructure and community facilities, and to locate new residential development close to major employment areas. The development of Whiteley is part of the overall spatial planning vision as outlined below:

"Winchester District is a special place characterised by a rich historical and cultural heritage and attractive countryside and is home to a diverse population and a variety of business sectors. The District should retain the distinctive characteristics of the three key areas so as to maximise opportunities to address change in a positive way that ensures it remains an attractive place to live, visit, work and do business:

- *the County Town of Winchester needs to meet its housing and community requirements and to diversify its economy through the promotion of the knowledge, tourism, creative and education sectors, whilst respecting the highly valued features and setting of the Town;*

- *areas at Waterlooville and Whiteley on the southern fringes of the District need to provide homes, jobs, physical and social infrastructure whilst creating a strong sense of community identity and protecting nearby environmentally sensitive sites, to create extended communities in this part of South Hampshire;*

- *the market towns and many villages that fall within the rural area are to remain viable settlements offering where possible a range of local services and facilities, and be allowed to grow to respond to local needs, whilst retaining their individual identity and rural character. Development in those settlements that lie in the South Downs National Park should respect its purposes".*

2.9.21 The site is specifically referenced in 'Policy SH3 Strategic Housing Allocation – North Whiteley' which states:

"Land to the north of Whiteley is allocated for the development of about 3,500 dwellings together with supporting uses. The development should reflect Whiteley's predominantly wooded character and setting by maximising the opportunities presented by the substantial areas of green space within and adjoining the allocated area, which are either unsuitable for

built development or needed to mitigate potential impacts on protected sites. Development proposals should be accompanied by a comprehensive masterplan which includes an indicative layout and phasing plan, and sets out details of how this will be achieved.

The development should also complement and take advantage of facilities in the nearby town centre and major employment at the Solent Business Parks. It should accord with Policy DS1, in addition to the following site-specific requirements:

- *Protect and enhance the various environmentally sensitive areas within and around the site, avoiding harmful effects or providing mitigation as necessary. This will include any measures as necessary to mitigate the impact of noise and light pollution on the adjoining areas. The existing woodlands on and adjoining the site should be used to create attractive neighbourhoods with a distinctive sylvan character, improve biodiversity, provide recreational facilities including areas for children's play, and possibly be managed as a source of renewable energy (woodfuel);*

- *Provide for pre-school facilities, additional primary school places and a secondary school to accommodate the development, along with other physical and social infrastructure (as set out in Appendix E of the Infrastructure Delivery Summary), including provision, as required, for primary health care in the locality to serve the new community;*

- *Provide a comprehensive assessment of existing access difficulties affecting Whiteley, agree solutions prior to planning permission being granted, and incorporate specific proposals to ensure that these are implemented at an early stage of the development;*

- *Undertake a full Transport Assessment to ensure the package of mitigation measures are incorporated into the scheme, including pedestrian and cycle links, a public transport strategy and any offsite contributions as deemed necessary;*

- *Complete Whiteley Way at an early stage of development, in an environmentally sensitive manner which does not cause undue severance for the new community or encourage traffic from adjoining areas to use the new route to gain access to the strategic road network;*

- *Provide measures to ensure that smarter transport choices are made to achieve a modal shift which minimises car usage, manages the impact of private cars on the highway network, and implements measures necessary to accommodate additional traffic, to include improvements to junction 9 of the M27 to be agreed with the relevant highway authorities. These should improve Whiteley's level of self-containment and make a significant contribution towards reducing commuting levels;*

- *Avoid harmful impacts on water resources, given the proximity of the site to European sites of nature conservation interest. The development should provide a fully integrated Sustainable Drainage System to mitigate against any potential flood risk and apply a flood risk sequential approach to development across the site;*

- *Undertake a full assessment of the impact on habitats and biodiversity (especially those of national and international importance such as the River Hamble and the Solent) of development both on site and in combination with other nearby sites;*

- *Include a Green Infrastructure Strategy which sets out measures to avoid harmful impacts and mitigate the local and wider impacts of the development, including their phasing and long-term management. The strategy will also need to include any off-site measures required to mitigate harmful impacts on European sites;*

- *Assess the potential for prior extraction of minerals resources before development commences."*

2.9.22 The overall LDP vision is supported by a core set of objectives that have underpinned and guided its development. These objectives will be pursued through implementation of the LDP policies. The following objectives are specifically related to policy SH3:

"Active Communities

- *Maximise new and existing opportunities for walking, cycling, sport and recreation/play to promote healthy lifestyles for all members of the community;*
- *Provision of 12,500 new homes across the District by 2031;*
- *Provision of a range of housing types and tenures to address the varied housing needs of the District's resident and working population and ensure inclusion for all;*
- *Retention of existing and provision of new services and support facilities in the right places at the right time, including health, education, cultural, leisure and shopping, etc, to ensure existing and new communities are attractive and safe places to live and work and to allow our ageing population to participate;*
- *Encourage sustainable transport alternatives that reduce the use of the private car and enable people to live close to where they work or participate in activities.*

High Quality Environment

- *Maintain, protect and enhance Winchester District's valuable environments and wildlife assets, whether these are urban or rural areas or involve the built or natural environments. Ensure that change restores, maintains or enhances the biodiversity, landscape character and historic environment of the District as a special place, whilst respecting its setting within the South Downs National Park;*
- *Ensure that the status of the water environment (both ground and surface water systems) in the District is maintained and improved through the development strategy promoted;*
- *Provide, protect and enhance green infrastructure to include open spaces, green links and wildlife corridors;*
- *Ensure high quality design takes account of character, local distinctiveness and sustainable design principles."*

The South East Plan (May 2009)

2.9.23 The level of housing in Winchester's Local Plan was initially expected to conform with the regional strategy – i.e. South East Plan (SEP) (2009) – in accordance with the requirement in Planning Policy Statement 3 (PPS3) that regional strategies should set the level of housing provision for the region, for at least 15 years ahead, and break this into District requirements.

2.9.24 In 2012, the PPS3 was replaced by the National Planning Policy Framework (NPPF) and later, in 2013, the SEP was revoked by the Government. As a result, the City Council decided to take the opportunity to review its housing needs and to develop a locally-derived housing target and spatial distribution. Nevertheless, the Plan remains in 'general conformity' with the South East Plan, for the period covered by that Plan, whilst at the same time extending the Plan period to 2031.

2.9.25 The first key stage of the process of deriving a local housing target was the launch of 'Blueprint' in October 2010, an innovative public involvement exercise which encouraged local people, groups and communities to think about the future development needs and other needs for their communities. Overall the process was very well received, provoked a broad response and helped establish the priorities for the various spatial areas:

- Maintain vibrant and balanced communities;
- Sustain the local economy;
- Secure adequate and timely infrastructure provision;
- Provide family housing and/or more 2/3 bed housing;
- Make available more affordable / rented housing;
- Deliver housing for the elderly or sheltered housing;
- Retain and improve local facilities.

2.9.26 However, most respondents did not attempt to undertake a technical evaluation of housing needs in their community for the next 20 years. Only one respondent, Cala Homes (South) who appointed consultants Nathanial Lichfield and Partners (NLP), produced a technical assessment of housing needs which looked at several potential scenarios. Hence, it was necessary to quantify a District housing requirement. The **Housing Technical Paper (2011)** was therefore produced in order to do this and looked at various scenarios for population and housing change to 2031, as did the NLP paper:

- 'Government Projections' – developed by Hampshire County Council using the Office of National Statistics (ONS) 2008-based Sub-National Population projections (SNPP) which were applied to Winchester District housing and population data using the Chelmer model;
- 'Zero Net Migration' – also developed by Hampshire County Council using the Chelmer model but constrained in such a way that the net effect of migration is neutral;
- 'Economic-Based Projection' – a projection developed by NLP based on calculating the housing needed to cater for the job growth predicted within the Winchester Economic and Employment Land Study 2007;
- 'Affordable Housing-Led Projections' – also developed by NLP, this scenario sought to establish how much housing would be needed to generate the 375 affordable dwellings that the Strategic Housing Market Assessment update 2010 predicted was needed, assuming 30% or 40% of housing schemes would be required to be affordable.

2.9.27 This paper reaches the conclusion that the Government Projection scenario which suggests a figure of 11,000 dwellings should form the basis for the future level of housing development in Winchester District. The recommendations of this paper have fed into the process of balancing the 'technical' needs for housing with the needs identified through the Blueprint process, to produce a housing target and a development strategy that best meets the aspirations of the District.

2.9.28 The housing target of 11,000 proposed in the Housing Technical Paper (2011) is subject to further modifications as a result of an examination of Winchester District Local Plan Part 1 – Joint Core Strategy by an Inspector appointed by the Secretary of State for Communities and

Local Government. The basis for the examination was the submitted draft Local Plan of June 2012, which was essentially the same as the document published for consultation in January 2012.

Report to Winchester City Council and South Downs National Park Authority (June 2012)

2.9.29 The main purpose of the Planning Inspectorate's report was to provide an assessment of soundness and legal compliance of the Winchester District Local Plan Part 1 from June 2012. Amongst the main modifications recommended by the Inspector to make the Plan sound and capable of adoption was an increase in the new housing total for the District over the Plan period, from 11,000 to 12,500. This was considered to be realistic and positive in terms of the economic growth of the District. The adjustment of the figure upwards was the result of reasonably assessed capacities of the three main strategic areas from the Plan that revealed additional capacity at North Whiteley and in the Market Towns and rural Area. The report also set out an affordable annual housing delivery rate of around 250 units.

2.9.30 In relation to policy SH3 which specifically refers to North Whiteley, the report states that:

"Taking into account the overall size of the site and the technical analysis already undertaken, as well as the existence of a building consortium that stands ready to deliver the scheme, there is every indication that a higher total of about 3,500 new dwellings could be provided over the full plan period. Given that it is realistic, the higher figure would help to provide an improved degree of flexibility for new housing delivery over the district as a whole. It would also assist the viability of the overall project, as the available evidence is that, on the cumulative basis on which it must be considered in accord with the NPPF, the affordable housing percentage sought may have to be reduced somewhat, initially at least, in the present economic circumstances."

2.9.31 As the scheme is presently envisaged, it provides the opportunity to finally deliver a second road access to the area, by linking Whiteley Way to Botley Road to the north. The completion of Whiteley Way and the new school provision are regarded as "non-negotiable" elements and "essential at an early stage of development". The report points out that for the urban extension to be sustainable, it is important to fully deliver the new road link as soon as possible and undertake a Transport Assessment to accompany the planning application:

"This is so that vehicular access, except for buses, is no longer restricted to coming in and out of the area through Junction 9 of the M27, which is congested in both morning and evening peak periods. This situation, together with the relatively high level of car dependency locally and the somewhat restricted nature of the bus services in the area, all confirm the importance of a full Transport Assessment to support any planning application. As the policy says, this must include a comprehensive assessment of the existing access difficulties and proposals for improvements, including to Junction 9, as well as other parts of the road network locally and public transport services (both bus and rail), plus walking and cycling."

2.9.32 The Inspectorate's report concluded that all the work undertaken to date for North Whiteley development is sufficient to demonstrate that in transport terms, there is a very strong likelihood that all the necessary elements of the overall scheme would be *"practically and economically deliverable"*. Moreover, the allocation of the site for the construction of around 3,500 new houses was considered sound at this stage of the planning process.

Summary of Housing Policy Fit

2.9.33 Overall it is clear that the proposed development at North Whitely is consistent with and supports the key policy objectives for the area. In particular, the road link will help facilitate and support the development at North Whiteley. In turn, the housing development will make a positive contribution to delivering the target for 12,500 houses in the area up to 2031. In

addition, it will also contribute to the additional target for affordable housing required to meet demand over the same period.

2.9.34 Table 2.23 below summarises Strategic Policies at a national, regional and local level, along with an indication of whether proposals for North Whiteley are consistent with these policies.

Policy	Description	Consistent
National Planning Policy Framework		
NPPF Section 6	Delivering a wide choice of high quality homes	✓
NPPF Section 9	Conserving and enhancing the natural environment	✓
NPPF Plan-making	Using a proportionate evidence base	✓
Solent LEP		
Strategic Priority 2	Focus on infrastructure priorities including land assets, transport and housing, reducing flood risk and improving access to superfast broadband.	✓
Strategic Priority 3	Establishing a single inward investment model to encourage companies to open new sites in the region, supported by effective marketing.	✓
Strategic Priority 4	Investing in skills to establish a sustainable pattern of growth, ensuring local residents are equipped to take up the jobs that are created and businesses can source local skills and labour to underpin growth.	✓
Winchester District Local Plan – Joint Core Strategy		
Policy SH3	Strategic Housing Allocation – North Whiteley	✓

Table 2.23 Summary of relevant Housing/Development Policy fit

Transport Objectives

2.9.35 As part of the Strategic Case it is also important to undertake an evaluation of relevant transport and land use policies to ensure proposals fit with established aims and objectives. This section presents an overview of national, regional and local transport policies which are relevant to the proposals for North Whiteley. We note that the North Whiteley development is recognised in a number of these policies and strategies as an important development for the region.

National Policy

DfT White Paper Creating Growth and Cutting Carbon: Making Sustainable Transport Happen – 2011

2.9.36 The document sets out the Government's policy on transport. The White Paper supports economic prosperity, climate change and local transport to promote safe and sustainable transport choices to improve quality of life. This Statement aims to address these national priorities as they relate to the Winchester district to help:

- Create growth and planned regeneration where needed;
- Improve travel choices to encourage the safer and more sustainable movement of people and goods;

- Reduce carbon emissions and the dominance of traffic through more walking, cycling and passenger transport use.

2.9.37 Of the above, creating growth and planned regeneration where needed is the key policy of relevance to the North Whiteley development. The investment in the road infrastructure will support housing which will then help attract and / or retain people with the necessary range of skills and abilities to meet the 'skills for growth' priority; In addition, it will help to deliver inward investment by providing housing, infrastructure and facilities adjacent to the Solent Business Park and other nearby centres of employment.

National Planning Policy Framework (NPPF)

2.9.38 The National Planning Policy Framework (NPPF, Department for Communities and Local Government, 2012) sets out the Government's economic, environmental and social planning policies for the country. Taken together, these policies articulate the Government's vision of sustainable development, which should be interpreted and applied locally to meet local aspirations.

2.9.39 The NPPF sets out the Government's commitment to ensuring that the planning system does everything it can to support sustainable economic growth.

2.9.40 The NPPF sets out 12 Core Planning Principles with regards to the principles that authorities should consider in determining planning applications (rather than those which specifically relate to plan making). Those which appear particularly relevant to the North Whiteley development are as follows:

*"**1**. be genuinely plan-led, empowering local people to shape their surroundings, with succinct local and neighbourhood plans setting out a positive vision for the future of the area. Plans should be kept up-to-date, and be based on joint working and co-operation to address larger than local issues. They should provide a practical framework within which decisions on planning applications can be made with a high degree of predictability and efficiency"*

*"**3**. Pro-actively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business, and other development needs of an area, and respond positively to wider opportunities for growth."*

*"**4**. always seek to secure high quality design and a good standard of amenity for all existing and future occupants of land and buildings"*

*"**9**. Promote mixed use developments, and encourage multiple benefits from the use of land in urban and rural areas."*

*"**11**. Actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable."*

*"**12**. take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs"*

Regional Policy

Local Transport Plan 3 – Joint Strategy for South Hampshire

2.9.41 LTP3 outlines the shared approach to transport in South Hampshire to 2031. The Strategy has been developed jointly by the three Local Transport Authorities of Hampshire County Council,

Portsmouth City Council and Southampton City Council, working together as Transport for South Hampshire (TfSH), now Solent Transport. The document itself sets out the following:

- The regional context;
- Specific challenges facing the region;
- A review of transport policies;
- A series of transport policies for the South Hampshire area.

2.9.42 Transport for South Hampshire set out their strategic vision as:

A resilient, cost effective, fully-integrated sub-regional transport network, enabling economic growth whilst protecting and enhancing health, quality of life and environment

2.9.43 One of the key challenges identified within the document is:

Ensuring the timely delivery of transport infrastructure to support housing and employment growth and regeneration opportunities.

2.9.44 This challenge would appear to be particularly relevant for the Whiteley development.

2.9.45 The Strategy provides 14 bespoke policies, 6 of which are relevant and consistent with the proposed development at Whiteley. These are set out below. Policy N would appear to be particularly relevant, not only supporting the principles of the North Whiteley development, but actively mentioning and supporting the development itself.

*"**Policy C** - To optimise the capacity of the highway network and improve journey time for all modes"*

*"**Policy D** - To achieve and sustain a high-quality, resilient and well-maintained highway network for all"*

*"**Policy E** – To deliver improvements in air quality"*

*"**Policy H** - To promote active travel modes and develop supporting infrastructure"*

*"**Policy L** - To work with Local Planning Authorities to integrate planning and transport"*

***"Policy N -** To safeguard and enable the future delivery of transport improvements within the TfSH area…….. Enabling developer-led road improvements to facilitate access to planned major development areas (such as North Whiteley)"*

Solent Transport Delivery Plan 2012 - 2026

2.9.46 The Transport Delivery Plan is a strategic document that identifies a set of schemes for the period up to 2026. Schemes are framed by an overall approach to delivery that positions Solent LEP with the flexibility to mobilise quickly and to secure funding opportunities from a variety of sources. It should be noted from the outset that this is not a Transport Strategy, but a plan to identify and deliver schemes.

2.9.47 The document provides the following:

- Context and scene setting for the area;
- Current and future transport situation;

- Committed schemes;
- A delivery plan.

2.9.48 Consistent with LTP 3, the Delivery Plan recognises and supports projects at Whiteley. Specific mention is made of the following strategic projects:

- ***Project 10 -*** *North Whiteley Bus Service Improvements (Development-related). The scheme includes increased bus services and frequencies for buses serving North Whiteley. Proposals are designed to serve for the first phase of the North Whiteley development.*
- ***Project 32 -*** *Whiteley Way Northern Extension to A3051. The planned expansion includes proposals for around 3,000 dwellings on land north of Whiteley and east of A3051 Botley Road including pre-school facilities, two additional primary schools and a secondary school, provision for primary health care and the completion of Whiteley Way are planned for this location;*
- ***Project 33 -*** *M27 Junction 9 (Whiteley). The scheme would provide additional capacity at this junction a free-flow lane from Whiteley Way south-bound to the eastbound on-slip of M27.*

2.9.49 The delivery plan itself noted that at time of writing the Whiteley Way Northern Extension was at the feasibility stage.

Local and Sub Regional Policy

Solent LEP

2.9.50 LEPs have been set up across the country to help drive economic growth. The Solent LEP includes the southern areas of Winchester including Whiteley. The area is an international gateway and economic area covering a population of over 1.3 million and some 50,000 businesses. The LEP looks to bring together the private and public sector to help prioritise investment for key infrastructure, including transport.

2.9.51 The LEP features five strategic priorities, one of which is particularly relevant to support the development at Whiteley:

"Focus on infrastructure priorities including land assets, transport and housing, reducing flood risk and improving access to superfast broadband"

Winchester District Local Plan – Joint Core Strategy

2.9.52 The Winchester District Local Plan Part 1: Joint Core Strategy was adopted in March 2013 by Winchester City Council and the South Downs National Park Authority.

2.9.53 The Local Plan Part 1 is the long term strategic plan for development within Winchester District to 2031. It has been developed over time and subject to various studies aimed at assessing the likely transport impacts, relationships with adjoining authorities' growth strategies and potential transport measures required to support development.

2.9.54 The North Whiteley site is recognised in the Winchester District Local Plan Part 1: Joint Core Strategy as providing an opportunity to secure important infrastructure and community facilities, and to locate new residential development close to major employment areas. In particular the development offers the opportunity to complete the Whiteley Way as a new road primarily aimed at serving the new development but which will provide a new link to the Botley Road. The development should provide for a new secondary school and two new primary

schools which, in addition to meeting the needs of the new development, will also serve to meet existing shortfalls in educational facilities in the area.

2.9.55 Policies of relevance for the proposed development include:

*"**Policy CP10** – Transport. The Local Planning Authority will seek to reduce demands on the transport network, manage existing capacity efficiently and secure investment to make necessary improvements. Development should be located and designed to reduce the need to travel. The use of non-car modes particularly walking and cycling should be encouraged through travel plans, management and improvements to the existing network, and improvements to accommodate additional traffic should be undertaken (or funded) where necessary."*

*"**Policy CP21** – The Local Planning Authority will support development proposals which provide or contribute towards the infrastructure and services needed to support them, which should be delivered using the following approach:-*

- *testing the capacity of existing infrastructure and where there is insufficient capacity securing the timely provision of improvements or additional provision*
- *infrastructure provision or improvements should be provided on-site as an integral part of a development, wherever possible and appropriate*
- *where off-site measures are needed, or on-site provision is not possible, planning obligations will be needed to secure the necessary provision or a financial contribution towards provision*
- *where a contribution towards other infrastructure improvements or provision is needed and viable this will be achieved through planning obligations, or the Community Infrastructure Levy when introduced*

Any on-site provision or financial contribution should:-

- *meet the reasonable costs of provision to support the development or offset its impact; and*
- *be related to the size and type of each development and the nature of the improvements required; and*
- *take account of the cumulative impact of requirements on the viability of development, especially where the development meets a particular local need or provides particular benefits*

The Local Planning Authority will support the improvement or development of locally and regionally important infrastructure where needed to serve existing or new development required through this Plan, or to secure long term supply, provided that the need for such facilities is consistent with other policies within this Plan"

2.9.56 The current version of the Winchester District Local Plan Part 1: Joint Core Strategy has been developed over time and subjected to various studies aimed at: assessing the likely transport impacts, relationships with neighbouring authorities' growth strategies and potential transport measures required to support development.

Winchester District Transport Statement - 2012

2.9.57 The Winchester District Transport Statement sets out the transport objectives and delivery priorities for the Winchester District. The purpose of the Strategy is to:

- Provide a district-wide transport policy framework;
- Prioritise transport investment;
- Provide a basis for land-use and development planning;
- Help the local planning authorities to plan transport improvements in support of the Winchester District Local Plan Part 1.

2.9.58 The Transport Statement specifically notes proposed and planned developments in the area, including *"the North Whiteley Development: Situated to the north of the M27 Junction 9, it provides for 3,000 houses, two local centres and one secondary and two primary schools."*

2.9.59 Transport Objective 3 and associated delivery priority also supports the Whiteley development:

"Objective 3: Help unlock opportunities for new development - Improve walking, cycling and passenger transport access to existing communities and for the new ones proposed across the district in Winchester, Whiteley and Waterlooville."

North Whiteley Access and Movement Plan

2.9.60 The Access and Movement Strategy was prepared to support the North Whiteley development. The Strategy was prepared by Peter Brett Associates LLP on behalf of the North Whiteley Consortium.

2.9.61 The strategy draws upon both national and local planning policy, as well as considering the development proposals in the context of the baseline conditions including a description of local facilities, walking and cycle routes in the area, public transport and the local highway network.

2.9.62 The Access and Movement Strategy identified key deliverables required to support the development:

- Improved Road Infrastructure;
- Local traffic management and road safety improvements;
- High quality pedestrian and cycle access;
- Improved public transport accessibility and service provision;
- Improved integration for the existing community at Whiteley with the surrounding communities and transport links serving them;
- Travel Planning / Smarter Choices Commitment.

Summary of Transport Policy Fit

2.9.63 Table 2.24 below summarises Strategic Policies at a national, regional and local level, along with an indication of whether proposals for Whiteley are consistent with policies.

Policy	Description	Consistent
National Planning Policy Framework		
NPPF 1	be genuinely plan-led, empowering local people to shape	✓

Policy	Description	Consistent
	their surroundings, with succinct local and neighbourhood plans setting out a positive vision for the future of the area	
NPPF 3	proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs.	✓
NPPF 4	seek to secure high quality design and a good standard of amenity for all existing and future occupants of land and buildings	✓
NPPF 9	promote mixed use developments, and encourage multiple benefits from the use of land in urban and rural areas	✓
NPPF 11	actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable	✓
NPPF 12	take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs	✓
Local Transport Plan 3 – Joint Strategy for South Hampshire		
Policy C	To optimise the capacity of the highway network and improve journey time for all modes	✓
Policy D	To achieve and sustain a high-quality, resilient and well-maintained highway network for all	✓
Policy E	To deliver improvements in air quality	✓
Policy H	To promote active travel modes and develop supporting infrastructure	✓
Policy L	To work with Local Planning Authorities to integrate planning and transport	✓
Policy N	To safeguard and enable the future delivery of transport improvements within the TfSH area	✓
Transport Delivery Plan 2012 - 2026		
Project 10	North Whiteley Bus Service Improvements (Development-related)	✓
Project 32	Whiteley Way Northern Extension to A3051	✓
Project 33	M27 Junction 9 (Whiteley)	✓
Solent LEP		
Strategic Priority 2	Focus on infrastructure priorities including land assets, transport and housing, reducing flood risk and improving access to superfast broadband	✓
Winchester District Local Plan – Joint Core Strategy		
Policy CP10	Transport	✓
Policy CP21	Infrastructure and Community benefit – implementation and monitoring	✓

Policy	Description	Consistent
Winchester District Transport Statement -2012		
Objective 1 – Priority 3	Work with the Highways Agency to develop capacity improvements at the M3 Junction 9 and M27 Junction 9	✓
Objective 2 – Priority 3	Improve the district's walking and cycling networks, including better links to employment centres, businesses, town and village centres, schools and rail stations among others	✓
Objective 3 – Priority 3	Improve walking, cycling and passenger transport access to existing communities and for the new ones proposed across the district in Winchester, Whiteley and Waterlooville	✓

Table 2.24 Summary of relevant Transport Policy Fit

2.9.64 The preceding section illustrates the extent to which the development at Whiteley supports national, regional and local transport planning policies. We have also shown where the Whiteley development is specifically mentioned and supported within strategic planning documents.

2.10 Conclusions

2.10.1 The primary purpose of the Strategic Case included in this chapter is to provide a detailed evidence base to demonstrate the case for investment in a link road and wider package of highway improvement works which is required to support a major housing and community development at North Whiteley in Winchester.

2.10.2 The housing development at North Whiteley is an essential component of the Winchester District Local Plan Part 1 Joint Core Strategy and will contribute to delivering approximately one third of the Council's target of 12,500 dwellings. It will help address the shortage in housing supply and housing affordability issues in the District and generate the growth needed in a sustainable, timely and properly phased manner.

2.10.3 In order to help support the housing development a new highway link and wider package of highway improvement works are proposed. The new link consists of the early provision of Bluebell Way and the construction of the first 1,000m of Whiteley up to the proposed secondary school.

2.10.4 The proposed package of off-site works includes the provision of additional vehicular capacity, and improved access for sustainable modes of travel, through the provision of bus lanes, a strategic foot/cycleway and improved crossings over existing highway links to significantly improve the permeability and accessibility of the existing area for pedestrians and cyclists.

2.10.5 The scheme supports the early provision of housing in accordance with the proposed phasing strategy, as well as delivering additional benefits through significant highway capacity and sustainable travel enhancements. The new link and wider package of highway improvement works will serve both the employment and commercial uses and the residential areas.

2.10.6 A Transport Assessment was undertaken that aims to provide highway and transport advice in support of the proposed link and wider package of highway improvement works. As part of the TA, the infrastructure associated with the North Whiteley development has been tested and shown to mitigate the impacts of the full development once completed, with the future network predicted to operate better with North Whiteley and its associated package of measures than without.

2.10.7 In addition to improving the wider transport network, providing a range of sustainable transport choices and offering a wide choice of high quality homes, the proposals at North Whiteley are

also expected to deliver the much needed education infrastructure, a range of community facilities and extensive areas of green infrastructure to create healthier lifestyles.

2.10.8 Finally, the allocation at North Whiteley is in accordance with NPPF principles and other key housing and transport policy objectives in terms of making the most of opportunities to deliver growth, the development of sustainable mixed-use communities and encouraging the effective use of land with minimal environmental impact.

3 Economic Case

3.1 Introduction

3.1.1 This section sets out the Economic Case for the link road and wider package of highway improvement works that is to be constructed to support the housing and other developments proposed for North Whiteley. The analysis to support the Case has been carried out in accordance with the Department for Transport's WebTAG and Transport Business Case guidance, taking a proportionate approach to appraisal as suggested. In particular, the process has followed the four-step approach set out in the Department's recently published TAG Unit A2.3: *Transport Appraisal in the Context of Dependent Development*. The aim is to provide an assessment of the impacts generated by the link road and demonstrate that it will offer value for money in the use of scarce public sector resources and taxpayers' money, both in terms of supporting the development of the road and wider package of highway improvement works and also the wider housing development in North Whiteley.

3.1.2 The chapter starts by explaining the model that has been used to inform the analysis. This is followed by the results covering Steps 1 to 3 in Unit A2.3. As recommended, the results in Step 3 are summarised in tabular form using the Department's summary tables, in terms of:

- Analysis of Monetised Costs and Benefits Table;
- Public Accounts Table;
- Transport Economic Efficiency Table.

3.1.3 The following section then summarises the results of the Department's Step 4 ie an assessment of the benefits of the dependent development.

3.2 Model Used

3.2.1 This section provides a summary of the model used to support the Economic Case.

3.2.2 The Solent Transport Sub-regional Transport Model (SRTM) modelling suite is an evidence-based land-use and transport interaction model developed to provide a strong analytical basis for the development of coherent, objective-led implementation plans to enable the changes in transport provision required to deliver prosperity to the area.

3.2.3 The integrated forecasting approach contains a suite of transport models and an associated Local Economic Impact Model (LEIM). The toolkit has been developed to assist in the ongoing investigation, appraisal and assessment of different: policies; strategies; and infrastructure, management and operational interventions on land-use policies and transport provision. The model is WebTAG compliant and has been used to support a number of business cases that have been successful in receiving public sector funding from the Department.

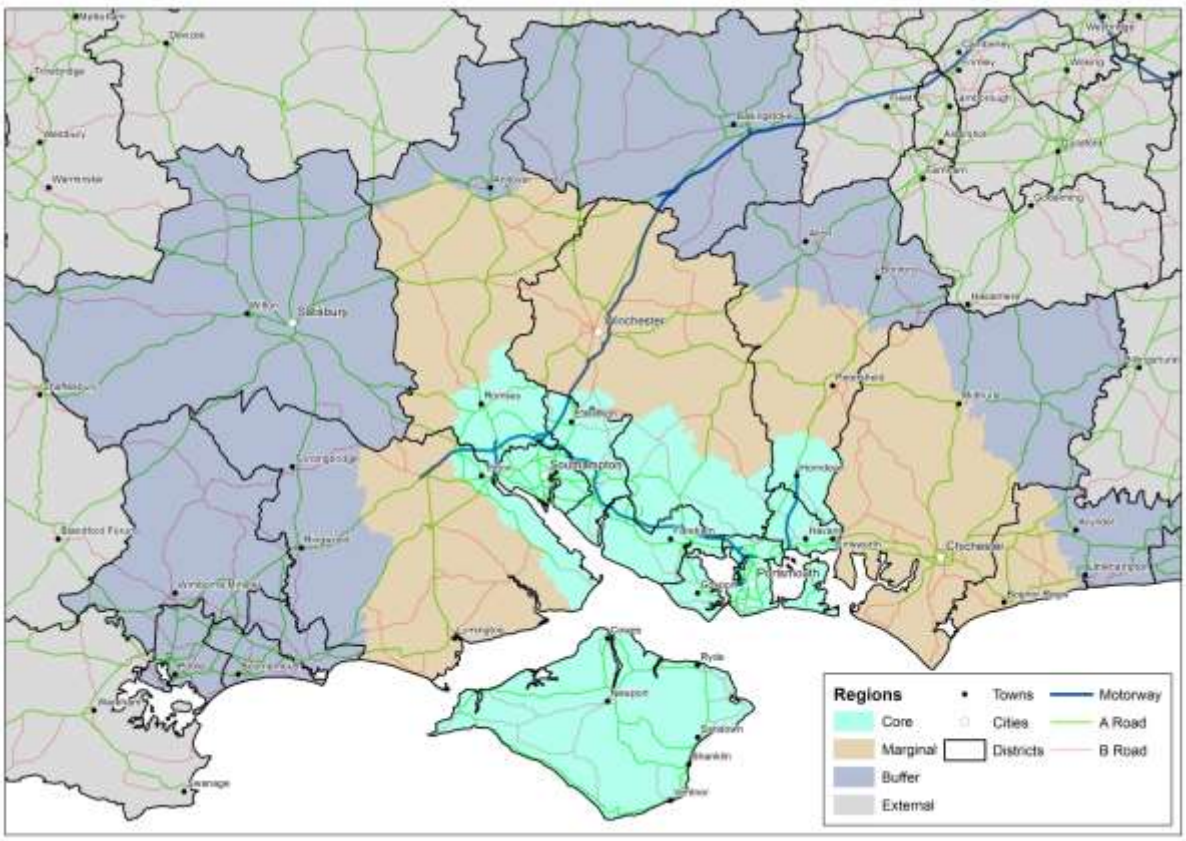

Figure 3.1 SRTM Modelled Area Definitions

3.2.4 The main TfSH area (shown in green in Figure 3.1 above) contains the detailed network models and this area, combined with the surrounding area (shown in brown), is covered by LEIM.

3.2.5 The Local Economic Impact Model forecasts:

- The supply of housing;
- The number of households by type;
- The population by person types;
- The number of jobs by sector;
- The amount of commercial floorspace.

3.2.6 The LEIM forecasts are produced for each year of the forecast period (2011 – 2041), and are affected by a range of factors, including, importantly, the performance of the transport network which is input for the years 2014, 2019, 2026, 2031 and 2036.

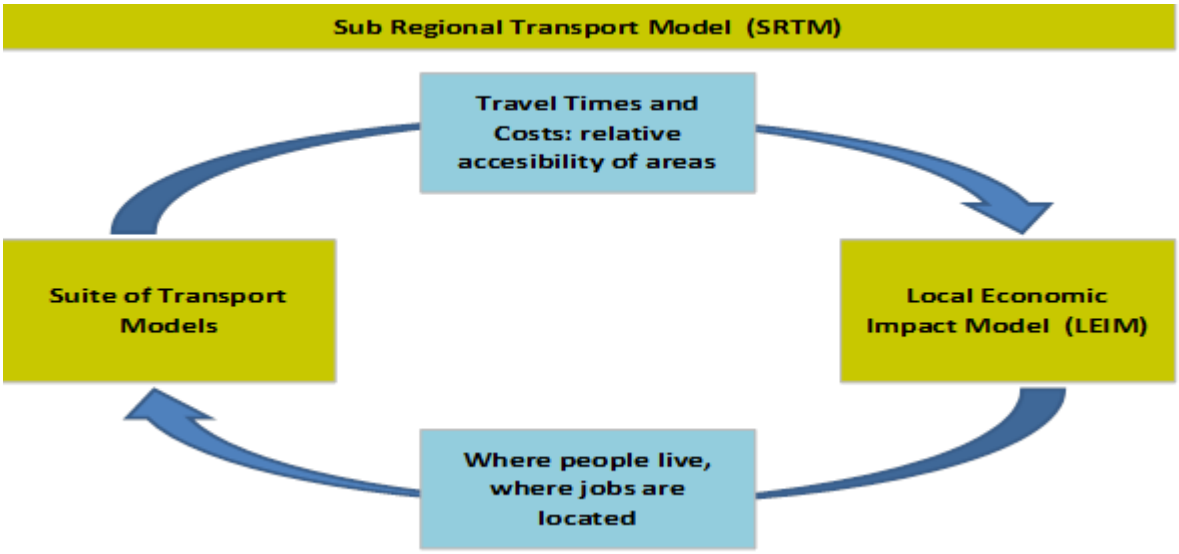

Figure 3.2 The elements of the Sub Regional Transport Model

3.2.7 The changes in the supply of housing and employment floorspace are controlled in line with local planning policies and national figures in TEMPRO 6.2. Planning assumptions on permissible development were collected from the relevant local planning authorities and they cover the period up to 2026. For the period beyond 2026 LEIM assumes a greater intensification of use at existing sites only.

3.2.8 The overall growth of Hampshire can be allowed to vary within constraints set by the TEMPRO data at a sector level, to test the impact of transport and planning policies, or it can be fixed to test the consequences of higher or lower levels of growth.

3.2.9 The outputs of the LEIM are used by the transport models to predict the demand for travel to and from areas within Hampshire and these can be compared to assess the land-use/economic impacts of different planning and transport policies.

3.2.10 The models are set up for a base year of 2010 with forecast scenarios for 2014, 2019, 2026, 2031 & 2036. The transport models represent travel conditions for the morning and evening peak periods and the inter-peak period. They estimate the changing patterns of travel separately for travellers undertaking journeys for different purposes (e.g. for commuting or for education-related journeys) and for light and heavy goods vehicles.

3.2.11 The model has been adjusted to account for the proposed changes to the local network as set out in the Strategic Case discussed in Chapter 2.

3.2.12 The suite of transport models comprises the Main Demand Model (MDM), the Gateway Demand Model (GDM), Road Traffic Model (RTM) and Public Transport Model (PTM). Figure 3.3 shows the interaction of the various models within the SRTM.

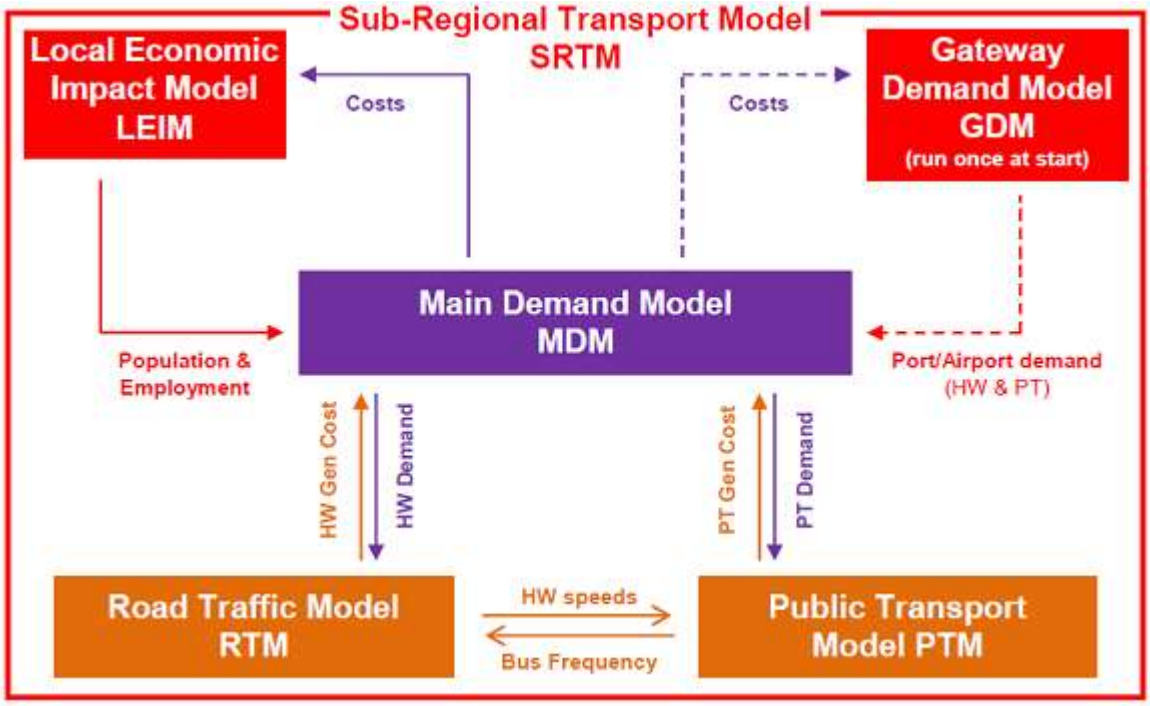

Figure 3.3 The SRTM and the Interaction of the Various Models

3.3 Economic Case Results / Findings

3.3.1 This section provides the main focus of the Economic Case. As explained in the introduction, the approach follows that recommended in the DfT's WebTAG Unit A2.3: Transport Appraisal in the Context of Dependent Development. The Unit provides guidance on assessing the economic benefits generated by transport in the context of dependent development. In line with the Unit, the approach here has followed a four-step process:

- Step 1: Determine the quantity of new housing that should be regarded as dependent on a transport scheme;
- Step 2: Identify the minimum transport scheme required to restore a reasonable level of service;
- Step 3: Assess the benefits of the transport scheme in isolation; and
- Step 4: Assess the benefits of the dependent development.

3.3.2 The remainder of this section sets out the results of the analysis using the four-step structure and in line with the reporting of the analysis recommended in the guidance Unit.

Step 1: Determine whether New Housing is Dependent on a Transport Scheme

3.3.3 Section 2.5 in the Strategic Case reported on the findings from the Transport Assessment which has been undertaken as part of the work required to support the development. To carry out a test for dependency, a future year reference case 'without development' scenario has been created for comparison against a 'with development' scenario.

3.3.4 Outputs from model runs for the two scenarios provided evidence that the proposed new housing development would have a detrimental impact on the current transport network if it

was not supported by some form of transport scheme. In particular, the results from the assessment indicate that the development will have a large impact on some of the key junctions in the area, especially junctions on Whiteley Way and the M27 J9. It should be noted though that the TA also demonstrated that the 'without development' scenario was already experiencing a significant amount of congestion. This implies that the local highway network will fail to operate effectively even in the absence of the new development.

3.3.5 As a result of the above it was concluded that without the new infrastructure the transport network will not provide a 'reasonable level of service' as defined in WebTAG Unit A2.3 and that the new housing is likely to be wholly dependent on a transport scheme.

Step 2: Identify an Appropriate Transport Scheme

3.3.6 As the Strategic Case explained, the proposed road and wider package of highway improvement works will provide a new link between Whiteley Way and Botley Road as well as wider vehicular and sustainable transport enhancements within the existing Whiteley area. The original alignment through the site was to be that represented by the blue line in Figure 1.2. However, as also explained in the Strategic Case, since the time of the original submission, the North Whiteley Consortium has continued to consult with the Local Planning and Highway Authorities and Town Council on the proposed phasing of the development and its associated infrastructure.

3.3.7 As a result of this exercise, the Consortium has identified an alternative package of highway works which deliver the objectives of the initial scheme, support the early provision of housing in accordance with the proposed phasing strategy, as well as deliver additional benefits through significant highway capacity and sustainable travel enhancements within Whiteley. This is represented by the orange line in Figure 1.2. The revised development phasing also provides the most efficient means of building out the site, delivers critical highway and education infrastructure early, and addresses concerns raised by the authorities on alternative phasing options.

3.3.8 In particular, the revised scheme consists of the early provision of Bluebell Way, construction of the first 1,000m of Whiteley Way up to the proposed secondary school access loop, at the point where Whiteley Way meets Curbridge Way, as well as significant enhancements to off-site highway capacity and sustainable travel infrastructure within Whiteley as described below:

- Early completion of Bluebell Way, providing a new highway route through the new development between the existing community and Botley Road, enabling early housing delivery, early access to the first primary school site and join the new and existing communities to the existing highway network to the north.
- Early provision of the first 1,000m of the Whiteley Way extension through the new development, enabling early housing delivery and early access to the secondary school site.
- Significant highway capacity enhancements within the existing Whiteley area, connecting with the impending HA scheme at M27 J9 and providing improvements to the entire length of Whiteley Way.
- The provision of sustainable travel infrastructure within Whiteley in the form of a strategic foot / cycleway along the entire length of Whiteley Way, connecting local residents, employees and visitors to Whiteley Town Centre with the wider network.
- Early provision of bus priority within Whiteley, to support the proposed bus services associated with the North Whiteley development.

3.3.9 While the revised option is the preference of the Consortium, both options have been modelled and tested in line with WebTAG Unit 2.3A. The results for both options are presented in the following section.

Step 3: Assess the Benefits of the Transport Scheme in Isolation

3.3.10 While the revised option provides the preferred solution, in terms of delivering the development in line with the most effective phasing as well as supporting the highway and education infrastructure plans, the analysis looked at the impacts of both options ie the original Option 1 and the revised Option 2. The results are set out in the remainder of this section. The results of both options are summarised in terms of present value of benefits (PVB), present value of costs (PVC), Net Present Value (NPV) and Benefit Cost Ratio (BCR). Following this, more detailed results are presented for the revised option, in terms of the tables recommended in WebTAG Unit 2.3A:

- Transport Economic Efficiency (TEE) table;
- Public Accounts (PA) table; and
- Analysis of Monetised Costs and Benefits (AMCB) table.

3.3.11 The headline results are presented in Table 3.1 below.

Indicator	Option 1	Option 2
Present Value of Costs (PVC)	£15.6m	£10.4m
Present Value of Benefits (PVB)	£23.4m	£11.6m
Net Present Value (NPV)	£7.8m	£1.2m
Benefit Cost Ratio (BCR)	1.50	1.12

Table 3.1 Summary of Economic Results

3.3.12 The results above show that the BCR for option 1 is 1.50. This compares with a figure of 1.12 for option 2. While the BCR for option 1 is slightly higher, it is clear that the benefits associated with both options outweigh the costs and in that sense offer value for money. More importantly, both options will facilitate significant private sector investment and increase the supply of housing, achievements that are entirely consistent with the vision set out in the Solent Strategic Economic Plan Transforming Solent.

3.3.13 While the benefits of both options outweigh the costs, there are a number of benefits generated by the revised option which are not quantified and monetised and therefore not necessarily captured in the BCR for option 2, including early implementation of highway and education infrastructure. These additional impacts are only provided by the revised option and this is the one preferred by the Consortium. The remainder of this section therefore sets out a summary of the outputs / results of the modelling undertaken for this option.

3.3.14 The Transport Economic Efficiency outputs are set out in Table 3.2 below. The table shows that the present value of transport economic efficiency benefits of £13.3m (discounted over the 60-year appraisal period using HMT recommended discount rates as set out in WebTAG). The table also shows that these consist of benefits to commuters (£2.9m), other non-business (£9.1m) and net business impacts (£1.3m).

Non-business: Commuting	**ALL MODES**			**ROAD**	**PT**	**ACTIVE MODES**
User benefits	**TOTAL**			**Private Cars and LGVs**	**Passengers**	**Passengers**
Travel time	1335			1688	-352	0
Vehicle operating costs	1414			1414	0	0
User charges	147			154	-7	0
During Construction & Maintenance	0			-	-	-
NET NON-BUSINESS BENEFITS: COMMUTING	2897	*(1a)*		3256	-359	0
Non-business: Other	**ALL MODES**			**ROAD**	**PT**	**ACTIVE MODES**
User benefits	**TOTAL**			**Private Cars and LGVs**	**Passengers**	**Passengers**
Travel time	5947			3462	2485	0
Vehicle operating costs	3392			3392	0	0
User charges	-250			139	-389	0
During Construction & Maintenance	0			-	-	-
NET NON-BUSINESS BENEFITS: OTHER	9089	*(1b)*		6993	2096	0
Business				**ROAD**	**PT**	**ACTIVE MODES**
User benefits			**Goods Vehicles**	**Business Cars & LGVs**	**Passengers**	**Freight**	**Active Passengers**
Travel time	2567		726	2507	-665	-	0
Vehicle operating costs	322		51	271	0	-	0
User charges	-357		127	-467	-18	-	0
During Construction & Maintenance	0		-	-	-	-	-
Subtotal	2532	*(2)*	904	2311	-683	0	0
Private sector provider impacts						**Freight**	**Passengers**
Revenue	-1219				-	-	-1219
Operating costs	0				-	-	-
Investment costs	0				-	-	-
Grant/subsidy	0				-	-	-
Subtotal	-1219	*(3)*			0	0	-1219
Other business impacts							
Developer contributions	0	*(4)*		-	-		-
NET BUSINESS IMPACT	1313	*(5) = (2) + (3) + (4)*					
TOTAL							
Present Value of Transport Economic Efficiency Benefits (TEE)	13300	*(6) = (1a) + (1b) + (5)*					
	Notes: Benefits appear as positive numbers, while costs appear as negative numbers.						
	All entries are discounted present values, in 2010 prices and values						

Table 3.2 Transport Economic Efficiency table

3.3.15 Public Accounts table is set in Table 3.3 below. The purpose of the table is to demonstrate the impact on the net costs to the 'broad transport budget'. The results show that the present value of the net impact on the broad transport budget is £10.4m. In addition, the present value of the impact on Wider Public Finances is £1.6m.

Local Government Funding	ALL MODES	ROAD	PT	ACTIVE MODES
Revenue	-2748	-2748	0	0
Operating Costs	0	0	0	0
Investment Costs	0	0	0	0
Developer Contributions	0	0	0	0
Grant/Subsidy Payments	0	0	0	0
NET IMPACT	-2748	-2748	0	0
Central Government Funding: Transport	**ALL MODES**	**ROAD**	**PT**	**ACTIVE MODES**
Revenue	0	0	0	0
Operating costs	0	0	0	0
Investment costs	13100	13100	0	0
Developer Contributions	0	0	0	0
Grant/Subsidy Payments	0	0	0	0
NET IMPACT	13100	13100	0	0
Central Government Funding: Non-Transport	**ALL MODES**	**ROAD**	**PT**	**ACTIVE MODES**
Indirect Tax Revenues	1634	1866	-232	0
TOTALS	**ALL MODES**	**ROAD**	**PT**	**ACTIVE MODES**
Broad Transport Budget	10352	10352	0	0
Wider Public Finances	1634	1866	-232	0
	Note: Costs appear as positive numbers, while revenues and developer contributions appear as negative numbers.			
	Note: All entries are present values discounted to 2010, in 2010 prices			

Table 3.3 Public Accounts table

3.3.16 The Analysis of Monetised Costs and Benefits (AMCB) table is set out below. As the name suggests, the aim here is to aggregate the monetised costs and benefits set out in the TEE and PA tables to generate a BCR and NPV of those impacts.

3.3.17 The table shows that the overall package of measures generates a present value of benefits of £11.6m over the 60-year appraisal period (reduced from £13.2m once indirect tax is considered). The main benefits are split by businesses (£1.3m) and consumers (£12.0m, including commuting and other non-business impacts). In addition, the present value of costs, taken from the impact on the broad transport budget, is equal to £10.4m. These figures then generate an NPV of £1.2m and a BCR of 1.1.

Greenhouse Gases	-81
Economic Efficiency: Consumer Users (Commuting)	2897
Economic Efficiency: Consumer Users (Other)	9089
Economic Efficiency: Business Users and Providers	1313
Wider Public Finances (Indirect Taxation Revenues)	-1634
Present Value of Benefits (PVB)	**11585**
Broad Transport Budget	**10352**
Present Value of Costs (PVC)	**10352**
OVERALL IMPACTS	
Net Present Value (NPV)	**1232**
Benefit to Cost Ratio (BCR)	**1.119**
Note: This table includes costs and benefits which are regularly or occasionally presented in monetised form in transport appraisals, together with some where monetisation is in prospect. There may also be other significant costs and benefits, some of which cannot be presented in monetised form. Where this is the case, the analysis presented above does NOT provide a good measure of value for money and should not be used as the sole basis for decisions.	

Table 3.4 Analysis of Monetised Costs and Benefits

Employment Impacts

3.3.18 Solent LEP has a target to increase the number of jobs in the area by 15,500 by 2020. An investment in this project will make a significant contribution to that target. Table 3.5 below reveals that the Northern Local Centre will create 120 non-construction and 12 construction full time equivalent jobs. In the Southern Local Centre, the equivalent numbers are 137 and 21 respectively. This sums to 257 non-construction and 33 construction jobs in total. In addition to this, a total of 366 construction jobs will be created by the construction of the housing development. Overall, this will result in a total of 656 full time equivalent jobs over the period.

3.3.19 In addition to these jobs, the Consortium will invest in training to ensure the new labour has the necessary skills required to equip employees and deliver the development in line with targets. This will involve significant investment in both new full time adult employees and new apprenticeships from the local labour force. All of this will result in a more qualified workforce and be consistent with the skills agenda and targets set out in the Strategic Economic Plan.

	Data provided to date						PBA Interim Est. Con. Cost	PBA Estimated Employment		
	Sq.m.	Units	Beds Min.	Beds Max.	Pupils Min.	Pupils Max.	Construction Cost	Gross Employment (permanent)	Construction Jobs	
Northern Local Centre								FTEs	1 person yr	Perm. FTE
Retail units (split into 4 units)	512	-	-	-	-	-	£740,000	27	8	1
Nursery	432	-	-	-	-	-	£670,000	5	7	1
Convenience Store	362	-	-	-	-	-	£530,000	19	6	1
Community Centre	650	-	-	-	-	-	£750,000	2	8	1
Primary School (pupils)	-	-	-	-	420	630	£4,870,000	25	51	5
Care home (no. of bed rooms)	-		70	80	-	-	£3,890,000	42	41	4
TOTAL	**1,956**	**-**	**70**	**80**	**420**	**630**	**£11,450,000**	**120**	**120**	**12**
Southern Local Centre										
Retail Units (split into 2 units)	250	-	-	-	-	-	£360,000	13	4	0
Nursery	450	-	-	-	-	-	£700,000	5	7	1
Primary School	-	-	-	-	630	630	£6,420,000	30	67	7
Secondary School	-	-	-	-	1350	1350	£12,700,000	88	133	13
TOTAL	**700**	**-**	**-**	**-**	**1,980**	**1,980**	**£20,180,000**	**137**	**211**	**21**
Northern & Southern Total							**£31,630,000**	**257**	**331**	**33**
Additional Resi Units	**3,500**						**£350,000,000**	**-**	**3663**	**366**

Table 3.5 Employment Impacts

Step 4: Assess the Benefits of the Dependent Development

3.3.20 The guidance explains that the purpose of this step is to estimate the benefits associated with the dependent development. It is a two-part process:

- Estimate the 'planning gain' arising from the dependent new homes;
- Then subtract the net external costs caused by the dependent new homes.

3.3.21 Applying the DfT 'Valuing Housing Impacts' Workbook, results in a figure of £182m for the value of the residential development (108 hectares) after it is built. Subtracting a figure to cover the value for loss of amenity to the public from its current use (£52m) results in a planning gain value of £130m.

3.3.22 The next stage is to subtract the net external costs caused by the dependent new homes. The results from the Sub-regional Transport Model reveal the net external cost caused by the dependent new homes amounts to £16.75m. Subtracting this from the planning gain figure reveals the benefits of the dependent development to be £113.25m. Applying this to Table 3.6, which is included in the WebTAG Unit A2.3 to provide a suggested qualitative assessment score, shows that the North Whiteley development generates a 'large beneficial' score.

Benefits	Score
Greater than £100m	Large beneficial
Between £100m and £25m	Moderate beneficial
Between £25m and zero	Slight beneficial
Zero	Neutral
Between zero and -£25m	Slight adverse
Between -£25m and -£100m	Moderate adverse
Less than -£100m	Large adverse

Table 3.6 Suggested qualitative assessment scores

3.3.23 In conclusion, the analysis carried out as part of the Economic Case shows that, in transport appraisal terms, the benefits associated with the highway link outweigh the costs. In addition, the benefits of the dependent development score a 'large beneficial' impact.

4 Financial Case

4.1 Introduction

4.1.1 This chapter outlines the aspects of the financial case for the proposed North Whiteley transport infrastructure scheme as described as the revised Option 2 in the previous chapters. Whilst the Strategic Case sets out the policy and strategic context for the scheme, the Financial Case is focused on long-term affordability. It is therefore concerned with a year-by-year view of likely costs, the extent to which there is agreed funding in place to meet those projected costs and the extent to which this is affordable. This contrasts with the Economic Case which examined the costs and benefits of the scheme in appraisal terms and converts these into net present values (NPVs) for the purposes of producing a benefit-cost ratio (BCR) to demonstrate value for money.

4.2 Costs

Key Assumptions

4.2.1 The key assumptions in preparing the final cost estimates for the North Whiteley scheme were as follows:

- Design Costs include the following Professional Fees:
  - Strategic Planning (including landscape) to discharge conditions is 1.5% of Construction Costs;
  - Engineering Design is 5% of Construction Costs;
  - Site Supervision and Administration is 3.4% of Construction Costs;
  - Project Management Fees are 1.4% of Construction Costs;
  - Cost Management represents 1.3% of Construction Costs;
  - Total 12.6% Construction Costs - total assumed to precede construction (during design / technical approvals stage) on a flat profile for simplicity
- Risk allowance was quantified at 10% of Construction Costs;
- Construction costs assumed to be flat through duration of infrastructure element for simplicity;
- Utility design and construction costs assumed flat profile across duration of infrastructure construction for simplicity;
- Development phasing / build rates taken from Terence O'Rourke Phasing Plans (assumes flat build rate per year);
- Costs associated with R1 tie into HA Interim Scheme yet to be confirmed;
- Whilst the LEP funding would pay for the design / approvals, the North Whiteley Consortium would fund the construction of the Highway Bridge across the central green corridor (or the residual LEP funding could contribute);

- Design work could commence immediately following Contract Signed between NWC and LEP (PCC). Earlier design start would reduce risk of programme delays affecting spend commitment in 2015/16;
- Technical Approvals would need to run in parallel with detailed design stages to achieve delivery programme;
- Tender / Contract Award / Mobilisation assumed to fall within identified timescales;
- Programme excludes ecology mitigation and relocation works at this stage;
- Costs exclude allowance for ecology mitigation and relocation works at this stage.

Cost Breakdown Structure

4.2.2 The total cost for the full scheme was estimated at £17.826m. This includes the £4.067m cost of constructing a highway bridge across the central green corridor that will be covered by the North Whiteley Consortium. Therefore, the funding sought for the overall package is £13.760m.

4.2.3 Table 4.1 includes disaggregated figures on design costs, construction costs, and risk allowance for each individual strand of the three project components. As mentioned in the previous section, risk allowance is calculated as 10% of construction costs and estimated to be £1.413m (including risk allowance for bridge construction).

4.2.4 There are three main project components:

- Off-site improvements to Whiteley Way;
- On-site Bluebell Way to Botley Road;
- On-site Whiteley Way to secondary school.

4.2.5 Table 4.2 provides a full breakdown of costs excluding highway bridge construction, at current (2014) prices, for four financial years, for each individual strand of the three project components. Figure 4.1 illustrates the monthly breakdown of estimated costs, with the highest proportion of costs occurring in financial year 2016/17.

Highway Infrastructure	Design Cost	Risk Allowance	Construction Cost	Total Cost
Off-Site Improvements to Whiteley Way (s278 Works)				
Whiteley Way Roundabout R3	23	19	186	228
Whiteley Way R3 - R2 (including Whiteley Village Junction)	88	70	702	860
Whiteley Way Roundabout R2	52	41	412	505
Whiteley Way R2 - R1, incl. R1a (Parkway)	76	61	605	742
Whiteley Way R1 and tie into HA Interim Scheme	188	149	1,489	1,826
Marjoram Way Connection	156	-	343	499
Total	**583**	**339**	**3,737**	**4,659**
On-Site Bluebell Way to Botley Road (s38 works)				
Western Access Junction onto Botley Road	44	35	349	428
Bluebell Way Year 1 (incl. foot/cycleway on existing)	115	92	916	1,123
Bluebell Way Year 2 / 3	131	104	1,041	1,276
Storm Water Drainage	56	44	442	542
BT	9	7	69	85
Gas	22	18	176	216
Water	23	18	184	225
Electricity	20	16	162	198
Total	**420**	**334**	**3,339**	**4,093**
On-Site Whiteley Way to Secondary School (s38 works)				
Whiteley Way Year 1	138	110	1,095	1,343
Whiteley Way Year 2	128	102	1,020	1,250
Highway Bridge across Central Green Corridor	466	370	3,697	4,533
Whiteley Way Year 3/4	49	39	386	474
Storm Water Drainage	58	46	457	561
BT	11	8	84	103
Gas	28	22	219	269
Water	30	24	239	293
Electricity	26	20	203	249
Total	**934**	**740**	**7,400**	**9,074**
TOTAL	**1,937**	**1,413**	**14,476**	**17,826**

Table 4.1 Breakdown of total costs by type (including construction of Highway Bridge across Central Green Corridor)

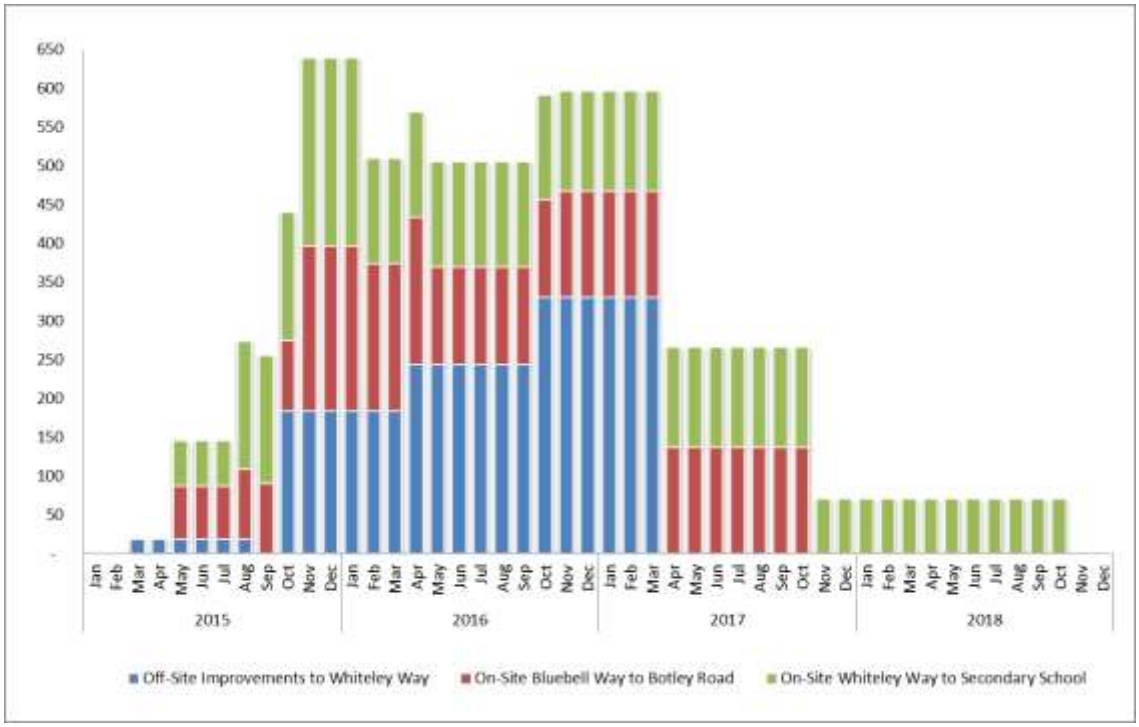

Figure 4.1 Monthly breakdown of total costs (excluding construction of Highway Bridge across Central Green Corridor)

Highway Infrastructure	2014/15	2015/16	2016/17	2017/18	2018/19	Total
Off-Site Improvements to Whiteley Way (s278 Works)						
Whiteley Way Roundabout R3	4	224	-	-	-	228
Whiteley Way R3 - R2 (including Whiteley Village Junction)	15	845	-	-	-	860
Whiteley Way Roundabout R2	-	52	453	-	-	505
Whiteley Way R2 - R1, incl. R1a (Parkway)	-	76	666	-	-	742
Whiteley Way R1 and tie into HA Interim Scheme	-	-	1,826	-	-	1,826
Marjoram Way Connection	-	-	499	-	-	499
Total	**19**	**1,197**	**3,444**	**-**	**-**	**4,659**
On-Site Bluebell Way to Botley Road (s38 works)						
Western Access Junction onto Botley Road	-	236	192	-	-	428
Bluebell Way Year 1 (incl. foot/cycleway on existing)	-	367	756	-	-	1,123
Bluebell Way Year 2 / 3	-	131	286	859	-	1,276
Storm Water Drainage	-	163	217	163	-	542
BT	-	25	34	25	-	85
Gas	-	65	86	65	-	216

Highway Infrastructure	2014/15	2015/16	2016/17	2017/18	2018/19	Total
Water	-	68	90	68	-	225
Electricity	-	59	79	59	-	198
Total	**-**	**1,114**	**1,740**	**1,239**	**-**	**4,093**
On-Site Whiteley Way to Secondary School (s38 works)						
Whiteley Way Year 1	-	439	903	-	-	1,343
Whiteley Way Year 2	-	128	281	842	-	1,250
Highway Bridge across Central Green Corridor	-	466	-	-	-	466
Whiteley Way Year 3/4	-	49	-	106	318	474
Storm Water Drainage	-	120	160	160	120	561
BT	-	22	30	30	22	103
Gas	-	58	77	77	58	269
Water	-	63	84	84	63	293
Electricity	-	53	71	71	53	249
Total	**-**	**1,398**	**1,605**	**1,369**	**635**	**5,007**
TOTAL (EXCLUDING HIGHWAY BRIDGE CONSTRUCTION)	**19**	**3,709**	**6,789**	**2,608**	**635**	**13,760**

Table 4.2 Breakdown of total costs by financial year (excluding construction of Highway Bridge across Central Green Corridor)

4.3 Funding Arrangements

4.3.1 The details of the funding sought for the overall scheme are provided in this section. The total cost of the interventions for which funding is required from LEP will be £13.760m. The yearly costs are expected to be £3.728m in years 2014/15 and 2015/16, £6.789m in year 2016/17, £2.608m in year 2017/18 and £0.635m in year 2018/19.

4.3.2 The total contribution accessible from the LEP is £14.000m. The residual LEP funding of £0.240m could contribute towards the construction of the Highway Bridge across the central green corridor. All of the funding figures are in 2014 prices.

4.3.3 In terms of funding cover for the project, committed funding of £3.700m has been agreed to be spent in the 2015/16 financial year, while the remaining for the future financial years needs to be confirmed with LEP.

4.4 Robustness of Costs

4.4.1 This section provides evidence that the project has been robustly costed. A detailed assessment of the individual items making up the various strands of the project has been carried out when estimating the total costs. The estimates have been built up using a range of relevant information, including knowledge of the market, recent trend in similar costs, evidence and lessons learned from previous, similar projects delivered by the developer.

4.5 Risk Management Strategy

Key Financial Risks

4.5.1 A Risk Register and Quantified Risk Assessment, has been developed to identify the range of cost risks that could impact on the project and suitable mitigation measures to manage them. The key cost risks that have been identified are outlined in Table 4.3.

Risk Details			Impact Type			Assessment		Response	
Risk Title	**Risk Description**	**Risk Owner**	**Financial**	**Commercial**	**Management**	**Likelihood**	**Impact**	**Strategy** (*Avoid, Transfer, Manage, Escalate, Accept)*	**Mitigation status**
Planning risk	Associated with securing planning permission within the desired and programmed timescales for the bid.	NW Consortium	✓	✓	✓		Medium	Avoid	Discussions between the North Whiteley Consortium and the LPA in hand in order to determine the outstanding matters to be resolved in advance of a planning submission.
Weather risk	Delays in construction brought about by inclement weather.	NW Consortium	✓		✓		Low	Manage	Construction programme to be reviewed and risk assessment undertaken.
Cost risk	Costs could rise beyond those identified in the outline construction programme.	NW Consortium	✓		✓		Low	Manage	Cost estimates are robust.
Ecology Mitigation and Relocation Works risk	This may have the effect of increasing the overall budgets and potentially delaying the start of elements of construction work.	NW Consortium	✓	✓			Low		The programme and costs associated with the ecology mitigation and relocation works have yet to be confirmed within the draft Option 2 construction programme. The Ecological Mitigation and Relocation works strategy has been mapped in draft and included into the draft construction programme. Further work is required but the initial view is that some of the construction works may be delayed in some cases by a month or two in order to achieve a cleared site for construction mobilisation.

Risk Details			Impact Type			Assessment		Response	
Risk Title	**Risk Description**	**Risk Owner**	**Financial**	**Commercial**	**Management**	**Likelihood**	**Impact**	**Strategy** (*Avoid, Transfer, Manage, Escalate, Accept)*	**Mitigation status**
Design, technical approval and tender process risk	The programme assumes that the design, technical approval and works tender process can be achieved within a 7 month overlapping period requiring all agencies to work together. Normal programming would allow 4 months for each item giving a 12 month programme.	NW Consortium	✓	✓			Medium /High		Design work will be required to be undertaken following the signing of contracts between the LEP and the North Whiteley Consortium in February 2015. Technical approval processes will need to be streamlined to achieve approved design drawings for tender. The tender process will need to be fully understood with contractors or an approved contractor ready to mobilise and start on site in line with the programme. An updated and more detailed construction programme is required and is currently being prepared in order to reflect the above identified risks.

Table 4.3 Risk register

Processes and Procedures for Managing Risk

4.5.2 The key risks have been identified and included in the risk register. The Consortium will continue to monitor and update on a regular basis. As part of this review exercise, if any risks are considered to potentially have a material impact on the finance or delivery programme, a plan will be developed and tailored to ensure any impacts are mitigated at the earliest opportunity.

5 Commercial Case

5.1 Commercial Viability

5.1.1 The North Whiteley Consortium (NWC) has completed a development viability exercise the results of which have been shared with the local planning authority Winchester City Council. The NWC have extensive experience of the land development process, the risk assessment process and the assessment of the commercial viability of large scale residential and mixed use development.

5.2 Proposed Procurement Strategy for Design and Construction

5.2.1 The NWC will be submitting an outline planning application for the development of 3,500 dwelling and associated supporting land uses and facilities with a detailed application covering the strategic on-site highway infrastructure comprising, Whiteley Way, Bluebell Way and Curbridge Way. **This approach is designed to facilitate an earliest implementation of the permitted scheme in then enabling residential housebuild works.** In addition off-site highway improvements are proposed and have been designed to concept level. All proposed highways works have been submitted for prior technical concept approval to Hampshire County Council and the Highways Agency (Highway Authorities).

Requirements in Terms of Outcomes and Outputs

5.2.2 The NWC will aim to achieve the delivery of the highway infrastructure as set out within the business case within the identified programme and budgets.

Procurement/Purchasing Options

5.2.3 The NWC will appoint a Project Manager to manage the design, technical approval, tender and construction of the on-site and off-site highway works. The Project Manager will following technical approval of the on-site and off-site highway works procure through a competitive tender process a contractor to implement the approved works to the satisfaction of the highway authorities.

Options for Sources of Provision of Services to Meet the Business Need

5.2.4 The NWC and the Project Manager will using their extensive experience to source such services as will be necessary to meet the required deadlines bearing in mind the risks as identified within the business case.

5.3 Contract Management

Contract Type

5.3.1 It is anticipated that the contract will be NEC (Option A). The benefits of this approach are:

- Ensures good relationships between parties within the contract;
- Has been proven to deliver time and cost savings and improve quality;
- Clear and simple document, uses straightforward language and is simple and understood;
- Facilitates the implementation of sound project management principles and practices.

Key Contractual Clauses

5.3.2 Information at this level of detail is not currently known and will be developed in partnership between the LEP and the Consortium in due course.

Risk Sharing Arrangements

5.3.3 Information at this level of detail is not currently known and will be developed in partnership between the LEP and the Consortium in due course.

Pricing and Payment Mechanisms

5.3.4 Information at this level of detail is not currently known and will be developed in partnership between the LEP and the Consortium in due course.

5.4 Risk Management Strategy

Key Commercial Risks

5.4.1 See risk register included in section 4.5

Processes and Procedures for Managing Risk

5.4.2 See risk register included in section 4.5.

6 Management Case

6.1 Project Management

6.1.1 Key elements of the project management role, structure and responsibilities have been set out below:

- The Developers will be bound together by a Collaboration Agreement;
- The Developers will have their own Project Board and will delegate operational responsibilities to a representative Steering Group;
- The Developers will collectively appoint an independent Project Manager who will chair meetings of the Steering Group;
- The Steering Group advised by the Project Manager will be responsible for decision making as relates to the Works;
- The Project Manager will procure the Works Packages and will administrate and supervise the Works;
- In this instance, the Project Manager will be charged with ensuring full and transparent liaison with SEP as regards the procuring, appointment, progressing and costs reporting of the Works packages to the Works the subject of the SEP grant funding;
- The Developers of the residential parcel works will be responsible for adherence to prescribed Site Rules managed by the Project Manager.

6.2 Project Plan

6.2.1 The project plan has been drafted and will continue to be updated on an ongoing basis as the project progresses and more information becomes available. The project plan includes key details comprising:

- Key milestones;
- Dates;
- Targets/Desired outcomes;
- Critical dependencies.

6.3 Risk Management

6.3.1 A scheme risk register has been developed and is included within the Financial Case – see section 4.5. Within the register risks have been identified separately that may impact on finance, commercial and management. For example, planning risk, weather risk and cost could all impact on the management and delivery of the project. However, a risk strategy has been developed to minimise and mitigate potential future risks

6.4 Monitoring and Evaluation

Benefits Realisation Strategy

6.4.1 Monitoring and evaluation of any project is an important step, this is particularly the case with major projects which command large levels of public and private finance. The monitoring and evaluation of the package of measures which have been proposed as part of the development at North Whiteley will be particularly important to ensure benefits are realised. As such, the evaluation plan has been developed to not only monitor progress of development, but also assess and track the realisation of benefits which can be linked to the development.

Objectives

6.4.2 The Strategic Case sets out how the proposed scheme contributes to housing and transport objectives across the region. Given the nature of the development we do not feel it appropriate to consider a new set of objectives but rather work towards local, regional and national objectives. We do suggest one overarching high level objective as follows:

"To design and build a value for money solution to provide a transport link which will then support and facilitate a 3,500 housing development north of Whiteley. The development will contribute to the local housing supply required as set out within the local plan and provide appropriate levels of affordable housing."

Evaluation Plan

6.4.3 As noted above, an evaluation plan will be developed to monitor how benefits of the package of measures proposed at North Whiteley will be realised. Importantly, data will be monitored using before and after data.

6.4.4 In considering an appropriate monitoring and evaluation plan, direction has been taken from the document, "Guidance for transport impact evaluations - Choosing an evaluation approach to achieve better attribution. 2010 prepared by the Tavistock Institute with Aecom. Whilst the plan is currently at an early stage, we have prepared an outline which selects various Key Performance Indicators. We would expect that through discussion between Solent LEP, the DfT and scheme sponsors, this outline approach can be developed into an evaluation framework which is acceptable to all parties.

6.4.5 Importantly, the KPI's and approach selected make use of existing monitoring mechanisms set out within both the Winchester Local Plan and the Hampshire Local Transport Plan. This approach not only ensures consistency between objectives and monitoring regimes across key strategic documents, but also allows efficiencies to be realised by utilising available and approved monitoring data.

6.4.6 The monitoring scheme as set out is deliberately high level with a view that these can be refined through discussion with scheme promoters and appropriate authorities.

Target/Direction	Indicator	Indicator Source	Policy
3,500 dwellings of which 40% affordable	Net additional dwellings. Monitored in relation to trajectory following SH3 % of affordable dwellings	WCC/HCC WCC – Strategic Housing	Winchester Local Plan
Community facilities & infrastructure	Progress in relation to IDP and planning permissions		Winchester Local Plan
Pre-school facilities, 2 new primary schools and a secondary school	Education requirements proposed and delivered	HCC WCC – planning permissions/ obligations	Winchester Local Plan
Minimise demand on transport network and improve quality of access	Travel Plans for major developments.	Winchester County Council Planning Obligations Data	Winchester Local Plan
Work towards aims of the Hampshire Local Transport Plan (LTP) and Winchester Town Access Plan (WTAP)	Implementation of measures within LTP and WTAP from planning permissions	WCC – Planning Obligations data WCC/HCC – monitoring of LTP & WTAP actions	Winchester Local Plan
Reduce distances travelled to work	Distances travelled to work	HCC, ONS, Census data	Winchester Local Plan
Increase use of sustainable modes for school trips	Mode of travel to school	HCC	Winchester Local Plan
Increase use of non-car modes	% of passenger share on public transport	HCC	Winchester Local Plan
To measure journey reliability in terms of average total vehicle delay (hours) on both Whiteley Way and Junction 9 of the M27 during the morning and evening peak periods	Journey reliability and vehicle delay (hours)	JT Surveys, queue length counts	Hampshire LTP

Table 6.1 Targets and indicators for monitoring and evaluation