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# Horsham Housing Delivery Study

Horsham District Council

Final Report

Iceni Projects Limited on behalf of  
Horsham District Council

September 2020

ICENI PROJECTS LIMITED  
ON BEHALF OF HORSHAM  
DISTRICT COUNCIL

## **Iceni Projects**

London: Da Vinci House, 44 Saffron Hill, London, EC1N 8FH  
Glasgow: 177 West George Street, Glasgow, G2 2LB  
Manchester: 68 Quay Street, Manchester, M3 3EJ

**t:** 020 3640 8508 | **w:** [iceniprojects.com](https://www.iceniprojects.com) | **e:** [mail@iceniprojects.com](mailto:mail@iceniprojects.com)  
**linkedin:** [linkedin.com/company/iceni-projects](https://www.linkedin.com/company/iceni-projects) | **twitter:** @iceniprojects

**Horsham Housing Delivery Study**  
HORSHAM DISTRICT COUNCIL

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## APPENDICES

### A1. STRATEGIC SITE PROFORMAS

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## 1. EXECUTIVE SUMMARY

- 1.1 Horsham District Council has commissioned Icení to prepare a Housing Delivery Study to inform the consideration of how much housing provision to plan for through the Local Plan Review. This is against a context in which there is an unmet housing need from a range of neighbouring areas and the Council needs to consider how much of this it can accommodate, where it can do so in a sustainable way, supported by infrastructure, whilst ensuring that its Local Plan is deliverable. This is an issue which the Council needs to address if the Council is to meet its legal obligations through the Duty to Cooperate and for the Plan to be found sound at Examination.
- 1.2 The Horsham District Planning Framework was adopted in 2015. It sets out a housing requirement for 800 dpa over the 2011-31 plan period. This Plan includes provision for 3,000 homes (150 dpa) to meet the unmet housing needs of Crawley over the period to 2031. However the combined unmet need arising from surrounding authorities is significantly greater than this, potentially equivalent to over 35,000 homes over a 15 year plan period.
- 1.3 Horsham District's Local Housing Need, measured using the standard methodology, is for 965 dpa. In the Horsham District Local Plan Regulation 18 Consultation in Spring 2020, the Council has set out a need to test whether the Local Plan Review housing requirement should be set at 1,000, 1,200 or 1,400 homes a year with the higher figures accommodating higher levels of unmet housing needs. This report tests what level of housing provision might be realistic from a market capacity perspective.
- 1.4 Historical housing delivery rates in Horsham have been increasing in recent years, influenced by plans which have set out higher housing targets. Housing delivery over the last 5 years has averaged 1,028 dpa. Horsham District has seen stronger growth in its housing stock than other authorities in West Sussex reflecting relatively a combination of relatively strong housing market characteristics and limited strategic development constraints. Icení's benchmarking of rates of growth in housing stock indicates that recent delivery equates to 1.8% per annum growth in the housing stock (2014-19) which puts Horsham's recent housing delivery performance amongst some of the best performing authorities in the greater South East. Our analysis shows that where provision is made in local plans for higher housing targets, this has supported higher housing delivery. Housing delivery is however also influenced by the economic cycle.
- 1.5 The current HDFP trajectory includes an expectation of housing growth at a lower rate of 1.2% pa over the period to 2026 with an average delivery of 925 dpa over the first part of the plan period (2019-26). This is based on sites which are already allocated or have planning consent and is a healthy starting point for preparation of the new plan. Housing delivery from sites already identified begins to drop off thereafter; but the timing of the preparation of the Local Plan Review will address this through allocating additional land for housing.

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## Appraising the Growth Options

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- 1.6 The low growth scenario of 1,000 homes pa proposed by the Council would equate to 1.4% pa housing stock growth over the plan period to 2037 and represents a level of housing delivery which has been achieved, and indeed exceeded, in recent years. The evidence suggests that this would be achievable from a market capacity perspective, with peak years of housing delivery not really exceeding levels which have been achieved in the District in the recent past. The housing delivery rates implied over 5 year periods of up to 1.7% pa all appear realistic against recent delivery. This scenario would however make no substantive contribution to meeting the significant scale of unmet need which arises from surrounding authorities. It is important that the Council therefore tests whether higher housing delivery could be supported, in terms of both market capacity and the ability to deliver supporting infrastructure (and potential impact of this on delivery timings), as part of the plan-making process.
- 1.7 The medium growth scenario of 1,200 homes pa would see development rates over the plan period equivalent to 1.6% per annum stock growth in Horsham District. This is at the higher end of the spectrum relative to other comparator areas. It is below housing delivery rates achieved in Horsham District over the 2014-19 period at 1.8% pa albeit that this period does not cover a full economic cycle. It is a level which Iceni consider could be supported from a market capacity perspective given the characteristics of the District's housing market, in that this is a relatively high value market; it is surrounded by a number of more constrained areas where the wider sub-region; and there is a relatively strong economic growth potential at a district and sub-regional level. It would need to be planned for in a comprehensive way through the Local Plan Review process and see growth at a range of locations across the District.
- 1.8 The higher growth scenario for delivery of 1,400 homes pa would imply a need to sustain an average housing delivery rate of 1.9% pa over an 18 year period. These levels of delivery are at the top end of the range of what other districts within the wider South East have achieved historically over shorter timescales; but we find no substantive evidence that this level of housing delivery could be supported over a full 18 year plan period over a full housing market and economic cycle. The evidence thus suggests that this scenario is likely to overly-ambitious and there would be clear delivery risks associated with achieving it.
- 1.9 Prior to the onset of the Covid-19 pandemic, Iceni considered that provision of an average of 1,200 – 1,300 homes per annum would have been the maximum achievable from a market capacity perspective. This would have represented a rate of housing delivery of 1.6 – 1.8% per annum.
- 1.10 The Covid-19 pandemic is expected to affect housing delivery in the short-term both through directly affecting construction and through effects on the economy and housing market confidence more widely. Taking this into account, based on the current information Iceni consider that housing delivery

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of between 1,150 – 1,250 dpa on average is likely to be achievable from a market capacity perspective over the plan period to 2037, equivalent to a growth rate in housing stock of 1.6 – 1.7% per annum. Recognising that at the time of writing we are still in the early stages of the pandemic, the Council may consider reviewing this further prior to the submission of the Plan when there is greater understanding of the economic and housing market impacts.

- 1.11 These conclusions are based on considering issues of market capacity. As the Council draws together a range of evidence through the Local Plan Review, it may find issues associated with the infrastructure capacity – including in terms of strategic transport and utilities infrastructure. Infrastructure capacity and the lead-in time to deliver infrastructure improvements may influence the scale of growth which can be sustainably accommodated or moderate the pace at which development can be achieved, which in turn influence what housing requirement is ultimately deliverable over the plan period.

### **Contribution from Strategic Sites**

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- 1.12 Iceni's analysis has considered the strategic site options put forwards in Sustainability Appraisal which was prepared alongside the Regulation 18 draft Local Plan and assessed the potential lead-in time and build out-rate based on the information currently available. Based on this, there are a number of sites where Iceni considers the yield over the plan period to be lower than set out within the SA options and one option where it could be higher. These are shown in the table below. If these sites are taken forward, it is reasonable to expect the build-out of them to continue beyond 2037.

**Table 1.1 Assessment of Potential Supply from Key Sites over the Plan Period**

	<b>Option</b>	<b>Iceni expected supply within plan period to 2037</b>
<b>West of Ifield</b>	3000	2800
<b>West of Southwater</b>	1200	820
<b>Adversane</b>	2000	2,100
<b>Land north-east of Henfield</b>	2000 - 3000	1,850
<b>Land at Buck Barn, West Grinstead</b>	2000-3000	2,100

- 1.13 The implications of this is that a number of the spatial options on our assessment deliver less homes over the plan period than the Council has originally anticipated. Iceni would recommend that the Council consider whether there are additional deliverable smaller, non-strategic sites in sustainable locations which could be included within the land supply to address this and ensure a sufficient supply-side buffer.

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### **Supply-side Flexibility**

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- 1.14 A distinction needs to be drawn between the housing requirement and how much land would need to be allocated within the Local Plan Review. It will be necessary to identify a portfolio of sites with capacity over the plan period for a higher level of housing delivery than the housing target, as there is a need to ensure that there is some flexibility within the land supply to ensure that the Plan is deliverable over the plan period.
- 1.15 It is common therefore to see local plans which included a supply of land (as contained within a housing trajectory) which can be built out over the plan period which is 10% or more above the minimum housing requirement figure, in order to provide a level of flexibility to ensure that the plan is able to accommodate slippage or slower delivery of some sites than originally anticipated without the planning policy framework being rendered out-of-date by virtue of a lack of five year housing land supply or under-performance against the Government's Housing Delivery Test.
- 1.16 In considering the appropriate contingency provision to make, the Council will need to take account of the nature of the spatial strategy taken forwards and risks to the delivery of key sites therein. Icení considers that as a preferred strategy emerges, the Council undertakes some scenario testing to explore for instance the implications of a delay in delivery of key strategic sites and implications which this would have on the ability to meet the housing requirement over the plan period and maintain a 5 year housing land supply.
- 1.17 The Council will also need to be able to demonstrate that a five year housing land supply exists at the point of adoption (with a suitable buffer) and that it is able to maintain a rolling five year land supply over time. The Council's existing base trajectory sees relatively strong housing delivery over the initial years of the plan period, but if a housing requirement of substantively above 1000 homes pa is set, there is the potential for this to result in a shortfall. The Council will need to be able to demonstrate at a local plan examination that it has carefully considered the options to rapidly increase housing delivery to address this, and small sites of < 200 homes (including schemes of less than 70 homes which can be brought forward within a single phase) which do not require substantial infrastructure will be important in enabling it to do so. These issues will need to be balanced against wider sustainability considerations in determining the appropriate development strategy.

### **Localised Market Capacity Issues in different parts of the District**

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- 1.18 Icení's analysis indicates that the Council should be mindful of over-concentrating development in certain areas but in doing so should take account of the pace of development expected not just in parts of Horsham District, but in surrounding areas.
- 1.19 The northern part of the District includes Horsham, the District's main town, transport connections to Crawley, Gatwick and London and a concentration of existing economic activity and services. It is

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reasonable to therefore expect this area could sustain growth rates above the District average. Iceni's analysis indicates that most of the growth options for this area are realistic; however the scale of growth implied in Options 6 (in which all potential strategic sites are allocated) and 7 (all strategic urban extensions and significant additional growth from smaller sites) (as set out in the Sustainability Appraisal) in this sub-market is likely to be overly ambitious and unrealistic.

- 1.20 The south of the District is more rural in nature and the level of housing growth envisaged is modest in most scenarios. Completions in this area over the 2011-19 period have averaged 163 dpa (with 167 dpa achieved over the last 5 years). This is however within a context whereby the Council's existing planning strategy focuses development in the North Horsham sub-market and should not therefore be necessarily seen as a cap on future development rates. Given the relative rurality of this area, sustaining delivery of over 200 dpa would be more challenging but would not necessarily be unreasonable, particularly where strategic development sites are being built out.
- 1.21 In the west of the District around Billingshurst, the options imply a scale of growth in this area which could vary from 1.3% pa in those options which see growth East of Billingshurst, which is a rate of housing delivery which is similar to the trend in recent years; through to 2.4% pa growth sustaining annual housing delivery of on average 240 dpa in Option 3b in the Sustainability Appraisal in which growth comes forward both East of Billingshurst and at Adversane. In this latter scenario housing delivery rates peaking at around 350 dpa would need to be sustained over a number of years. Historically there has been a limited employment driver in this area but there are indications that this may change in the short-term through delivery of the Billingshurst Trade Park.
- 1.22 If growth at East of Billingshurst and at Adversane are both included within the Plan, Iceni would expect the delivery of development East of Billingshurst to affect the build-out rate at Adversane, particularly over the period to around 2030. If both of these sites are allocated, Iceni would envisage that development at Adversane would be focused post 2029 and achieve c. 1800 dwellings over the plan period as compared with c. 2100 dwellings should the site come forward without East of Billingshurst.

### **Supporting Higher Housing Delivery Rates**

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- 1.23 The report also provides advice on the factors that the Council should consider in seeking to increase rates of housing delivery in the District. These are explored in Section 7 of this report and include the breadth and differentiation of products on strategic sites, the early delivery of key infrastructure which helps to create attractive places, and modern methods of construction. It also addresses how the Council can seek to support recovery in housing delivery in the short-term.

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- 1.24 The report also highlights the potential for the Council to need to deal with planning applications for a number of strategic sites concurrently and the need to carefully consider and address the resource implications of this.

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## 2. INTRODUCTION

- 2.1 Horsham District Council has commissioned Iceni Projects (“Iceni”) to prepare a Housing Delivery Study to inform the consideration of how much housing provision to plan for through the Local Plan Review.
- 2.2 The Council adopted the Horsham District Planning Framework (HDPF) in November 2015. The HDPF included a commitment to commence a review within three years from the date of adoption. The Council has thus commenced a Local Plan Review and has undertaken consultation on Draft Local Plan documents in both April and May 2018 and February and March 2020. The Local Plan Review has a plan period running to 2037.
- 2.3 There are a number of considerations in assessing what level of housing to plan for within the Local Plan Review. These include evidence of the District’s housing needs, unmet housing need from surrounding areas, as well as land availability, environmental and infrastructure capacity and constraints. This report focuses on considering issues of market capacity. The Council will draw together evidence relating to these wider issues, including in respect of the availability of sites and infrastructure capacity, through the plan-making process.
- 2.4 In preparing the Local Plan Review, the Council needs to cooperate effectively with neighbouring authorities. It seems likely that a number of neighbouring authorities which adjoin Horsham District will be unable to meet their housing needs in full within their own administrative areas because of how the boundaries of these areas are drawn or because of strategic development constraints, including national policies which seek to protect the landscape and restrict development within the South Downs National Park. The Horsham Local Plan Review is therefore likely to need to test and appraise whether Horsham District can contribute to addressing unmet needs from neighbouring authorities, in addition to its own local housing need. Issues of unmet housing needs are explored further in Section 3.
- 2.5 National planning policies set out that plans should be informed by agreements with other authorities, so unmet need from neighbouring areas can be accommodated where it is practical to do so and consistent with achieving sustainable development. Horsham District Council needs to approach discussions with its neighbours in a positive and collaborative way if the plan is to be found sound at examination, but must also be confident that the level of development which it plans for through the Local Plan Review is deliverable over the plan period to 2036.
- 2.6 The Council has commissioned Iceni to prepare this Study to explore how much housing could be delivered within the Local Plan Review by considering issues related to market capacity – in essence examining how much housing local markets within the District could potentially absorb. The Study

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considers issues of potential market capacity looking at the District as a whole, as well as considering cross-boundary interactions including the influence of what happens beyond the District's boundaries and how this might affect market absorption in different parts of the District. This will provide one of a number of inputs which the Council can use in deciding how much housing to plan for. Other considerations include discussion with neighbouring authorities, infrastructure constraints and the feasibility of delivering new infrastructure to support development in different locations (including how quickly new infrastructure can be brought forward); and the overarching appraisal of the social, economic and environmental benefits and disbenefits of various options which are assessed through the Sustainability Appraisal process.

2.7 The Council's brief to Iceni is to consider and appraise what the rate of housing growth has been in Horsham District in the past, what current local and national market signals suggest regarding the capacity for growth in the future, and what this indicates regarding the number of homes which could be delivered in Horsham District over the plan period. Specifically, the brief seeks:

- Analysis of the factors affecting housing delivery and rate of growth in the Horsham district including, but not limited to:
  - a. An assessment of the national and local housing market, conditions and dynamics in respect of driving the delivery of housing;
  - b. A review of the historic rate of new housing delivery in the Horsham district, and in comparable areas;
  - c. An assessment of whether the future annual rate of housing growth that may be required to fulfil the strategy can in reality be achieved in the local housing market. The annual rate of growth will be specified in the Local Plan however this number is yet to be determined. Therefore, the study should consider potential scenarios for different levels of development, to be determined in consultation with the Council.
- Recommendations outlining how the risk to delivery can be reduced.

2.8 Iceni's analysis draws on our understanding of the local housing market, which includes work which Iceni has undertaken in preparing a Strategic Housing Market Assessment for Northern West Sussex and engagement of local estate and letting agents in different parts of Horsham's District; and the project team's experience of undertaking similar studies in other areas to inform local plan preparation. It has been informed assessment of the local housing market, the supply dynamics and pipeline within the District and in surround areas, and engagement with selected promoters of strategic sites within Horsham District to understand their expected delivery assumptions. Information provided by site promoters has been critically appraised by the Iceni team.

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- 2.9 The Covid-19 crisis has emerged at a late stage in the preparation of this report, and Iceni has sought to consider and reflect on the implications of this. This is an area which however will need to be reviewed as the plan-making process progresses given the inevitable uncertainty as at May 2020 as to how long the pandemic will continue, the constraints this puts on economic and housing market activity, and the wider impacts on the sub-regional economy.

### **Structure of this Report**

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- 2.10 The remainder of the report is structured as follows:

- Section 3: Policy Context
- Section 4: Housing Market Conditions & Dynamics
- Section 5: Delivery of Strategic Site Options
- Section 6: Potential Future Trajectories for Housing Delivery
- Section 7: Drawing the Evidence Together

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### 3. POLICY CONTEXT

#### **Horsham District Planning Framework**

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- 3.1 Horsham District Council has a track record of developing and maintaining an up-to-date development plan and collaborating effectively with surrounding authorities on meeting development needs. The Council adopted a Core Strategy in 2007. It progressed a Joint Area Action Plan (JAAP) for strategic development within the District on the western side of Crawley (now known as Kilnwood Vale) with Crawley BC, adopting the JAAP in July 2009. It has then prepared the Horsham District Planning Framework which was submitted for examination in August 2014 and adopted in November 2015.
- 3.2 The Horsham District Planning Framework (HDPF) provides for development needs in those part of the District which fall outside of the South Downs National Park (SDNP). Policy 15 within the HDPF makes provision for at least 16,000 homes and associated infrastructure over the period from 2011-2031, equivalent to an annual average of 800 homes per annum.
- 3.3 The HDPF housing target was made up of the District's objectively assessed housing need (OAN) of 650 dwellings per annum, plus a contribution to meeting the identified unmet needs of Crawley of 150 dwellings per annum.
- 3.4 The OAN figure was based on the 2015 *Housing Need in Horsham District* report prepared by consultancy GL Hearn using the methodology set out in the 2012 National Planning Policy Framework (NPPF) and associated 2014 Planning Practice Guidance (PPG), both of which have since been updated.
- 3.5 Crawley's housing needs were assessed at that time on a similar basis, the evidence identifying Crawley's OAN as 675 dpa. Crawley's borough boundary is drawn tightly around its urban area such that it could only make provision for equivalent of 334 dpa within the Crawley 2030 Local Plan (adopted in Dec 2015), resulting in an unmet need of 340 dpa. The Inspector examining the HDPF considered it appropriate that Horsham should meet just under half of Crawley's unmet housing need. Mid Sussex's Local Plan has since made provision for most of the remainder of Crawley's unmet need.
- 3.6 In numbers terms, it is important to therefore recognise that HDC has already committed to providing for equivalent of 3,000 homes (150 dpa) to meet unmet needs from Crawley over the period to 2031.
- 3.7 The HDPF identifies a number of strategic sites within the District, the planning and development of which is now progressing. These comprise:

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- North of Horsham – at least 2,500 homes
  - West of Southwater – around 600 homes
  - South of Billingshurst – around 150 homes.

3.8 In addition, provision of 475 homes East of Billingshurst which was permitted before the Council submitted the HDPF for examination. The previous 2007 Core Strategy had identified strategic development locations at Kilnwood Vale (to the west of Crawley) and Broadbridge Heath.

3.9 These existing commitments, outstanding allocations and other sites for which there is extant planning consent for development have fed into a baseline housing trajectory within this report. The Local Plan Review is considering what additional development can be accommodated in the District, particularly in the latter years of the current plan period and the longer-term period from 2031 (the end point of the current HDPF) to 2037.

### **National Planning Policy Framework**

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3.10 The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England. It is of direct relevance to the preparation of Horsham's Local Plan Review as to be 'sound' (and thus capable of adoption), the plan will need to be consistent with national policies within the NPPF and in particular to meet the four soundness tests described in Paragraph 35 within it.

3.11 NPPF Paragraph 35 states local plans are examined to assess whether they have been prepared in accordance with legal and procedural requirements and whether they are sound. Plans are sound if they are:

- a) **Positively prepared** – providing a strategy which, as a minimum, seeks to meet the area's objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;
- b) **Justified** – an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence;
- c) **Effective** – deliverable over the plan period, and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and
- d) **Consistent with national policy** – enabling the delivery of sustainable development in accordance with the policies in this Framework.

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- 3.12 Para 59 sets out the Government's objective of significantly boosting the supply of homes. The starting point is that a Plan should seek to meet its objectively assessed development needs where it is sustainable to do so. For housing, this means meeting – as a minimum – Horsham District's local housing need as assessed using the standard method set out in Planning Practice Guidance Paragraph 60 of the NPPF states that:

*“To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.”*

- 3.13 Paragraph 65 sets out that strategic policy-making authorities should establish a housing requirement figure for their whole area, which shows the extent to which their identified housing need (and any needs that cannot be met within neighbouring areas) can be met over the plan period. Any unmet need would thus be included within Horsham's housing target within the Local Plan Review, against which the District would need to be able to demonstrate that it could maintain a five year housing land supply.
- 3.14 Horsham District's local plan area is relatively free of strategic development constraints, particularly in comparison to a number of surrounding authorities where a substantive proportion of their area is covered by either the South Downs National Park, the High Weald Area of Outstanding Natural Beauty, Surrey Hills Area of Outstanding Natural Beauty or Green Belt or subject to other nationally-significant development constraints. These, together with the geography of Crawley's borough boundary, contribute to unmet housing need pressures from neighbouring local authorities.
- 3.15 In preparing the Local Plan Review, there is a legal requirement for Horsham District Council to cooperate with neighbouring authorities. The Planning and Compulsory Purchase Act 2004 (as amended) places a legal duty on the Council to engage constructively, actively and on an ongoing basis with other local planning authorities and public bodies to maximise the effectiveness of local plan preparation in the context of strategic cross boundary matters. In a Sussex context, unmet housing needs would be a strategic cross boundary issue in these terms.
- 3.16 Through the 2019 NPPF, the Government has sought to strengthen the policy framework around meeting unmet housing needs (against a context of concerns regarding how effective the duty to cooperate has been in doing so). The Duty to Cooperate is considered in Paras 25 and 26 in the NPPF. The soundness tests require strategic matters (such as unmet needs) to be “*dealt with rather than deferred*” with the expectation that this is evidenced by Statements of Common Ground between authorities. For a plan to be sound, unmet needs from neighbouring authorities are expected to be

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accommodated “*where it is practical to do so and is consistent with achieving sustainable development.*” But alongside these Statements, a Plan needs to be “*deliverable*” if it is to be sound. In essence this means that there is a realistic prospect that the level and pace of development required could be achieved. This will be influenced by the market capacity issues considered in this report; but also by the feasibility and timing of delivering the infrastructure necessary to make development sustainable.

- 3.17 It would not constitute sustainable development to set housing targets so high that they were unrealistic and could not be achieved, as the result would be planning to frustrate (and work against) the ‘plan-led’ system of development advocated in the NPPF (Para 15). Equally where development cannot be supported by the timely delivery of infrastructure, this would not constitute sustainable development.
- 3.18 Councils must demonstrate how they have complied with the Duty at the independent examination of their Local Plans. If a local planning authority cannot demonstrate that it has complied with the Duty, then the Local Plan will not be able to proceed further in examination. Iceni notes that there are two South East local planning authorities which have recently failed the Duty to Cooperate legal test.<sup>1</sup>
- 3.19 In the context of housing supply, Para 67 requires plans to identify a supply of specific deliverable sites for years 1-5 of the plan period; and specific developable sites or broad locations for growth for years 6-10 and where possible years 11-15 of the plan.
- 3.20 Paragraph 73 of the NPPF gives regard to maintaining supply and delivery of homes. It states strategic policies should include a trajectory illustrating the expected rate of housing delivery over the plan period, and all plans should consider whether it is appropriate to set out the anticipated rate of development for specific sites. It also set out requirements for the Council to identify (and update annually) a five year housing land supply. The realism of the trajectory, and whether a five year land supply will exist at the point of adoption, is often considered at Local Plan examinations.

### **Horsham’s Local Housing Need**

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- 3.21 The Government has implemented this standard methodology for assessing local housing need which (at the current time) takes 2014-based Household Projections to calculate average annual household growth over the next 10 years and then applies an upward adjustment based on the latest

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<sup>1</sup> Wealden and Sevenoaks

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median house price to earnings ratio. A cap is applicable in some circumstances but does not affect the figures for Horsham.

- 3.22 The local housing need (LHN) in Horsham District has been considered in the 2019 Northern West Sussex Strategic Housing Market Assessment. This was prepared by a consultancy team led by Icen. It defines a local housing need in Horsham District of 965 dwellings per annum (dpa) and of 2,819 dpa across the Northern West Sussex Housing Market Area. This is made up of the local authority areas of Crawley, Horsham and Mid Sussex. The relevant calculations, based on the data available at the time of preparation of the SHMA, are set out below.

**Table 3.1 Standard Method Housing Need Calculations**

	<b>Crawley</b>	<b>Horsham</b>	<b>Mid Sussex</b>
Households 2019	47,386	59,734	63,348
Households 2029	53,083	65,706	70,489
Change in households	5,697	5,972	7,141
Per annum change	570	597	714
Affordability ratio (2018)	9.11	13.86	12.69
Affordability uplift to household growth	32%	62%	54%
Total need (uncapped)	752	965	1,102
<b>Minimum Local Housing Need</b>	<b>752</b>	<b>965</b>	<b>1,102</b>

- 3.23 The Horsham District LHN figure has since dropped to 920 dpa based on the latest data, taking account of household growth (2020-30) and in particular an improvement in the median house price to earning ratio to 12.87 based on the latest affordability ratios published by ONS in March 2020.<sup>2</sup> The Council's housing need figure can be influenced by changes in data up to the point of submission of its Local Plan.
- 3.24 Whilst Planning Practice Guidance in Para 2a-010 sets out circumstances where an area's LHN may be higher than the standard method, the SHMA does not find this to be justified in Horsham's specific circumstances based on the current evidence and Government methodology.
- 3.25 The Government has announced in March 2020 that it intends in due course to review the formula for calculating Local Housing Need, encouraging greater building within or near to urban areas and making sure that at a national level we are planning for delivery of Government's target for delivery of 300,000 homes per year. The timescales associated with consulting on and then implementing a revised approach to calculating housing need are however currently unclear. This is therefore

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<sup>2</sup>

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian>

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something which will need to be kept under review as the preparation of the Local Plan Review continues.

### **Unmet Housing Need in Neighbouring Areas**

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- 3.26 There are currently identified or potential issues of unmet need arising from a range of authorities which neighbour Horsham District which principally reflect the strategic constraints identified above.
- 3.27 The precise quantification of unmet need has been made more complex by the change in the methodology for how housing need should be calculated, as effected by the revisions to the NPPF in 2018/19 and updating of the associated Planning Practice Guidance. On this basis, Icení's approach has been to assess unmet housing need using:
- a. Figures quoted in adopted plans/ the associated inspector's reports; and
  - b. Comparisons between adopted plan requirement figures (on a dpa basis) and the latest LHN.
- 3.28 This figures will need to be kept under review over time and may evolve before the point of submission of the Horsham Local Plan Review. For the purposes of this report, it is not necessary to precisely quantify unmet need. It is however helpful to provide an indicative analysis to understand the scale of potential unmet needs which exist in neighbouring authorities.
- 3.29 The table below identifies that of the surrounding authorities, there has been an unmet need identified in adopted plans in Adur, Brighton and Hove, Chichester and Crawley. Collectively the unmet need from these individual authorities equates to c. 1405 dpa, against which plans in Horsham and Mid Sussex have made provision for c. 365 dpa, and Arun 81 dpa leaving 960 dpa outstanding. This is based on needs assessments which used the 2012 NPPF/ PPG methodology. In addition to this, there is likely to be an unmet need arising in Worthing.
- 3.30 Of those authorities with a declared unmet need in adopted plans, we understand that Chichester District is currently proposing to meet its needs in full through its local plan review; but it seems unlikely that a number of other authorities will be able to do so. Both Chichester and Crawley have local plan reviews underway.

**Table 3.2 Unmet Need identified through adopted Plans**

<b>LPA</b>	<b>Local Plan Status</b>	<b>OAN</b>	<b>Contribution to Unmet Need</b>	<b>Housing Requirement</b>	<b>Unmet Need arising from Area</b>
<b>Adur</b>	adopted Dec 2017	325	0	177	148
<b>Arun</b>	adopted July 2018	919	81	1000	0
<b>Brighton &amp; Hove</b>	adopted Mar 2018	1506	0	660	846
<b>Chichester</b>	adopted July 2015	505	0	435	70
<b>Crawley</b>	adopted Dec 2015	675	0	334	341
<b>Horsham</b>	Adopted	650	150	800	0
<b>Mid Sussex</b>	adopted Mar 2018	876	214	1090	0
<b>Mole Valley</b>	in preparation	-	0	449	-
<b>Worthing</b>	in preparation	-	0	246	-
<b>Total</b>			<b>445</b>	<b>4391</b>	<b>1405</b>
<b>SDNP</b>	adopted July 2019	447	0	250	197

*Source:* Iceni analysis ('in preparation' figures are subject to change as plan preparation progresses)

- 3.31 The South Downs National Park Authority also has a declared unmet need, but this needs to be treated with caution as it is likely to overlap (rather than being fully additional) to those for individual local authorities based on how the evidence for different areas was developed. The unmet need arising from that part of the National Park which falls within Horsham District is negligible at c. 6 dpa based on the Park authority's current evidence and adopted Plan.
- 3.32 If needs figures are updated to reflect the standard method LHN (based on data as at February 2020), a significantly higher need is shown resulting in a potentially growing unmet need. Whilst there are some areas where there might be opportunities to increase housing provision to meet the higher need, there are likely to be some authorities – such as Adur, Brighton and Hove, Crawley and Worthing – where the opportunities to increase supply are more limited. For these four authorities alone, the scale of unmet need based on current evidence is of 2,365 homes a year which would be equivalent to over 35,000 homes over a 15 year period.

**Table 3.3 Notional/ Indicative Comparison on adopted/emerging housing targets against LHN**

	<b>Housing Requirement (pa)</b>	<b>LHN (2019, pa)</b>	<b>Unmet Need against LHN (pa)</b>
<b>Arun</b>	1,000	1,326	326
<b>Worthing</b>	246*	880	634
<b>Adur</b>	177	432	255
<b>Brighton &amp; Hove</b>	660	1718	1,058
<b>Mid Sussex</b>	1,090	1,102	12
<b>Chichester</b>	435	746	311
<b>Crawley</b>	334	752	418
<b>Mole Valley</b>	449*	449	0
<b>Total (indicative)</b>	4,391	7,405	3,014

Source: Icen analysis (housing requirement figures for authorities with emerging plans including Crawley, Chichester, Mole Valley and Worthing could change as plan preparation progresses). Housing requirement figures used from emerging plans are indicated with a star.

- 3.33 The precise figures for unmet need from neighbouring authorities are likely to change over the period to submission of Horsham's Local Plan Review. For the purposes of this report, it is clear that a substantial scale of potential unmet need exists and the potential scale of unmet need from Crawley and from the Sussex Coast provide a strong basis for the testing through the preparation of the Local Plan Review the potential for Horsham District to make some contribution to meeting unmet housing needs through the Duty to Cooperate.

### **Accelerating Housing Delivery**

- 3.34 Central Government's view is that we have not been building enough homes in England, and that we need to be doing more. This is important in the context of this report as it means **that housing delivery rates over recent years cannot be treated as an absolute cap on what might be achieved in the future.**
- 3.35 The Government published its Housing White Paper in February 2017.<sup>3</sup> This paper identified the need to deliver between 225,000 to 275,000 homes per year to keep up with population growth and start to tackle years of under-supply. However, the House of Lords Select Committee<sup>4</sup> has concluded that at least 300,000 new homes will be needed annually for the foreseeable future to address the 'housing crisis' and the previous Government identified its intention to increase housing delivery to

<sup>3</sup> DCLG (Feb 2017) *Fixing our broken housing market*.

<sup>4</sup> House of Lords Select Committee on Economic Affairs (July 2016) *Building more homes*

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this level by the mid 2020s. This level of delivery has not been achieved since the 1960s and is a national challenge.

- 3.36 The Housing White Paper places emphasis on the need to significantly boost the supply of housing at a national level which sets out a range of policy measures to 'build homes faster'. It identifies that there is no single 'silver bullet' to increasing housebuilding and action is required on a variety of fronts. The measures set out included making the planning system more open and accessible, improve the co-ordination of public investment in infrastructure, support timely connections to utilities, and tackling unnecessary delays.
- 3.37 The paper also emphasises the need to 'diversify the market' through supporting SME housebuilders, the growth of custom-build and other specific market segments to encourage investment and support for modern methods of construction (MMC). Government's aim within this was to increase the number of organisations building homes and speed up delivery.
- 3.38 A number of these initiatives are already being taken forward. For instance, Homes England have been actively supporting MMC, as highlighted in their Strategic Plan 2018/19-2022/23, published in October 2018. Homes England will seek to boost supply, productivity, innovation; and aim to increase the use of MMC through their Local Authority Accelerated Construction Programme.
- 3.39 Furthermore, Government also is intending to publish a Planning White Paper in the short-term<sup>5</sup>, which may introduce or propose additional reforms. This will need to be taken into account through the Local Plan Review.
- 3.40 Government's Planning for the Future publication indicates that the White Paper will seek to introduce further reforms to speed up the planning system including reforming planning fees, measures to ensure land is build out, expanding the use of zoning tools to support development and improvement to the effectiveness of Compulsory Purchase Orders to facilitate land assembly and infrastructure delivery. These will need to be taken into account through the preparation of the Local Plan Review.

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<sup>5</sup> In early March 2020, Government had indicated that this would be published in 'Spring 2020'

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## 4. HOUSING MARKET CONDITIONS AND DYNAMICS

- 4.1 This section sets out an overview of the housing market conditions and dynamics in Horsham District; as well as at the national level to consider how the dynamics have changed over time. It considers and benchmarks trends in housing supply, as well as appraising house price and sales trends.
- 4.2 Our analysis uses an approach of considering housing delivery in terms of rates of housing stock growth (i.e. what growth in the housing stock is seen per year) as a means of appraising housing delivery between areas of different sizes, and considering what levels of housing delivery performance might be feasible.
- 4.3 The analysis includes qualitative evidence drawn from Icen's engagement with local estate and letting agents in different parts of Horsham District to understand local market dynamics.

### **The National Housing Delivery Context**

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- 4.4 As the NPPF makes clear, the Government's objective is to significantly boost the supply of housing. However it is first helpful to understand historical housing delivery performance.
- 4.5 The Ministry for Housing and Local Government ("MHCLG") publishes data on housing completions by market sector looking back to 1946 at the national level. There is also District level data on housing completions available and published by MHCLG.
- 4.6 But first, it is worthwhile reviewing selected publications which have explored the challenge and barriers to increasing housing delivery. The first publication of relevance is the report issued by the House of Lords' Select Committee for Economic Affairs into *Building more Homes*, published in July 2016. This report set out clearly that there has been consistent under-delivery of homes for many decades, noting at that time of its publication that it had been "*ten years since 200,000 homes (the implied annual rate from the Government's target) were added to the housing stock in a single year*". However, the evidence heard by the Committee, as set out in the report, "*suggests this [200,000 homes] will not be enough to meet future demand and the backlog from previous years of undersupply*". As a consequence, the Committee stated that in order to meet demand and have a moderating effect on house prices, at least 300,000 homes a year need to be built for the foreseeable future. The Committee made it clear that if this delivery rate is not met, house prices will continue to rise due to lack of supply, forcing many families into private rented accommodation, unable to save for the deposit; and the average age of a first time buyer will continue to rise.
- 4.7 In response, the Committee set out a range of recommendations in order to meet this increased housing target. Broadly these recommendations are: in relation to local authority housebuilding, the

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Government should relax the arbitrary limits on how much local authorities are able to borrow to build social housing; and encourage local authorities to innovate, cooperate and enter into partnership with others in the housing sector, to ensure the proliferation of successful schemes. It encouraged the release of public land to support the building of low-cost homes, and on the back of this the requirement to achieve best market value when releasing public land should be relaxed. Finally, in order to gain more planning permissions, the Government should allow local authorities to set and vary planning fees in accordance with needs of the local area; also local authorities should be given the power to levy council tax on developments that are not completed within their set time period, in order to address the issue of the gap between planning permission granted and the number of homes actually built. A number of these issues are being considered by Government and may be taken forwards through the forthcoming Planning White Paper.

- 4.8 A report from the MHCLG Select Committee Inquiry on *Housebuilding Industry Capacity* published in April 2017, is also relevant. The report arrived at the same conclusions regarding the lack of delivery as the House of Lords Select Committee; but looks in greater detail into why there has been consistent under delivery in recent years. It acknowledged that under delivery is influenced by the structure of the homebuilding sector, with private housebuilding dominated by a small number of firms. The eight largest firms build more than half of all new homes, creating an over reliance on a small number of companies; and the report suggested that there is little incentive for these volume house builders to build any quicker, and in fact, it is in their commercial interest to maintain profit rather than build out quickly. This has contributed continued under delivery of homes and also increases the effects of economic cycles (and particularly downturns) on housing delivery. To build quicker the report identifies a need to encourage a far greater mix of developers.
- 4.9 The report sought to consider measures that would support growth of SME builders, including measures to promote identification of small sites (which has since been taken forwards in the revised NPPF) and sub-division of larger sites. It encourages measures to increase SME builders' access to finance. It also sees part of the solution as more homes being built to rent, and a more proactive public sector role in development through involvement of both local authorities and Homes England in acting as a master developer. The Committee also recommended the raising of the HRA borrowing caps (or their removal in some cases where housing affordability is worst) to enable Council housebuilding to increase. The Committee also identified that the potential contribution of self- and custom-build homes is still not as well developed as it could be. These sorts of measures, which increase the breadth of organisations building homes, should equally help to support the recovery of housing delivery from the impacts of the current Covid-19 pandemic and associated anticipated economic recession.
- 4.10 The report did not see Modern Methods of Construction (MMC) on its own as a panacea, but did consider that these could make a significant contribution with in particular modular homes helping to raise build out rates in particular through contributing to addressing skills and labour challenges

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within the construction sector. It made the case for a more active role of Government in supporting growth in MMC and the wider supply chain, and this is something which Homes England has since taken on.

- 4.11 The report identifies issues with the land market, which is particularly tight in high demand areas, and identifies that further consideration might be given to public intervention to incentivise schemes that prioritise long-term community benefits. It identified a growing skills crisis in the construction sector as one of the biggest challenges, and concerns regarding the impact which the UK's withdrawal from the EU could have on this. Construction skills capacity is clearly an issue which could impact housing delivery rates (but this is more appropriately considered at a regional / national level).
- 4.12 Finally, KPMG and Shelter's '*Building the Homes we Need*' report published in 2014, was clear in setting out that the unaffordability of houses is principally due to rising house prices. The report was clear that if action was not taken to build more houses - consequently reducing house prices over the long-term - there would be significant consequences for the UK economy and society. The report set out that these impacts would include rising homelessness, stalled social mobility, declining pension saving and an ever-rising benefit bill. There is clear evidence of negative social consequences, and potential economic consequences, if housing delivery does not increase to match demand.
- 4.13 House price dynamics are influenced by the supply-demand balance and wider macro-economic considerations such as market confidence and interest rates. House prices and price changes are influenced by the supply/demand balance at a local but also at a sub-regional and regional level; implying that action will be needed to increase housing supply both in Horsham District and other areas across the greater South East to improve housing affordability over time. Government policy, and its commitment to deliver 300,000 homes a year from the mid 2020s, is geared to doing this; and through the planning system the Government has set out a framework through which individual local authorities are all expected to contribute to this.

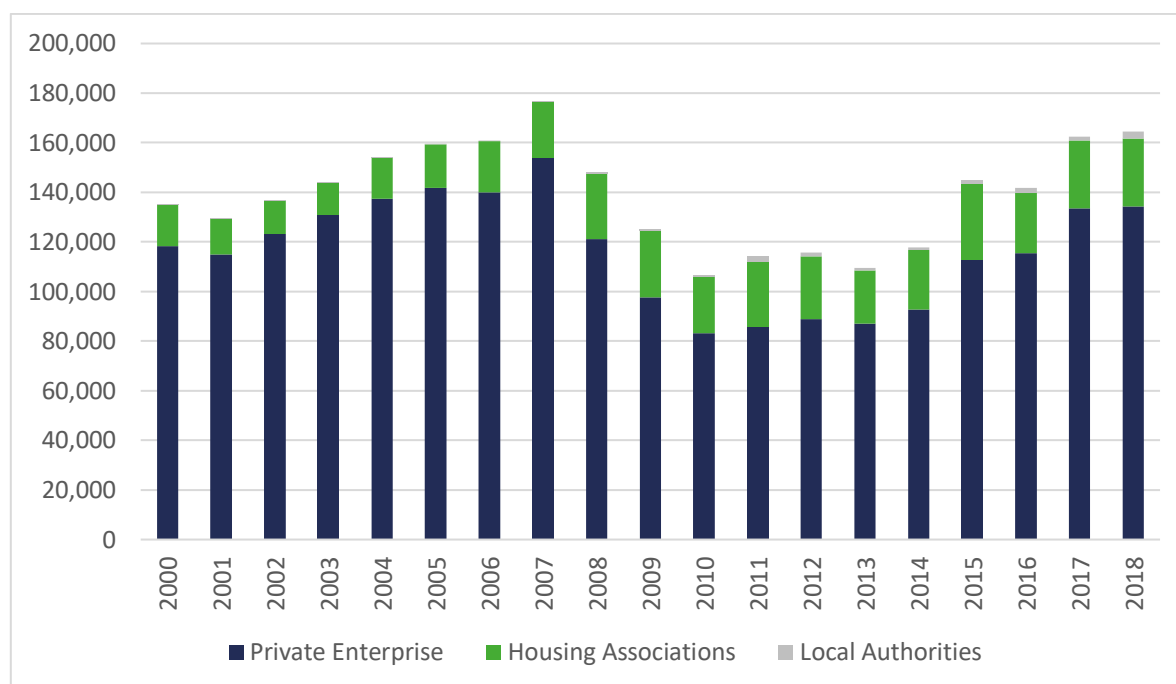
### **The National Housebuilding Trend**

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- 4.14 We move on in this sub-section to consider national trends in housing delivery. The level of housebuilding across England increased year-on-year from 2001 to the peak of the last housing market cycle, increasing from delivery of 129,510 homes in 2001 to 176,640 in 2007 as Figure 3.1 indicates. This growth in housebuilding was supported by:
- A period of sustained economic growth;
  - Strong availability of mortgage finance;

- 
- Historically low interest rates; and
  - Attractiveness of housing as an investment.
- 4.15 These factors together with an upturn in population growth rates (influenced in part by growing international migration) saw strong housing demand and an upturn in housing supply. Effective demand for housing over this period increased strongly. Whilst housing supply increased, it was unable to keep pace with the rapid growth in demand, and as a result we saw strong growth in house prices in real terms and relative to incomes.
- 4.16 With the financial crisis, driven by issues associated with sub-prime mortgage lending, the market turned dramatically in 2008. Housebuilding levels fell dramatically, as Figure 4.1 shows, and the number of smaller SME builders shrank significantly. The availability of mortgage finance became more restricted. The situation did not start to ease until 2013 when fluidity within financial markets started to improve, and we saw Government intervention through the Help-to-Buy and Funding for Lending schemes, both of which were significant in supporting a recovery in effective demand for housing for sale.
- 4.17 Over the period between mid 2013 and Q1 2020 the housing market and housebuilding has recovered. The Help-to-Buy scheme has been particularly important in supporting the new-build market, which has performed relatively more strongly than the resale market as a result (in a context in which overall sales remain below longer-term historical trends).
- 4.18 The market is influenced by wider macro-economic stability and confidence, which have been affected by the UK's decision to withdraw from the EU over the period since 2016. This has resulted in some stalling of the growth trajectory in market recovery and housing delivery over the period since. In the greater South East, affordability pressures are also constraining the market and house price growth.

**Figure 4.1: Housing Building Trends Across England, 2000-2018**

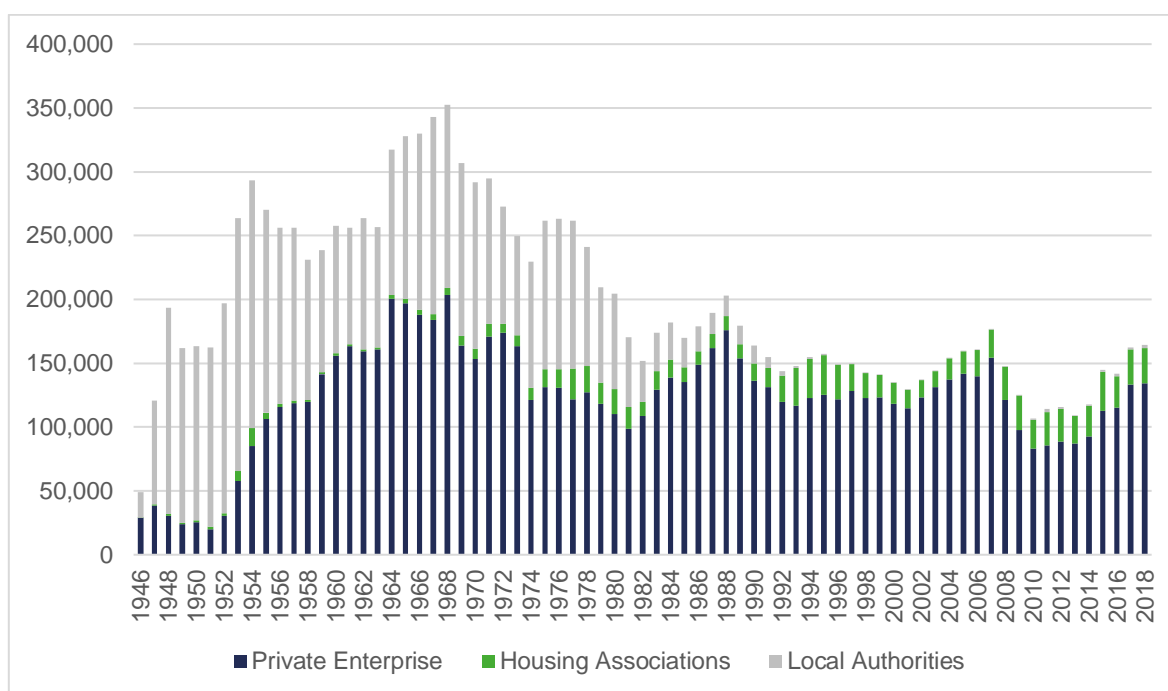


Source: MHCLG Live Table 244

- 4.19 Over this 2001-07 period, private sector housebuilding increased from just under 115,000 in 2001 to just over 154,000 in 2007: an increase of 34%. The growth in development by local authorities and housing associations (primarily development by housing associations) was 7,800 over this period. Housebuilding by local authorities and housing associations was however in many areas offset by significant losses of affordable housing particularly through right-to-buy sales.
- 4.20 Between 2007 and 2010 the levels of housebuilding - and particularly private sector housebuilding - fell quite significantly for the reasons examined above. There was a 40% drop in housing output across England to levels which are some of the lowest seen in the post-war period (with delivery of just 83,000 homes by private enterprises in 2010). The scale of the drop was influenced by both the nature and severity of the recession. There has been recovery since, with trends further influenced by growing conversions/ changes of use (supported by changes to permitted development rights). Delivery rates were recorded at their highest since 2007 in 2018 with 164,390 homes delivered.
- 4.21 Whilst the increase in housebuilding between 2001-07 and 2013-2018 is notable, it is useful to assess it in a longer-term context. The Figure below profiles housebuilding across England since 1946. This highlights that:
- The peak delivery of 176,640 homes achieved in 2007 falls below levels of housing delivered each year between 1952 and 1980, and between 1986 and 1989; although it was the strongest level of housing delivery achieved for over 15 years; and

- Previous periods of higher housing delivery have been supported by a strong programme of housebuilding by the public sector – principally influenced by development by local authorities and New Town Corporations. The level of private sector housing delivery achieved in 2007 at 154,000 has been exceeded in just 15 of the preceding 50 years. Private sector delivery currently stands, based on 2018 figures, at 134,000 across England.

**Figure 4.2: Trends in Housebuilding in England, 1946-2018**



Source: MHCLG Live Table 244

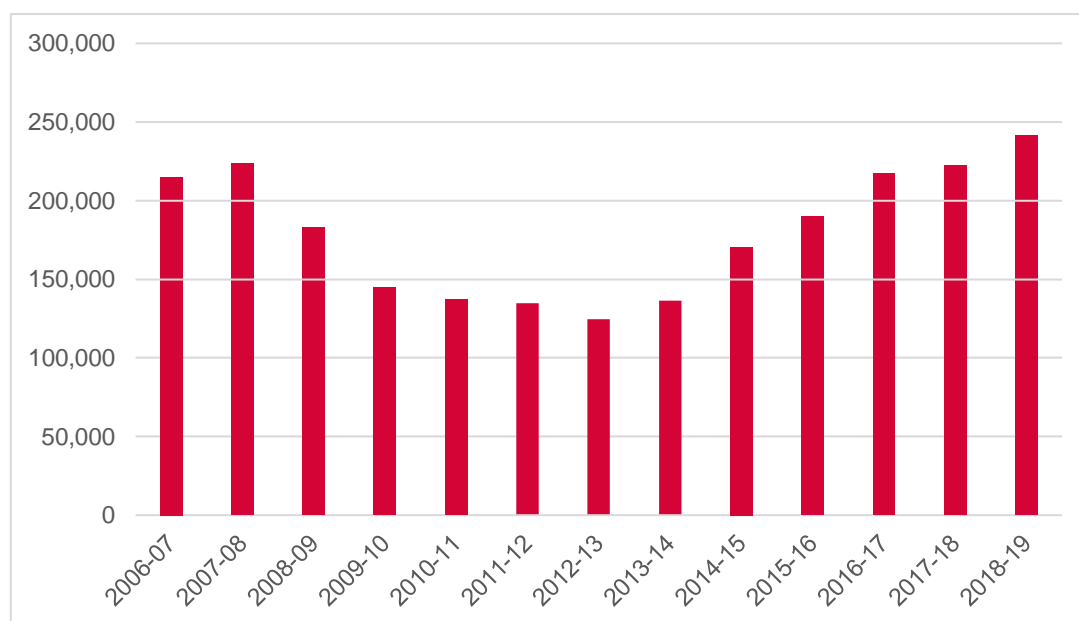
- 4.22 In interpreting Figure 4.2, what also needs to be borne in mind is that strong delivery in the 1950s, 1960s and 1970s was set against a significant number of demolitions. The actual changes in dwelling stock have been much more stable than the data would suggest.
- 4.23 A significant housebuilding programme by local authorities and housing associations clearly supported high overall housing delivery through the 1960s and 1970s. Private sector delivery was higher (relative to the early 2000s) but less notably so. Over the 1960s and 1970s, housing associations and local authorities delivered 43% of completions; with the private sector delivering 57%. In the decade from 2005 to 2014, these figures were 18% and 82% respectively.
- 4.24 Since 1980, delivery of new homes by housing associations and local authorities has been notably more limited. Development of homes by local authorities fell from a peak of 154,500 across England in 1967 to 74,840 in 1980; equal to a decline of more than half. By 1987 it had fallen to 16,620 and fell further through during the course of the Thatcher and Major Governments to delivery of just 290 homes across England in 1997. This was only partly offset by delivery of new homes by housing

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associations. This was an important contributing factor to the overall decline in housing delivery from the late 1960s peak.

- 4.25 The latest MHCLG data shows 177,980 permanent dwellings complete over period from Q4 2018 – Q3 2019. It should be noted that statistics on net additions to the dwelling stock are higher, as a result of the inclusion of sub-division of residential properties and conversions from other uses. Government data taking these changes into account shows higher housing delivery in recent years as Figure 4.3 shows.

**Figure 4.3: Trends in Net Additional Dwellings in England, 2006-19**



Source: MHCLG Table 120

- 4.26 There is a clear logic to the current national policy framework of seeking to diversify the range of organisations involved in housing delivery, including initiatives to support growth in SME builders; and policy support for build-to-rent, self/custom housebuilding, and a return to council housebuilding. The particular question is what funding is supporting this and the pace at which these delivery from these different avenues can be scaled up. An important bedrock will however be to provide a policy framework which supports the growth of different segments of the housing market. This is considered further later in the report in Section 7.
- 4.27 The potential impacts of the Covid-19 pandemic on housing delivery are considered later in this section.

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### **The Trends in Private Sector House Building**

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- 4.28 The most recent recession in the late 2000s, triggered by the credit crunch, has been the deepest recession in the post-war period. It took 22 quarters (2008 Q1 to 2014 Q2) for the economy to recover

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to pre-recession peak levels. We saw a substantial reduction in private sector housing delivery to levels not previously seen post 1955. Private sector housebuilding in England fell from 154,210 in 2007 by over 70,000 to a low point of 83,280 in 2010 – this represented a 46% reduction in private sector delivery from the 2007 peak over just a 3 year period.

- 4.29 In the following years recovery was relatively slow initially, with a modest growth between 2010 and 2014 linked to a range of factors including weak effective demand for housing for sale (with continuing restrictions on mortgage finance, financial liquidity and weak consumer confidence) and a lack of capacity within the sector. In 2015 and 2016 private sector completions increased (in part in response to the Help-to-buy scheme) and were once again over the 100,000 per annum mark, but remained well below the pre-recession levels. By 2018 they have recovered to 134,000 across England.
- 4.30 It needs however to be borne in mind that conversions and changes of use have however made a significant recent contribution to growth in the dwelling stock (in part influenced by permitted development rights for office-to-residential conversions since 2013). In 2018/19 for instance these accounted for delivery of 34,500 homes.
- 4.31 Trends in private sector construction have shown a declining number of smaller housebuilding firms, as discussed within the CLG Select Committee Inquiry on Housebuilding Industry Capacity. The House of Lords Select Committee report cites figures that show that this has been a longer term trend – the numbers of smaller housebuilders (those delivering 100 units or fewer a year), peaked in 1988 at around 12,200 firms but the number had dropped to around 2,400 by 2014.

**Table 4.1 Number of Smaller Housebuilding Firms, 1988- 2014**

No. of Units Registered (p.a.)	1998	2008	2014
1-10	10,112	4,411	2,000
11-30	1,500	745	244
31-100	603	311	159

Source: Federation of Master Builders (EHM0140)

- 4.32 The decline in smaller housebuilders was hastened by the last recession with small builders hit hardest during this period. The number of homes registered by small builders is down from 44,000 in 2007 to 18,000 in 2015. The result is that the market share of smaller housebuilders has shrunk from 28% in 2008 to 12% in 2015. There is in effect a structural issue with the housebuilding sector whereby a significant proportion of output is delivered by a small number of large national firms.
- 4.33 The Federation of Master Builders identified two main barriers to entry for smaller housebuilders: access to finance since the financial crisis, and the “complexity and uncertainty” of the planning

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system resulting in a relatively higher risk for smaller developers. The Housing White Paper has sought to address this, and support growth in building by SME firms.

### **The Housing Market Area**

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- 4.34 Horsham falls within the North West Sussex Housing Market Area. Its geography was originally identified in the report by DTZ Peda in 2004. The definition of a Northern West Sussex HMA was then endorsed by both the 2009 Strategic Housing Market Assessment (SHMA), the 2014 SHMA Update and the 2019 SHMA.
- 4.35 Icen's 2019 SHMA continues to support the definition of a Northern West Sussex Housing Market Area which is comprised, as a best fit to local authority boundaries, of Crawley, Horsham and Mid Sussex. This has been tested and endorsed at the three authorities' local plan examinations.
- 4.36 There is evidence of an overlap with surrounding housing market areas in particular in the southern parts of Horsham and Mid Sussex, the evidence points to Steyning, Hurstpierpoint and Hassocks (and potentially Burgess Hill) as falling within this area of overlap between the Coastal and Northern West Sussex housing markets. In the northern part of the area, the evidence shows a functional relationship with parts of Surrey – and in particular areas in Surrey to the south of the M25; with the strongest relationship (in house price and commuting terms) being between Crawley and Horley. The growth of the economic hub around Crawley/Gatwick could over time influence the housing market geography.
- 4.37 As set out within the SHMA, whilst the core focus of joint working on housing issues should therefore remain within the three-authority HMA geography, it will be important that the HMA Councils actively engage with authorities in the Coastal West Sussex HMA and authorities within Surrey to the north through the Duty to Cooperate on any cross-boundary issues arising in respect of housing provision.

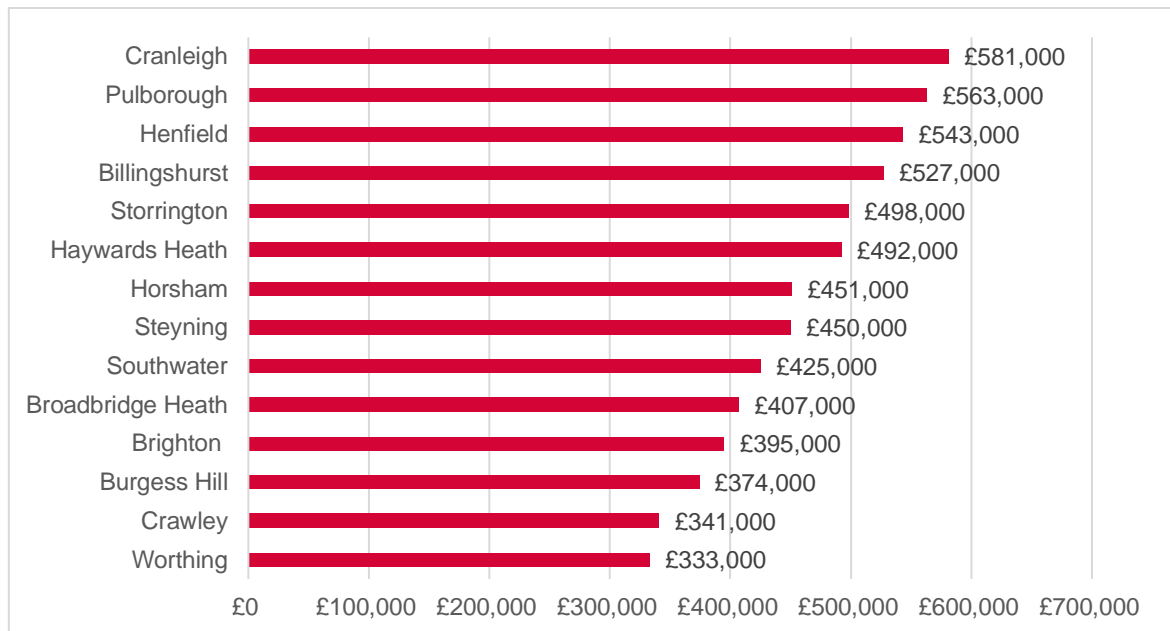
### **Housing Market Dynamics**

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- 4.38 The house price geography can be understood at a number of different tiers. At a regional level, it shows higher house prices in proximity to London. At a sub-regional level, we see higher housing costs in Surrey and parts of Hampshire than in West Sussex. There is a similarity in house prices between areas in Horsham and Mid Sussex districts. At a more local level, we find an urban/ rural distinction in house prices which is influenced by differences in the housing stock and profile of sales (with higher sales of larger, more expensive homes in rural areas) as well as an influence of 'quality of place' on house prices.
- 4.39 Looking at prices in Horsham's main settlements and those in surrounding areas, settlements such as Henfield and Billingshurst have the highest prices (> £500,000). Prices in Horsham Town average around £450,000. Lower prices are evident in Southwater (£425,000).

- 4.40 Prices in the District are generally above those in a number of surrounding areas including in Brighton, Burgess Hill, Crawley and Worthing (in each case with average prices of below £400,000).

**Figure 4.4: Average House Prices for Similar Properties, Jan 2020<sup>6</sup>**



Source: Icen analysis of Zoopla Z-index data

- 4.41 The table below provides comparisons of mean, median and lower quartile prices at a District level. Sales values are generally similar to those in Mid Sussex, and above those in Crawley and in Sussex Coast authorities. They are above the South East average.

**Table 4.2 Average and Lower Quartile House Prices in the Housing Market Area**

Area	Median	Mean	Lower Quartile
Horsham	£380,000	£424,828	£298,000
Mid Sussex	£380,000	£431,000	£295,000
Crawley	£295,000	£310,241	£249,995
West Sussex	£325,000	£368,477	£250,000
South East	£348,333	£371,495	£255,000
England	£320,000	£378,875	£240,000

Source: ONS, House price statistics for small areas in England and Wales, year ending September 2018

<sup>6</sup> The Zoopla data is looking at like-for-like values for similar properties. It uses Hometrack data and considers sold prices, changes in market value for similar properties, number of bedrooms, and local area characteristics.

- 4.42 The median house price in Horsham is £380,000, some 9% above the South East average of £348,000. Horsham District has similar median house prices to Mid Sussex; whilst Crawley has a median house price some 28% lower.

#### **New-Build Sales Performance Evidence**

- 4.43 Icení have undertaken market research speaking to the sales agents of existing housing schemes coming forward within the District and surrounding areas. This was undertaken prior to the Covid-19 lockdown. Key schemes considered included Kilnwood Vale in Crawley, Highwood Village in Horsham, Amblehurst Green in Billingshurst, Mulberry Fields in Southwater and Kings Weald in Burgess Hill. The table below sets out asking prices for these schemes.

**Table 4.3 Sales Values Evidence, Spring 2020**

	2 bed house	3 bed house	4 bed house	Average
<b>Kilnwood Vale (Taylor Wimpey)</b>	350,000	400,000	450,000	400,000
<b>Highwood Village Horsham (Berkeley Homes)</b>	400,000	500,000	700,000	533,000
<b>Amblehurst Green, Billingshurst (Bellway)</b>	325,000	380,000	585,000	430,000
<b>Mulberry Fields, West of Southwater (Miller Homes)</b>	325,000	445,000	550,000	440,000
<b>Kings Weald, Burgess Hill (Croudace)</b>		395,000	470,000	432,000

Source: Icení Research, 2020

- 4.44 Sales agents at Kilnwood Vale describe a mix of buyers, with 60-70% of people who have moved into the development coming from the local area (including Northern Horsham District and Crawley) and 30-40% moving from other parts of Surrey and South London, including Epsom and Croydon as housing values are lower. The majority of residents work locally. 2-bed properties which are affordable for small families and couples have been the most popular. Sales volumes have averaged 2 per week.
- 4.45 Berkeley Homes' Highwood Village Scheme in Horsham is a development of 1,044 dwellings which has been building out for 7-8 years, with over 600 properties now sold. It provides apartments and houses with 1-5 bedrooms, and attracts a range of households including singles, couples, families, and elderly downsizers. It has attracted people from the local area and areas to the south; with residents working locally or commuting to Crawley/ Gatwick. Sales volumes have fluctuated but have averaged around 1 per week (the lower sales rate perhaps reflecting the more premium product). Apartments have been popular with investors; with 3 and 4 bed properties the more popular house types. The scheme has included older persons accommodation.
- 4.46 Miller Homes Mulberry Fields development, west of Southwater, has seen delivery of 2 phases to date (193 dwellings) and offers properties of between 2-5 bedrooms. The profile of buyers has shown an even spread between families and couples, with less older downsizers. It has attracted people

from Horsham and Crawley; and this is where the majority of residents' work. The most popular type of home has been 4 bed detached properties. Sales of 2 per week on average have been achieved at this site.

- 4.47 Bellway's Amblehurst Green development has seen a mix of different types of buyers, with lots of people moving to the development moving locally in Billingshurst, Horsham and Pulborough; as well as a proportion of buyers moving from south London suburbs such as Carshalton, Purley and Croydon who seek more space/rural lifestyle. Many of those buying properties work locally in Billingshurst and Pulborough, but with buyers also commuting to London and Crawley. Three-bed semi-detached and detached properties sell best but there is also a market for flatted properties. In late 2019 and early 2020 sales were averaging 3 per week.
- 4.48 Croudace's Kings Weald Scheme at Burgess Hill (which falls in Mid Sussex District) includes properties of 2-5 bedrooms and has attracted a mix of buyers; principally those from the local area including the town, Haywards Heath and Brighton (in part due to lower values in Burgess Hill). Buyers moving from London are 'occasional.' Phase 2B is 100% reserved and Phase 3A is now being marketed. Average sales volumes in 2019 were described as 2 per week.
- 4.49 Overall the housing sales market within the Horsham District is popular, agents made particular reference to the beginning of 2020 when the sales market picked up notably. Sales are however likely to be affected by the Covid-19 virus in the short term. This is considered further later in this section.

#### Rental Market Dynamics

- 4.50 IcenI have spoken to local agents with knowledge of local rental market dynamics within Horsham District and immediate surrounding areas in February 2020. This included a selection of agents across the District, including Crawley, Billingshurst, Horsham and Southwater; and in Burgess Hill.
- 4.51 Local agents provided average (median) rental values which are set out in Table 4.4. The values point to a strong market for family sized properties in Horsham.

**Table 4.4 Indicative Average monthly Rental Costs in Main Settlements (£)**

	2 bed	3 bed	4 bed	Average
<b>Crawley</b>	1000	1300	1395	1231
<b>Horsham</b>	1000	1250	1500	1250
<b>Billingshurst</b>	1100	1200	1300	1200
<b>Southwater</b>	950	1200	1300	1116
<b>Burgess Hill</b>	1000	1300	1400	1233

Source: IcenI Research, March 2020

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- 4.52 Agents indicate that the rental market in Crawley is very active and includes a wide variety of households seeking properties, including families, couples and singles. Rental market vibrancy is supported by the scale of the employment market in Crawley, including employment at Gatwick Airport and in Manor Royal Business District. There is also a vibrant short-term rental market in Crawley linked to the those with short-term contracts in particular at Gatwick Airport. The Crawley market is likely to have been significantly affected by the Covid-19 situation which has had a significant impact on flight volumes and the functioning of Gatwick Airport. This is understood to be having a severe knock-on impact on the wider local economy, which is significantly reliant on the airport.
- 4.53 The rental market in Horsham is vibrant but is more focused on small families and couples; and doesn't see significant proportions of single persons or downsizers seeking rental properties. Most of those seeking rental properties in Horsham are moving locally, but with some seeking properties who are moving into the area – both from other parts of the country and overseas – in particular associated with an offer of employment at larger employers such as RSA Insurance. Most of those renting in Horsham tend to work locally, within a 30-minute travel time, such as in Horsham, Crawley, Pulborough or Haywards Heath.
- 4.54 Agents in Billingshurst describe a popular rental market greater relative demand from couple seeking 2-bed properties in particular, as well as families. A recent trend has seen people moving to the area from further afield; with notable numbers commuting to London. With limited employment opportunities locally, agents describe people commuting to Horsham and Crawley for work; and from areas south of Billingshurst to Worthing and Brighton.
- 4.55 Similarly in Southwater, agents describe the rental market as focused on young couples and families; with the profile of demand including those who work locally in Southwater and Horsham as well as in Crawley. The agent we spoke to described very strong rental demand with value growth of 2.5% pa.
- 4.56 Agents in Burgess Hill point to a rental market which is particularly focused on demand from families and those working locally, including those employed by American Express which is a major employer in the town. A small proportion of tenants move from London.
- 4.57 All agents which we spoke to suggested a strong rental market at the current time with an insufficient number of rental properties on the market relative to demand. Both the rental and sales markets are likely to have been affected by the Covid-19 situation, and this is considered further later in this section.

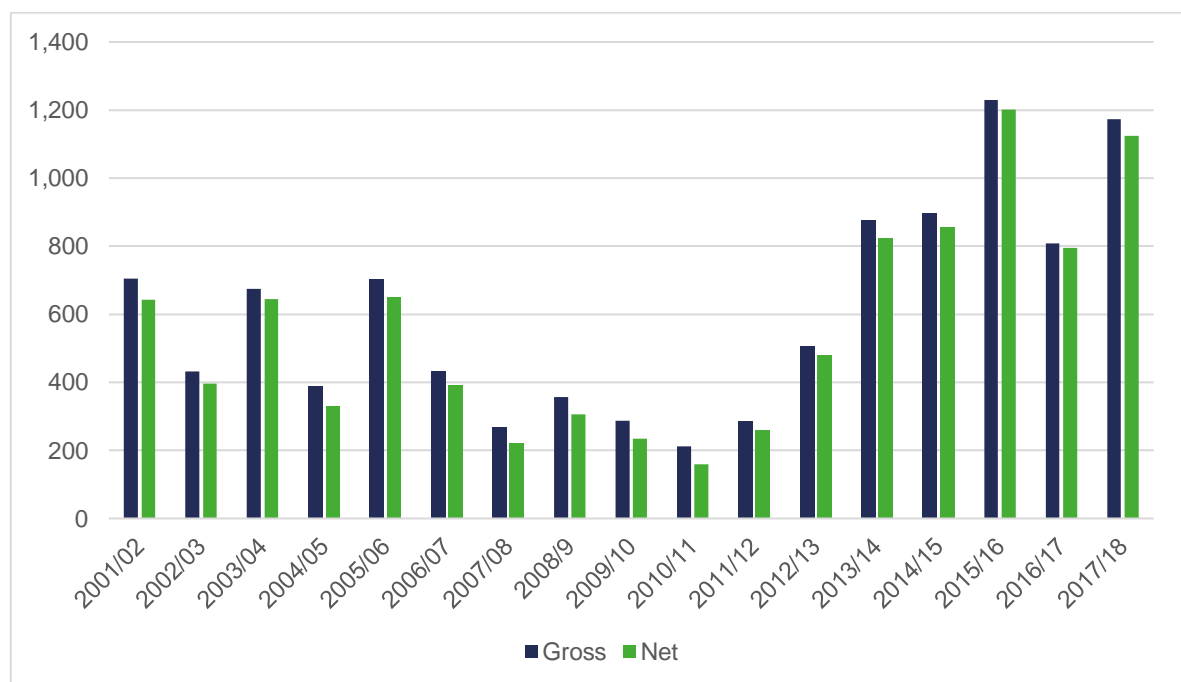
## Housebuilding Trends in Horsham District

4.58 The Council holds housing completions data in Horsham District over the period since 2001. This is shown in the chart below. Net completions over the 2001-18 period in the District have averaged 560 dpa, but there are clear differentials between different periods:

- Completions over the pre-recession period (2001-9) averaged 449 dpa. This compares to a Structure Plan housing requirement equivalent to 447 dpa.
- Over the 2009-13 period, net completions of 284 dpa were recorded. This was a period in which housing delivery was significantly impacted by the credit crunch and housing market downturn. For much of this period the South East Plan was in place which set out a housing target equivalent to 650 dpa.
- Over the period since 2013, net housing delivery has averaged 960 dpa – a significantly higher level. This compares to an HDPF target of 800 dpa. This is likely to have been influenced by a combination of economic circumstances, and the planning environment whereby the Council adopted the HDPF in 2015. It is common for there to be a spike in housing completions around the time of a plan adoption and immediately thereafter.

4.59 The recent evidence shows that significantly higher levels of housing delivery than the long-term average of 560 dpa can be sustained. The evidence shows that as higher housing targets have been put in place, the local market has responded to increase housing delivery relatively quickly.

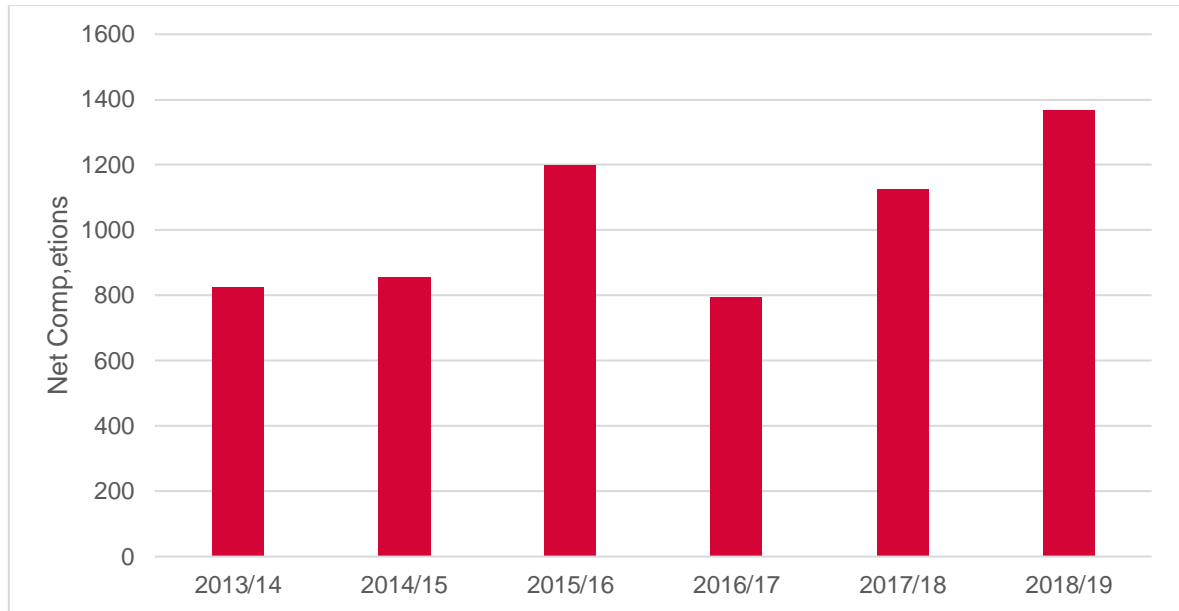
**Figure 4.5: Housebuilding Trends in Horsham, 2001-2018**



Source: Horsham Annual Monitoring Reports (2001-2018)

- 4.60 Net housing completions in the Plan area over the last six years during the current housing market cycle have averaged 1,028 dwellings per annum; with the average annual delivery over the last 5 years being 1069 dpa. Delivery of 1,201 dwellings was achieved in the plan area in 2015/16 with 2018/19 seeing net completions of 1,368 dwellings.

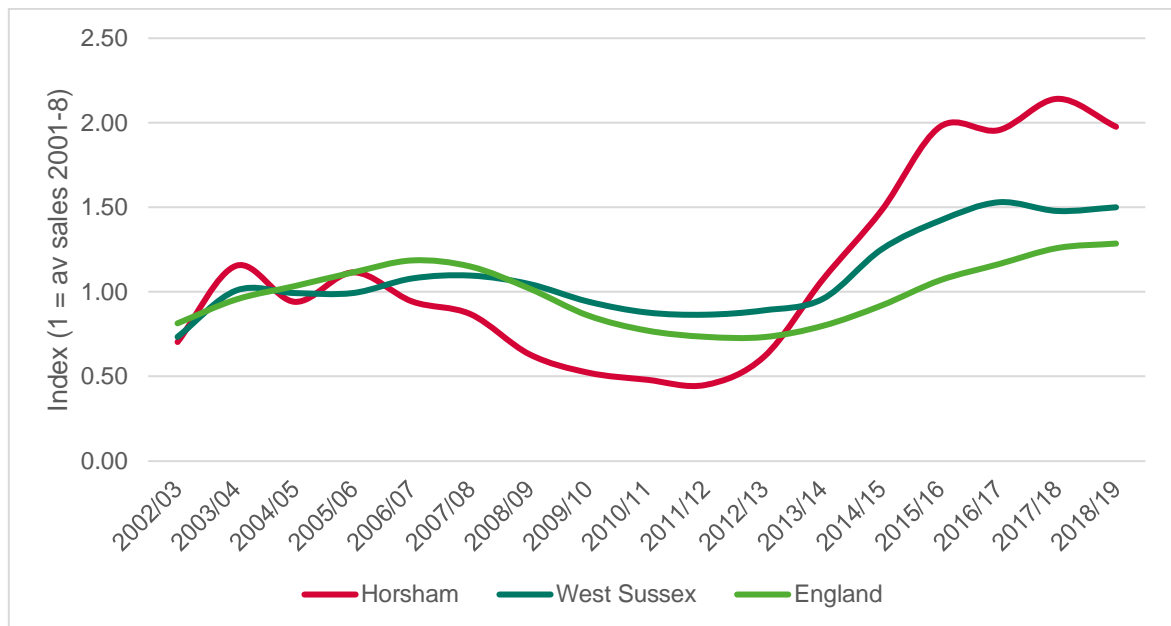
**Figure 4.6: Recent Housing Delivery in Horsham District Plan Area**



Source: HDC Completions Data

- 4.61 Setting this level of housing delivery in context, the Figure below provides an indexed comparison between delivery rates in Horsham, West Sussex and England. The graph uses three-year averages and is indexed against the average delivery rates across the pre-recession period (i.e. the period from 2001 to 2008).

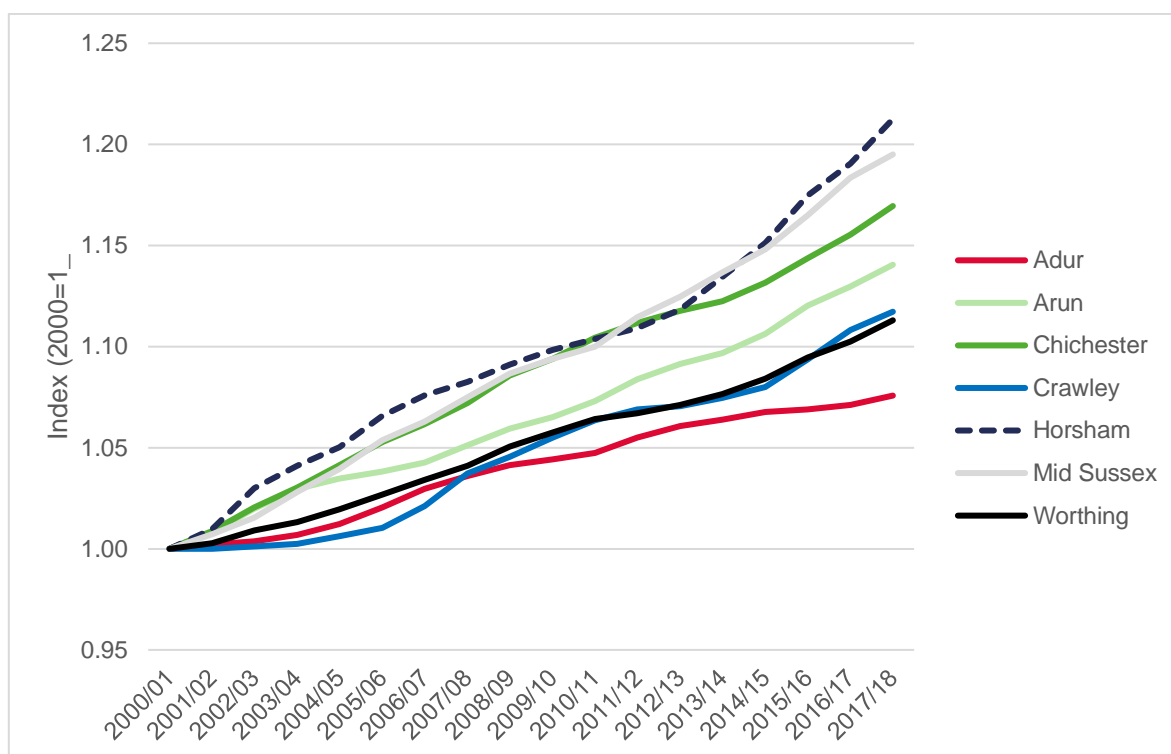
**Figure 4.7: Indexed Comparative Housebuilding Trends (2001-2019)**



Source: MHCLG Live Table 122

- 4.62 It shows that Horsham began to experience a downward shift in housing completions from 2005/06 before falling to a particularly low rate during the economic downturn in relative terms, in comparison to the pre-recession average. However, the analysis is also clear in showing that the District recovered particularly strongly in the years following the market upturn from 2011/12 onwards; with housing completions now at a particularly high rate in comparison to the pre-recession average and wider benchmarks. The evidence points to Horsham seeing a slightly earlier and stronger recovery in housing delivery from the last recession relative to wider national trends.
- 4.63 Of interest, the analysis also shows that housebuilding rates across West Sussex have now reached a level which is 50% above the pre-recession average, out-performing national trends. Recent housing delivery in Horsham has been twice the pre-recession trend.
- 4.64 Turning to housing stock growth, Figure 4.8 uses an indexed analysis to consider how the total housing stock has changed over the period from 2000 to 2018 across the West Sussex county authorities. The housing stock has grown by 15% across West Sussex over this period, with performance of individual authorities varying from 8% growth in Adur (which is heavily physically constrained) to 21% growth in Horsham which has seen the strongest housing stock growth in West Sussex.

**Figure 4.8: Indexed Comparative Net Changes in Housing Stock in West Sussex, 2000-2018**



Source: MHCLG Live Table 125

4.65 What the graph also shows is that there has been an upturn in housing delivery in a number of authorities in the period since 2013, including in Crawley; Chichester and Mid Sussex. This is likely to have been influenced by both improved market circumstances and additional supply being brought forward through new local plans.

4.66 It is also useful to look at comparable areas which are similar in terms of market characteristics. We have used a similar analysis to provide a comparison of housing delivery performance between different areas. Figure 4.9 summaries the housing stock growth of authorities with similar market characteristics within the East of England and South East of England. We have sought to identify comparator areas which demonstrate a number of common characteristics:

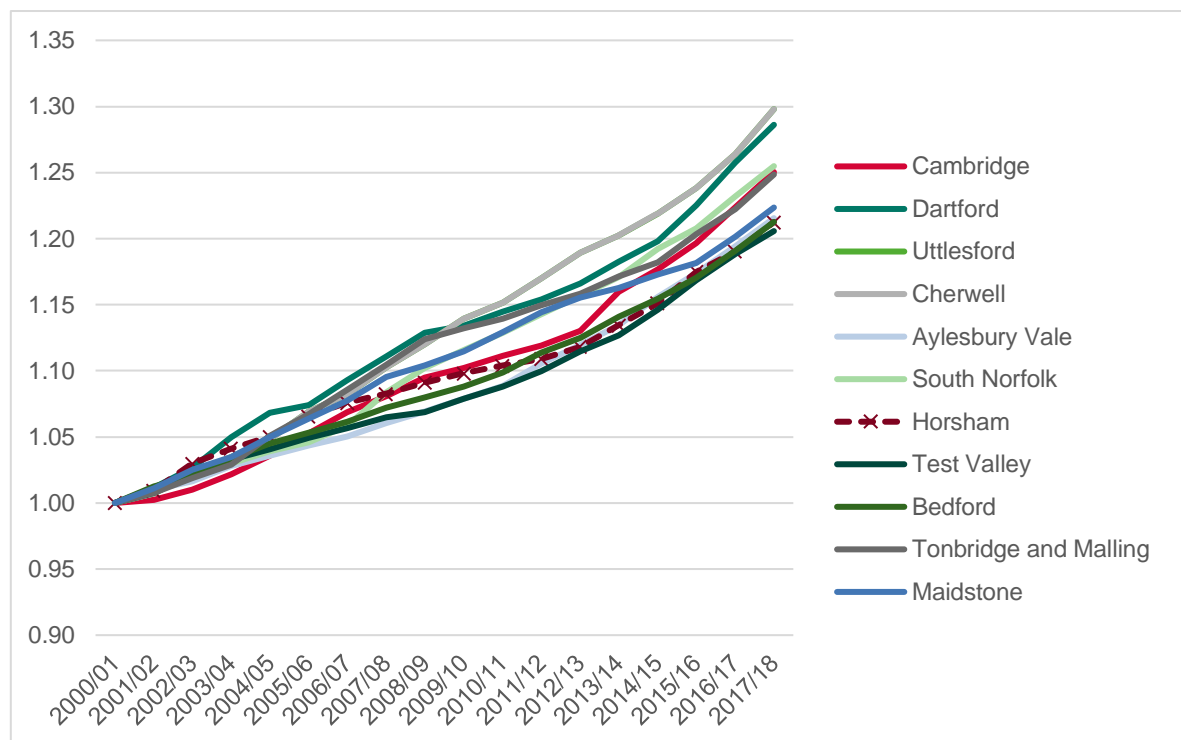
- Areas which are accessible to London (particularly by rail) but which do not have substantive areas within Metropolitan Green Belt;
- Authorities which include a main town or a number of main towns, together with a range of smaller settlements and rural area;
- Areas which in a regional or national context are relatively higher value including comparator areas with similar value characteristics to Horsham.

4.67 These include relatively high value areas in the greater South East which sit beyond the Green Belt. It highlights how Horsham's housing stock has kept up with the average rates as the local authorities

listed below and indeed indicates that there are areas in which stronger housing delivery performance has been achieved.

- 4.68 Over the 2000-18 period the analysis shows that for instance Maidstone has seen 21% stock growth, Tonbridge and Malling has seen 25% growth with the strongest performing authorities being Dartford (29%), Uttlesford (29%) and Cherwell (30%).<sup>7</sup> This compares to the 21% growth in housing stock seen in Horsham over this period.

**Figure 4.9: Indexed Net Changes in Housing Stock vs. Strong Performers, 2000-2018**



Source: MHCLG Live Table 125

- 4.69 Drawing on the analysis above, the Table below sets out the annual growth rate for housing completions over the past 18 years from 2001 to 2019; alongside the rate of growth following the economic downturn over the period from 2012 to 2019. The performance of Horsham is set against the performance of other authorities with similar market characteristics. The analysis appraises the Compound Annual Growth Rate (CAGR) in the housing stock, which shows what average rate of growth per year has been achieved.

<sup>7</sup> Prior to 2010 Dartford fell within a recognised Growth Area; and from 2005-10 Maidstone was designated as a Growth Point

**Table 4.5 Average Annual Growth Rates, 2001-19 & 2012-19**

Local Authority	CAGR 2001 19	CAGR 2012 19
Vale of White Horse	1.2%	1.9%
Cambridge	1.3%	1.9%
Dartford	1.5%	1.8%
Uttlesford	1.5%	1.7%
Cherwell	1.5%	1.7%
Aylesbury Vale	1.2%	1.6%
Test Valley	1.1%	1.5%
Bedford	1.1%	1.4%
Tonbridge & Malling	1.3%	1.4%
Maidstone	1.2%	1.1%
<b>Horsham</b>	<b>1.1%</b>	<b>1.5%</b>

Source: Icen analysis

- 4.70 The analysis shows that over the period from 2001 to 2019, which covers the full economic cycle, the average annual growth rate in Horsham was 1.1% which is line with Bedford and Test Valley; but falls some way short of authorities such as Uttlesford and Cherwell at 1.5% per annum. This is a period which included a sustained and severe economic recession and therefore the figures should not be regarded as an absolute cap on which might be achieved moving forwards.
- 4.71 Over the most recent period, post-recession (2012-19), Vale of White Horse and Cambridge has seen particularly high growth at a rate of 1.9% per annum. Horsham's comparative performance is of 1.5% pa growth. Horsham's recent growth has been influenced by the timing of the adoption of the Horsham District Planning Framework in 2015. Our experience is that there strong housing completions are often achieved around and immediately after the adoption of a plan in an area.
- 4.72 Over the last 5 year period (2014-19) Horsham has seen a higher housing delivery rate still of 1.8% pa . This is influenced by planning for a higher level of housing delivery through the Horsham District Planning Framework and sites identified within this coming forward for development. Clearly however this does not span a full housing market cycle.
- 4.73 For comparative purposes, the Government's stated ambition to sustain delivery of 300,000 homes per year across England would equate to an annual growth rate in the housing stock nationally of 1.1% pa. Clearly areas in higher demand markets such as the South East could be expected to support higher housing delivery rates than the national average; and therefore the long-term delivery performance of 1.1% pa in Horsham cannot be seen as a cap on what is realistic in the future.

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## Potential Impacts of Covid-19 on the Housing Market

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- 4.74 The Covid-19 pandemic started to affect the UK's economy and housing market in March 2020 with the UK put into 'lockdown' on 23<sup>rd</sup> March 2020 in an unprecedented step to attempt to limit the spread of coronavirus. Icenl has sought to consider and appraise herein the effects which the pandemic could have on the housing market and housing delivery based on the information available in early May 2020.
- 4.75 It is clear from emerging data that the lockdown is having a significant short-term impact on the housing market. This includes a direct impact on housing delivery from the closing down of housing sites in March 2020; together with an impact on viewings and sales of new homes with sales offices and estate and letting agents closed. What started as a health crisis is also likely to result in an economic recession.
- 4.76 The Bank of England's *Interim Financial Stability Report* of May 2020 sets out that the coronavirus pandemic has resulted in a sudden and very marked drop in global economic activity, reductions in household consumption of around 30%, a very marked decline in consumer confidence and that housing market activity has practically ceased. It estimates that housing investment is around 60% down; and equally notes that mortgage availability has contracted (in particular the availability of loans at higher loan-to-value ratios).
- 4.77 The Bank of England set out that the economic outlook will depend on the evolution of the pandemic and how Governments, households and businesses respond. Their Interim Financial Stability Report outlines a 'plausible illustrative scenario' in which the UK economy sees a very sharp fall in GDP which declines by 4% in Q1 2020 and could fall by 20% in Q2. Alongside this there is a substantial increase in unemployment from 4% to 9% (in addition to those who have been furloughed). Their scenario envisages that the fall in GDP is temporary and economic activity is expected to pick up relatively rapidly in the second half of 2020. This is based on an assumption that the current lockdown is in place until early June with restrictions then gradually lifted over the following four months.
- 4.78 What the illustrative scenario points to is a relatively rapid economic recovery. In 2020 as a whole GDP is forecast to fall by -14%, but 2021 is expected to see 15% growth resulting in a relatively 'V-shaped' recession. Whilst consumer confidence is expected to take some time to recover, the households savings ratio (the proportion of earnings which people save) is expected to rise in the short-term which for some households may in time support house purchases.
- 4.79 Encouraged by the Government, as at May 2020 we are seeing some construction sites begin to reopen. Savills report in its *Residential Development Briefing* in May 2020 that construction will recommence on around 100,000 homes across England and May in the first two weeks of May 2020. New sites which were planned to launch before the lockdown commenced are being held back until

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it has lifted and confidence returns that homes are selling again. It expects housebuilders to be back up at 80% of their previous capacity by the end of the year, with 2020 housebuilding output 30-35% below the 2019 level influenced a combination of the lockdown, effects of social distancing measures on capacity and short-term difficulties in securing construction materials. Forecasts for values vary with Savills predicting a 10% fall over the course of 2020, whilst Knight Frank forecasts a more modest 3% drop, both off low volumes of transactions. Savills April 2020 forecasts are of a return to normal levels of housing sales by May 2021. The current outlook is thus for a much more rapid recovery in the housing market than in the last recession.

- 4.80 The forecasts above are at a national level. The effects on the market in Horsham District and Northern West Sussex more widely will be influenced particularly by the effects of the Coronavirus on the sub-regional economy. Gatwick Airport is a major economic driver within the sub-region with employment both on the airport, and in airport and aviation-related businesses across the wider sub-region. Air travel has been significantly affected by the Coronavirus pandemic with flight volumes at the end of April 2020 down 98%. On 24<sup>th</sup> April 2020 the airport indicated that it expected passenger numbers to recover over 36-48 months indicating that recovery could be phased over the period to early 2022. Icen also note that in recent weeks Virgin Atlantic has indicated that it will consolidate its operations at Heathrow, withdrawing from Gatwick in the short-term; and there is a risk that British Airways' operations are also affected.
- 4.81 The significant impact of the pandemic on the aviation sector, coupled with the significance of aviation to the sub-regional economy, means that there is potential for the pandemic to affect the sub-regional economy in Northern West Sussex to a greater degree than in some other areas. Centre for Cities have placed Crawley as the most exposed of the cities and large towns nationally with over half of its jobs in either vulnerable or very vulnerable sectors.<sup>8</sup> Set against what has previously acknowledged to be a constrained capacity at airports in South East England, the pace of recovery is however somewhat uncertain.
- 4.82 At a regional level, there is however some prospect of the relationship between London and areas within the Home Counties with strong transport connections to it evolving. A survey of 900 prospective buyers by Savills in May 2020 found an increased inclination to upsize, particularly given an expectation that householders will work from home more in the future. Those under 40 were found to place increasing weight on outdoor space. These types of factors could lead increasing numbers of households to move out of London, where much of what is being built is flats, to areas within the Home Counties within commuting distance; with early anecdotal evidence of this.

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<sup>8</sup> Centre for Cities (April 2020) *What does the Covid-19 crisis mean for the economies of British cities and large towns*.

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- 4.83 The above clearly shows that there is likely to be a short-term effect on housing delivery from the Coronavirus. Icení has considered an indicative scenario in which housing delivery in 2020/1 is 45% down on what had previously been expected; with a 20% reduction in 2021/2. The implications of this are considered in Section 6. This is clearly however an area where there is significant uncertainty and it may therefore be appropriate to review the findings prior to the Plan's submission.

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## 5. DELIVERY OF STRATEGIC SITE OPTIONS

- 5.1 In this section Iceni has moved on to consider issues relating to the delivery of the strategic site options set out within the Local Plan Regulation 18 Consultation Document. Our assessment of the sites considers, on a site-by-site basis, the potential lead-in time to delivery of completions on site; and the potential build-out rate of individual sites. This is then used to inform the construction of housing trajectories considering different strategic options for growth in Section 6.
- 5.2 Iceni has drawn on information on the strategic sites set out in the Local Plan Consultation Document, from a proforma was were sent to each of the promoters of the strategic sites to collect relevant information, together with discussions with Horsham District Council officers and discussions with a number of site promoters to further inform consideration of the pace and phasing of delivery of potential strategic site options.
- 5.3 The proformas sought to collect information regarding landownership and promotion agreements; progress with site investigations and masterplanning; timeframes for the submission of planning applications and anticipated timeframes for delivery of the sites. They also sought information regarding the delivery model as well as major infrastructure requirements and this might influence the delivery of the site. Iceni has critically reviewed the information provided, discussed delivery issues and challenges with potential site options with Horsham District Council officers, and taken account of both published research on housing delivery rates and our own experience and research in this area.
- 5.4 Iceni's analysis focuses on strategic physical infrastructure which could influence the deliverability or delivery timings of different strategic site options. We assume that all strategic sites of scale will be able to deliver community facilities, primary healthcare, primary schools, and green infrastructure for instance.
- 5.5 The conclusions which Iceni has drawn in this report are based on the information available at the point in time of its preparation, and it is possible that further evidence could be provided by developers/ site promoters as the plan-making process progresses which could provide the Council with confidence that a higher delivery rate or earlier delivery rate was achievable; or conversely other evidence may emerge following consultation which may require further study / mitigation which could potentially slow the progression of some sites. In particular there is the potential for issues associated with the timing and delivery of strategic infrastructure to affect site viability and delivery timescales. These issues should therefore be kept under review as the plan-making process progresses.
- 5.6 We have structured the analysis to consider options first for urban extensions; and then the new settlement options.

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- 5.7 The analysis in this section has been based on the potential delivery trajectory considering individual sites on their own. There are however potential inter-relationships to consider at a localised level should multiple strategic sites be identified which could affect build-out rate assumptions. These issues are explored further in Section 6 which explores options for different combinations of sites.

### **West of Ifield**

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- 5.8 The strategic site at the West of Ifield is located on the western boundary of Crawley Borough. It is being promoted by Homes England for 3,250 homes within the plan period to 2036 on 194 ha of land; with the potential for up to 10,000 homes to be delivered across a wider area as a new garden community over the longer-term. The scheme would essentially deliver a new neighbourhood to Crawley.
- 5.9 Homes England currently owns around 66% of the land for the delivery of the 3,250 home scheme; and has in place agreed Heads of Terms and approval to enter into a conditional contract with the other five landowners subject to planning permission and a successful local plan allocation. There are a total of six landowners (including Homes England). Homes England indicates that it expects conditional contracts to be entered into during 2020.
- 5.10 Key strategic infrastructure constraints to development of the site include aircraft noise, highways and waste water treatment capacity and flood alleviation issues. It is understood the scheme will not include any residential development above the 60dB noise contour, and that Crawley BC have indicated the potential to remove the safeguarding area for a new southern widespaced runway; and Gatwick Airport Limited have also confirmed that the emerging masterplan will not impact on its operational requirements.
- 5.11 Homes England have indicated that initial transport modelling work suggests that there are a number of existing capacity issues within the Crawley area which need to be addressed further growth; and that the 3,250 home scheme in isolation does not require the delivery of a full Crawley Western Relief Road; but that the cumulative impact of growth in/around Horsham and Crawley through Local Plan Reviews are likely to require its delivery. The relationship between the delivery of this development and the funding and delivery of the Western Relief Road is a major issue which would need to be resolved in respect of this site.
- 5.12 The development is currently being modelled as part of Thames Water's review of wastewater treatment capacity in the Crawley area as part of the preparation of a Water Cycle Study, but Iceni understands from Homes England that technical solutions are being developed to provide additional capacity. A comprehensive flood risk and surface water drainage strategy has been developed.

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- 5.13 The other major infrastructure would be the delivery of a secondary school (minimum 8FE) which the County Council indicates would need to be delivered by the mid-2020s. Two primary schools and associated community infrastructure would also need to be brought forward.
- 5.14 An illustrative masterplan for the 3,250 scheme is under preparation, together with preparation of a comprehensive Infrastructure Delivery Plan and HM Treasury Green Book Business Case. Masterplan consultation is ongoing having commenced in January 2020. It is anticipated that the illustrative masterplan will be completed by summer 2020.
- 5.15 Homes England indicate that an outline planning application is due to be submitted in Autumn 2020, with a view to determine soon after the Local Plan is adopted, hence mid to late 2022. Within their Strategic Plan, Homes England anticipate delivery start of 200 homes as part of scheme in 2022/23; with delivery rates are expected to rise to 250 dwellings per annum from 2026/27 onwards. This would see delivery of the 3,250 homes within the plan period. The local plan options current test delivery of a maximum of 3,000 dwellings over the plan period.
- 5.16 Notwithstanding Homes England's involvement as master-developer, Icenl considers that these timescales based on the current evidence are overly optimistic. If allocated, the mechanism to bring forward the site will need careful consideration. A Planning Performance Agreement is in place between Homes England, Horsham District Council, Crawley BC and West Sussex County Council.
- 5.17 We consider that determination of a planning application in late 2022/ early 2023 is likely, following adoption of the Local Plan Review; that on this basis initial completions on this site in 2024/5 is more realistic. Completions can then be expected to build-up over time achieving build-out rates of 250 dpa from 2028/9 as the build-out of homes at Kilnwood Vale tails off. On this basis, we see delivery of around 2,800 homes over the plan period to 2037.
- 5.18 The build-out rates take account of Homes England acting as a master developer, with involvement of multiple housebuilders, housing associations and SME builders; including a level of delivery using Modern Methods of Construction (MMC). 35% affordable housing delivery is currently proposed.
- 5.19 There is potential for a wider garden community of 10,000 homes with associated employment and infrastructure to be brought forward in this broad location, which Homes England suggests could increase delivery to 400 dpa from 2031 and to 500 from 2036 with additional outlets. This assumes delivery of the full Western Relief Road. Further detailed evidence would need to be provided to justify and demonstrate that such delivery rates were realistic having regard to wider growth proposed at Crawley and around Horsham.

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### **West of Kilnwood Vale**

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- 5.20 Further land is being promoted for development to the west of Kilnwood Vale where a new neighbourhood of 2,500 homes is already being built out. Crest Nicolson are the master developer of this. This land parcel of c. 35 ha has a capacity for 800 homes, situated to the east of Faygate Railway Station. The site is being promoted by Crest Nicholson which has entered into an option agreement with the landowners.
- 5.21 Strategic infrastructure has been brought forward as part of the development of the existing neighbourhood at this location, which was granted outline consent in 2011 and where c. 900 completions have occurred to date. Infrastructure delivered includes 2 new junctions on the A264 and a 2 form-of-entry primary school. There are 3 developers currently delivering homes.
- 5.22 The Council's base housing trajectory considers that the existing Kilnwood Vale strategic allocation will be completed and built-out by 2025/6. Iceni considers that the phasing of delivery of the additional growth through extension of this site would be phased to maintain development at this location with initial completions thus phased in 2024/5. This site would thus be build-out by 2032/33 at the latest.

### **Land at Kingsfold, Warnham**

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- 5.23 This potential strategic site is located east of Kingsfold, approximately 3km north of Horsham. The site is proposed for a development of 1,300 dwellings across five new villages, centred on the existing settlement of Kingsfold and along the A24. Development is proposed both east and west of the Sutton and Mole Valley railway line which divides the site into eastern and western parcels. The proposal includes, 35% affordable housing, sheltered/ care home accommodation, nursery, a primary school and open space and sports pitches. 75,000sqm of business floor space will also be provided.
- 5.24 In terms of infrastructure the scheme would deliver an A24 relief road around the existing settlement of Kingsfold. The promoters have indicated the scheme might also enable the relocation of the existing Warnham Station, although at the current point in time no business case has been put forward for this and it is not clear whether this would be endorsed by Network Rail or the Train Operating Companies.
- 5.25 We understand that whilst there are a number of landownerships, as is to be expected for a scheme of this scale; but that there is a single promoter in place with potential for a comprehensive scheme to come forward. Land to the west of the railway line is envisaged to be brought forward first. The Phase 2 development proposals include provision for a 75,000 sq.m extension to the Broadlands Campus business park.
- 5.26 It is envisaged that Hayfield Homes will be directly involved in development, acting as lead developer, and will work with other local housebuilders to build bespoke elements of the scheme. There is

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potential for three housebuilders to be constructing concurrently with up to 4 sales points; and for delivery of build-to-rent and retirement living development.

- 5.27 The promoters envisage bringing forward a hybrid planning application immediately following the allocation of the site, which includes a detailed application for Phase 1. They envisage that this will achieve planning consent in Q1 2022 allowing first completions in 2023/24. Iceni assume first completions in 2024/25 is more realistic given the scale of the scheme; and that a build-out rate rises over time to 200 homes per year. This sees completion of the scheme in 2033.

### **Land at Rookwood, Horsham**

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- 5.28 The strategic site located at Rookwood Golf Course is on the western side of Horsham, between the urban area and the A24. It comprises a total of 109 ha of land with capacity for around 1,000 homes over the plan period, with 39 ha of land being retained as a Nature Reserve.
- 5.29 The land is in a single ownership and is owned by Horsham District Council. Iceni understands that the Golf Club's lease expires in 2022/3.
- 5.30 The site comprises a mix of open fairways, greens and areas of rough grassland and trees; divided into a northern and southern section, separated by the B2237, Warnham Road. The northern section of the site adjoins Warnham Nature Reserve to the east, and the southern section of the site adjoins the built form of Horsham, in a predominantly residential part of the town.
- 5.31 To support development, a new roundabout on Warnham Road would be required to provide access and the scheme would need to deliver a new primary school; but there appear to be otherwise limited strategic infrastructure requirements associated with this site based on the information currently available.
- 5.32 At present, the delivery model for the site has yet to be determined; with the Council likely to work with a development partner to build out the scheme whilst maximising control to ensure design principles are followed. The intention is to progress a planning application immediately on adoption of the Local Plan at the end of 2021 subject to successful allocation.
- 5.33 The Council anticipate construction starting on site within 3 to 4 years following the submission of a planning application; however, this is to be confirmed once a development partner has been brought on board.
- 5.34 Iceni would advise that if this site is to be taken forwards, further technical work will need to be progressed in the short-term to demonstrate its suitability and deliverability. It would also be

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advantageous to appoint a development partner, with a view to demonstrating at Examination that the site can be regarded as deliverable.

- 5.35 Given the intention to bring forward a planning application post adoption of the Local Plan Review, Icení has assumed initial completions from this site in 2026/7. Given the strong relationship to Horsham Town we would consider delivery of 200 homes pa could be achieved; resulting in the delivery of 1,000 homes within the plan period.

#### **Land West of Southwater**

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- 5.36 The strategic site located to the west of the village of Southwater is comprised of 140 ha of land and is being promoted by Berkeley Strategic for 1,200 homes with the Plan Period. The land is currently owned by The Fletcher Trust & Christ's Hospital School; and a promotion agreement is in place with both landowners. An illustrative masterplan has been developed for the site.
- 5.37 Berkeley Homes intend to build out the development with one sales point; with first completions anticipated in 2024/25. Berkeley are currently delivering homes at the Broadacres development which lies adjacent to the west of Southwater site. Sales at this site are circa 1 per week. The west of Southwater site has sustained delivery rates of 66 dwellings per annum in recent years.
- 5.38 The intention is that the Broadacres development will be built out in 2026 and in the years leading up to this, Berkeley will transition onto the delivery of homes on the west of Southwater site to deliver homes simultaneously with anticipated first completions in 2024/25. Berkeley indicate an expected delivery rate of 100 dwellings per annum from 2026/27 onwards resulting in the build-out of the development over the plan period to 2036.
- 5.39 Icení consider that it would be more realistic with a single developer in place to assume a lower build-out rate roughly in line with the build-out rate achieved on Berkeley's existing scheme; and have therefore assumed delivery of 70 dwellings per annum. This would support delivery of around 820 homes at this site over the plan period to 2037.
- 5.40 As part of the development, the signalisation of the A24 Hop Oast junction is required; as well as improved pedestrian and cycle crossing of the A24 to the south of Hop Oast; a new education provision. Improved transport links to Christ Hospital Station is required including a new link road. However, overall there are no evident showstopping constraints based on the current available information.

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### **East of Billingshurst (Little Daux)**

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- 5.41 This strategic site located to the east of Billingshurst. Billingshurst is located 10km south west of Horsham. The site, located to the north of the railway line, is being promoted by Bellway Homes for 650-700 within the plan period.
- 5.42 A Masterplan has been prepared and is being updated. A range of technical site assessment surveys have been undertaken. It is anticipated a planning application will be submitted to align with the Local Plan Regulation 19 consultation. This consultation is currently scheduled for September/October 2020 with the site promoters' indicating the expectation to be on site by summer 2021, with first completions in 2022. Two developers will build out the development including market, affordable and self-build homes. The promoters expect a build-out rate of 100 dpa.
- 5.43 To facilitate the development, a new access route and associated roundabout off the A272 is required as well as secondary vehicle accesses linking to the existing village. There is a lack of detail regarding sewage/drainage improvements which may be required. The site benefits from proximity to Billingshurst Rail Station.
- 5.44 Iceni consider initial completions in 2023/4 to be more likely, allowing time for an outline application to be considered; but consider the build-out rate put forwards to be realistic. It is not dissimilar to existing build-out rates being achieved by Bellway on the existing site on Land East of Billingshurst.<sup>9</sup> This sees the site built out by 2029.

### **Land West of Billingshurst**

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- 5.45 This strategic site is located to the West of Billingshurst, to the west of the A29. It consists of 75-100 hectares of land, currently comprising agricultural fields and is being branded 'Newbridge Park.'
- 5.46 The northern part of the site is c. 7 ha in size; and the southern part c. 69 ha. The masterplan indicates that of this, there is 23.5 ha of land identified for residential use which could support 850-1000 homes depending on the development density. A 2FE primary school and employment provision is also proposed, together with 2.4 ha for a care village with 65 assisted living units and extra care facility.
- 5.47 The land is in a single ownership and is being promoted by Arunway, a company owned by the landowner. At the current time there is no developer involvement. Initial technical assessment has been undertaken addressing ecology, highways, drainage, landscape etc.

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<sup>9</sup> 91 units in 2019

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- 5.48 The promoter has indicated that the scheme could support improvements to the A29 Hilland roundabout at the northern side of the village to through provision of a jet lane to increase capacity. An improved layout of the junction between the A272 and Lordings Road could also be delivered; together with a financial contribution to the potential upgrading of the A272 bridge over the River Arun to the west of Billingshurst.
- 5.49 In respect of education infrastructure, there are proposals for primary school provision on the site. The promoter indicates that through discussions with WSCC the catchment area boundaries for secondary schools could be amended to accommodate additional growth in this area.
- 5.50 In respect of delivery timeframes, the promoter has suggested that a planning application could be submitted immediately post adoption of the Local Plan. They envisage that an outline planning approval and initial reserved matters approvals could be achieved by early 2023, allowing a start on site mid 2023 and first completions mid 2024. Two, or potentially three, sales outlets could be achieved. The promoter indicates a build out rate of 150 pa from 2026, achieving site completion in 2032.
- 5.51 Icen consider that if this site is taken forwards, initial completions in 2025/6 might be achievable. With a build-out rate of 100 pa – which we consider more realistic assuming involvement of multiple developers - the full 850-1000 homes could be delivered within the plan period.

#### **Land at Buck Barn, West Grinstead**

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- 5.52 The strategic site, situated at West Grinstead, comprises 165 ha of developable land and is being promoted by Thakeham Homes as the proposed developer for 3,500 homes. The site is privately owned by two individuals and there is a promotion agreement in place.
- 5.53 To facilitate the development, major infrastructure highway works are required including a new junction at the A24/A272 interface; improvements to A24 and A272 and a range of education-related provision including three new schools, care and community infrastructure. The substantial infrastructure requirements could impact on the viability of the scheme; and as with the other major new settlement proposals it seems likely that there would be a requirement for public funding support.
- 5.54 A masterplan has been prepared for the site which has been subject to revisions to reflect comments from the Council and public exhibitions. Technical work has also been carried out which seeks to demonstrate how the new junction and highway improvements can be delivered; but further transport modelling work is intended to be undertaken. Technical work on other matters such as ecology and flooding has also been carried out.

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- 5.55 Thakeham have indicated their intention is to submit a planning application in early 2022 on the basis that the Local Plan is adopted at the end of 2021. The developer indicates that the site is expected to deliver 200 dwellings in 2024/25 and 300 dwellings per annum each year up to 2036, with final competitions in 2036. A PPA is in place with the Council and it is expected that this will continue to evolve as the plan-making process progresses; however, it is also noted that an application could be submitted earlier.
- 5.56 The developer expects to commence construction on-site in Autumn 2023 with first completions in spring 2024. The development would principally be built out by Thakeham Homes. Two sales outlets are envisaged reflecting Thakeham Homes' Alphium brand and the main Thakeham brand. Some delivery of specialist retirement housing is envisaged; and Thakeham would consider selling some parcels to its housing association contracting partners to achieve potentially 4-5 sales outlets. IcenI understand that Thakeham could bring forwards some homes through modular construction.
- 5.57 IcenI consider that considering the scale of the scheme and planning complexities, initial completions in 2025/6 is more likely; and that based on the current information available the scheme could sustain a peak build out rate of 200 dpa. Detailed evidence would be necessary to justify a higher build out rate than this. This would see delivery of c. 2,100 dwellings from this site over the plan period to 2037.

#### **Land North East of Henfield (Mayfield Market Town)**

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- 5.58 The strategic site at land between Sayers Common and Henfield is comprised of a total of 339 ha of land and is being promoted jointly by Mayfield Market Towns Ltd and Clarion Housing Group for up to 5,000 homes during the plan period with a further 2,000 homes possible beyond the plan period (within Horsham District). There are a number of parcels of land spread across the site under separate ownerships. IcenI understands that Mayfield currently controls 123 ha of land and is in advanced negotiations for 135 ha.
- 5.59 A masterplan has been developed for the whole site and work has commenced on designing the first phase detail, including part of the town centre. The intention is to align the submission of an outline planning application with the adoption of the Local Plan; however, it has been indicated that a planning application could be submitted by the end of 2020. The intention is to submit a reserved matters application for the first phase of development comprising 250 homes immediately after the outline planning application is submitted. A PPA is in place with the Council.
- 5.60 In terms of infrastructure provision, a Southern Link Road is required within the site as well as off-site highway improvements and an Eastern Link Road. A new grade separated junction would be needed on the A23. There is also the need for the undergrounding of 132kv cables (the cost of which we understand to be c. £4 million and would take c. 3 years to deliver) and a new sewage treatment

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works after 2,500 homes. There is existing waste water treatment capacity for the first 750 homes and with improvements to the Henfield Waste Water Treatment Works up to 2,250 homes could be accommodated; beyond this a new WwTW would be required which we understand could be delivered onsite. Initial development of 2,500 homes could be supplied with existing gas infrastructure and 1,900 homes for power; beyond which reinforcement would be required. There are thus significant strategic infrastructure requirements needed to support this site.

- 5.61 The substantial infrastructure requirements could impact on the viability of the scheme; and as with the other major new settlement proposals it seems likely that there would be a requirement for public funding support.
- 5.62 The promoter has provided Iceni with a phasing programme which shows site infrastructure works to commence within 6 months following the receipt of reserved matters approval; with first completions within 12 months of reserved matters approval around the end of 2022/23. It shows delivery rates start at 50 dwellings per annum in 2023 raising to 450 dwellings per annum in 2031 and thereafter. The promoter indicates that in the first 5 years Clarion will deliver both affordable and private homes, with the addition of 3 to 5 housebuilders rising to 8 to 10 housebuilders at the height of the build which will range from small local builders, self-build providers, specialists in retirement, PRS, care homes and medium size national house builders.
- 5.63 Where this site is located, on the edge of the District, and the relationship between this location and the main service centre of Burgess Hill, means that it is likely to require a level of collaboration between Horsham and Mid Sussex District Councils not least as some of the infrastructure required to support delivery of a new settlement at this location and connect it to the A23, would fall within Mid Sussex. It seems likely that given the scale and cross-boundary nature of the site, a Joint Area Action Plan would need to be prepared jointly by these authorities together with West Sussex County Council (as the highways and education authority). Mid Sussex District Council is not currently progressing a Local Plan Review. Realistically, this is likely to influence the delivery timescales for this site.
- 5.64 Given the potentially significant time therefore likely to be necessary to put in place a strategic policy framework for this site on a cross-boundary basis, and then determine what would be a large and complex planning application (or applications), Iceni has assumed that this site would not deliver completions before late 2028/9. This would also see this site coming forwards as strong delivery from existing commitments in Burgess Hill and Hassocks starts to tail off.
- 5.65 There are few examples of major strategic sites sustaining delivery rate of over 250 dpa. Whilst recognising the importance of delivery at pace to creating a viable and attractive place to live, we have modelled a peak build-out rate for this site of 250 pa. Our assumptions thus see this site potentially contributing c. 1,850 dwellings over the plan period.

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## Land at Adversane

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- 5.66 The strategic site at Adversane is located at and surrounding Steepwood Farm. It comprises 150 ha of land and is being promoted by Our Place for 3,500 homes, 2,385 of which they indicate will be provided with the plan period to 2036. The site is part owned by Kingswood Village Developments, Eton College and Chichester College, with legal agreements in place in favour of Kingswood Village Developments.
- 5.67 As part of the development, a range of major infrastructure provision is required, including the re-routing of the B2133 through the site enabling closure of the Adversane level-crossing; construction of a bridge over the Arun Valley railway line to facilitate the closure of the level-crossing and the construction of a new roundabout of the A29. Detailed negotiations with Network Rail would be required to progress the delivery of a new bridge which could influence the timing of development.
- 5.68 A 6-8 FE through school and additional 2-3 FE primary will also be required on site. An illustrative masterplan has been prepared alongside technical site survey work.
- 5.69 To facilitate development, water supply upgrades will also be needed to support development above 1,335 dwellings. Confirmation that the site can be serviced for gas is still required.
- 5.70 The substantial infrastructure requirements could impact on the viability of the scheme; and as with the other major new settlement proposals it seems likely that there would be a requirement for public funding support.
- 5.71 Our Place are acting as master-developer and will self-deliver the development and work in partnership with selected developers to build-out serviced parcels. Their proposals include built-to-rent, self-build and retirement living, as well the provision for employment space. Employment floorspace proposals envisage 1 job per home.
- 5.72 Our Place anticipates the submission of a planning application to coincide with Regulation 19 of the Local Plan at the end of 2020. They anticipate that the construction of Phase 1 and upfront infrastructure will begin in 2023 with first completions in 2025. A build out rate of 60 to 150 dwelling per annum is anticipated in the first five years, increasing to 150 dwellings per annum by 2028 and 230 dwellings per annum by 2031, with 3500 homes delivered by 2034. Up to 4 sales points at peak are envisaged.
- 5.73 Iceni consider that considering initial completions in 2025/6 is reasonable; and that based on the current information available it would be more reasonable to assume that the scheme could sustain a peak build out rate of 200 dpa. Detailed evidence would be necessary to justify a higher build out rate than this. This would see delivery of c 2,100 dwellings from this site over the plan period to 2037.

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### **Inter-relationships between Sites**

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- 5.74 The above analysis has been based on the potential delivery trajectory considering individual sites on their own. There are however potential inter-relationships to consider at a localised level should multiple strategic sites be identified which could affect build-out rate assumptions. These issues are explored further in Section 6.
- 5.75 There are for instance clear questions regarding market capacity/absorption to be considered in respect of growth in and around Billingham, noting the relative proximity of sites East and West of Billingham and the new settlement proposal at Adversane. Similarly there are a number of potential sites on the western side of Crawley. We consider these issues further through the development and testing of sub-area trajectories in the next section.
- 5.76 Similarly there are potential issues of market capacity in the northern part of the Borough, and it will be important for instance to take account of the proximity of proposals at Buck Barn and Southwater to Horsham; and the proximity and inter-relationships between Horsham and Crawley. Iceni has also had regard in considering the delivery of the Land north-east of Henfield proposal to the timing and pace of delivery in Hassocks and Burgess Hill. These issues are considered further in the next section.

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## 6. FUTURE POTENTIAL TRAJECTORIES FOR HOUSING DELIVERY

- 6.1 In this section we move on to consider and appraise future potential trajectories for housing delivery in Horsham District. The analysis in this Section in particular considers the overall market capacity to sustain different levels of development.

### Overview of Methodology

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- 6.2 Icení's view is that likely influences on the feasibility of delivering different levels of housing growth in Horsham District as a whole include where housing growth is planned within the District, and what housing growth is coming forwards in surrounding areas particularly in locations which are not within the District but are in close proximity to it.
- 6.3 We consider that the level of housing growth which could be accommodated, from a market capacity perspective, in the north of the District will be influenced by what scale of development is coming forwards within Crawley Borough. Similarly, there is a potential relationship between what strategic growth could happen in the eastern part of the District and what is planned in adjoining parts of Mid Sussex (noting in particular plans for significant strategic growth at Burgess Hill). The rates of development achievable in the south of the District could also be influenced by what is happening in the nearby towns along the Sussex Coast, although this is likely to be a lesser issue given the level of growth in these areas is likely to be lower as they are constrained by geography – they principally sit within a narrow fairly build-up belt sandwiched between the Sea and the South Downs National Park and see overall low rates of housing delivery as a consequence.
- 6.4 Our analysis has therefore involved the following:
1. Base Trajectory – we have taken the base trajectory from the Council's latest 2018/19 Annual Monitoring Report. This addresses the expected build-out rates of sites which currently have planning consent or are allocated for development. We have adopted the phasing of development set out therein.
  2. Base Sub-Area Trajectories – we have developed base trajectories for three different sub-market areas, taking account of the trajectory of housing provision within these areas in Horsham District as well as within Crawley and in the Burgess Hill area to ensure that we have a basis for considering how the spatial distribution of development could affect delivery potential and potential cross-boundary market influences on market capacity.
  3. Overlaying Potential Development Scenarios – we have then overlaid potential development scenarios provided by Horsham District Council. These are strategic spatial scenarios which

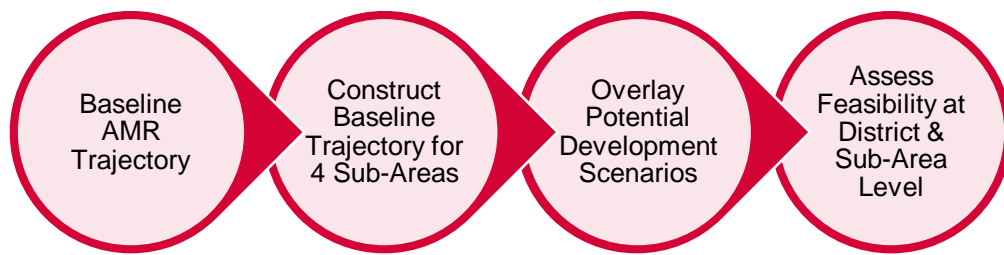
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consider both alternative levels and spatial distribution of growth through different combinations of strategic sites. Icení has appraised the potential phasing and pace of delivery on individual strategic sites based on information provided by the Council and promoters, and sought to take a view on this based on our experience and what the wider trajectory within the relevant scenario shows (as described in Section 5).

4. Conclusions on the Feasibility of Different Scenarios – we have drawn the analysis together to draw conclusions on the feasibility of different scenarios from a market capacity perspective.

6.5 The diagram below provides an overview of the methodology adopted.

**Figure 6.1: Overview of Methodology**



- 6.6 The initial construction and development of trajectories relies on information which pre-dated the Coronavirus pandemic, the impact of which is considered separately towards the end of the section.

### **Base Trajectory**

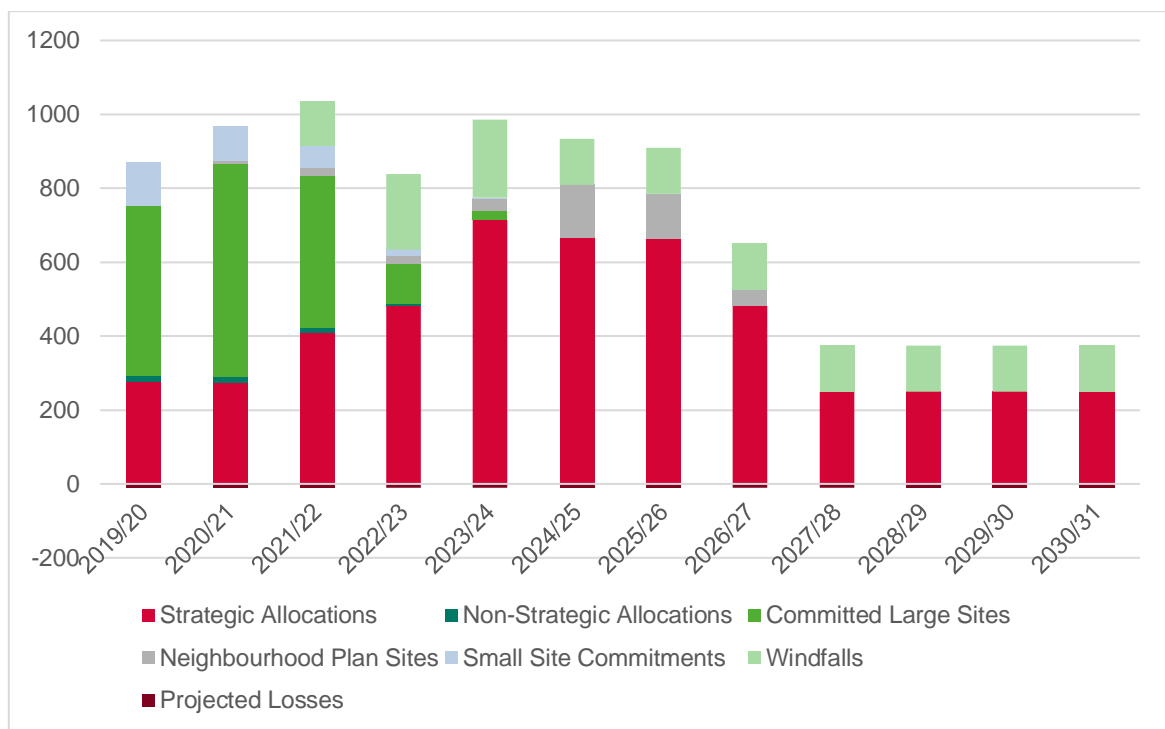
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- 6.7 The base trajectory is drawn from HDC's 2018/19 Annual Monitoring Report, as published in December 2019. This considers the delivery of sites with planning consent in the District together with outstanding allocations from both the Horsham District Planning Framework and neighbourhood plan sites. It provides a 'base' on which alternative scenarios for additional growth to be identified through the Local Plan Review can be overlaid.

- 6.8 The base trajectory sees average housing delivery over the 2019-31 period of 715 dwellings per annum, with one year seeing delivery of over 1,000 homes. The delivery by five year period averages 930 dwellings pa between 2019-24 or over the 2021-26 period which is a level of housing growth which is relatively similar to that achieved in the District over recent years (960 dpa average since 2013) and slightly below that over the last 5 years (1028 dpa, 2014-19). This looks to be a level of development in the short-term which we would consider to have been realistic.

- 6.9 Beyond 2026, the trajectory sees housing delivery start to fall off. Taking account of the intended adoption of the Local Plan Review in late 2021 or 2022, it seems likely that the delivery of strategic sites identified in the new Local Plan can start to come forward at about the time when delivery from existing identified sites is starting to drop off. The timings associated with the preparation of the Local Plan Review are advantageous in this respect; as sites which are already allocated or have planning consent will contribute to five year housing land supply at the point of adoption of the Local Plan Review.
- 6.10 We calculate a growth rate in the housing stock in Horsham District of 1.2% pa over the period to 2026, which then falls (based on the supply identified in the baseline trajectory) to 0.9% pa over the 2026-31 period. Other authorities within the South East region have sustained higher housing delivery rates than this, as the evidence in Section 4 shows. The evidence suggests potential to introduce additional supply through a new Local Plan both in the period to 2026, and in particular for the subsequent decade (2026-36).

**Figure 6.2: Base Housing Trajectory from Horsham's 2019 Annual Monitoring Report**



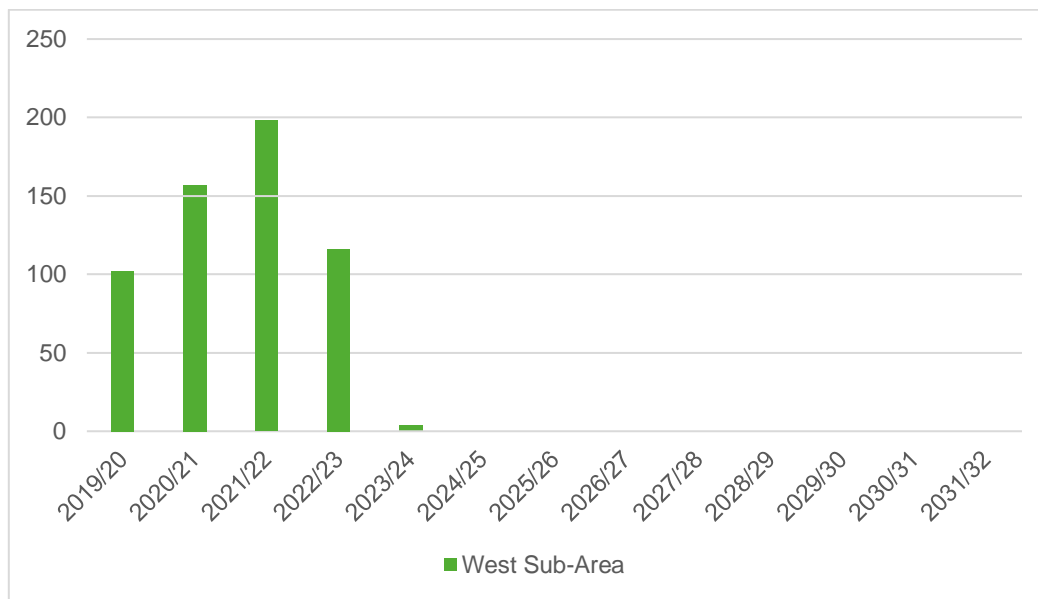
Source: Iceni analysis of HDC 2018/19 AMR

### Base Sub-Area Trajectories

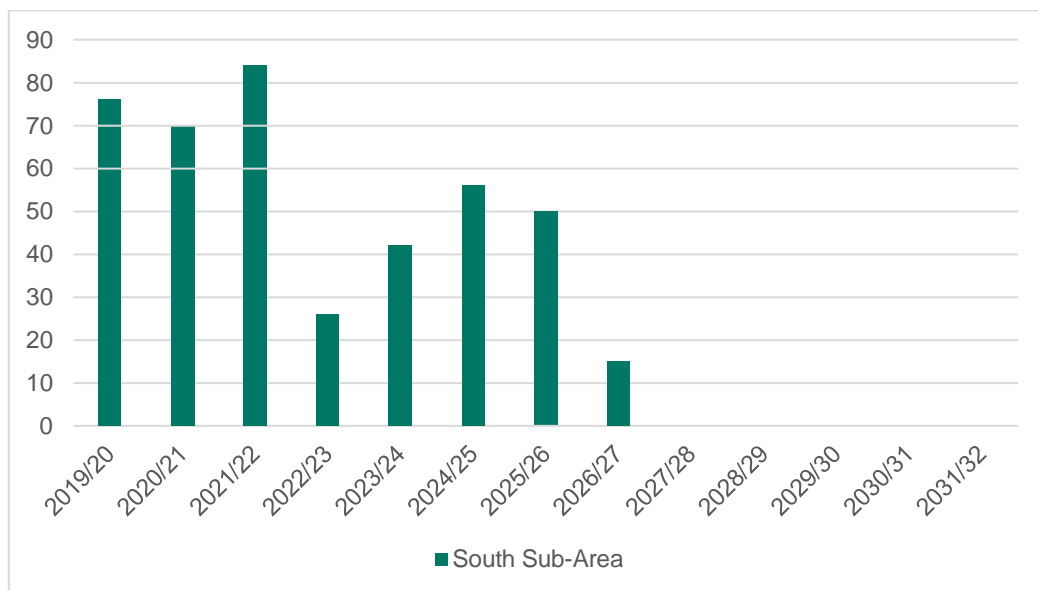
- 6.11 Iceni has sought next to break down the base trajectory to consider the distribution of development within it within the different sub-market areas (internal to Horsham District).
- 6.12 The three sub-areas are:

- North: Horsham Town, Broadbridge Heath and Southwater together with surrounding parishes including Colgate, Cowfold, Itchingfield, Lower Beading, Nuthurst, Rudgwick, Rusper, Shipley, Slinfold, Warnham and West Grinstead;
- South: comprising the parishes of Ashington, Ashurst, Bramber, Henfield, Shermanbury, Steyning, Storrington and Sullington, Thakeham, Upper Beeding, Washington, Wiston and Woodmancote;
- West: comprising the parishes of Billingshurst, Pulborough and West Chiltington. Adversane is assumed to relate to this area.

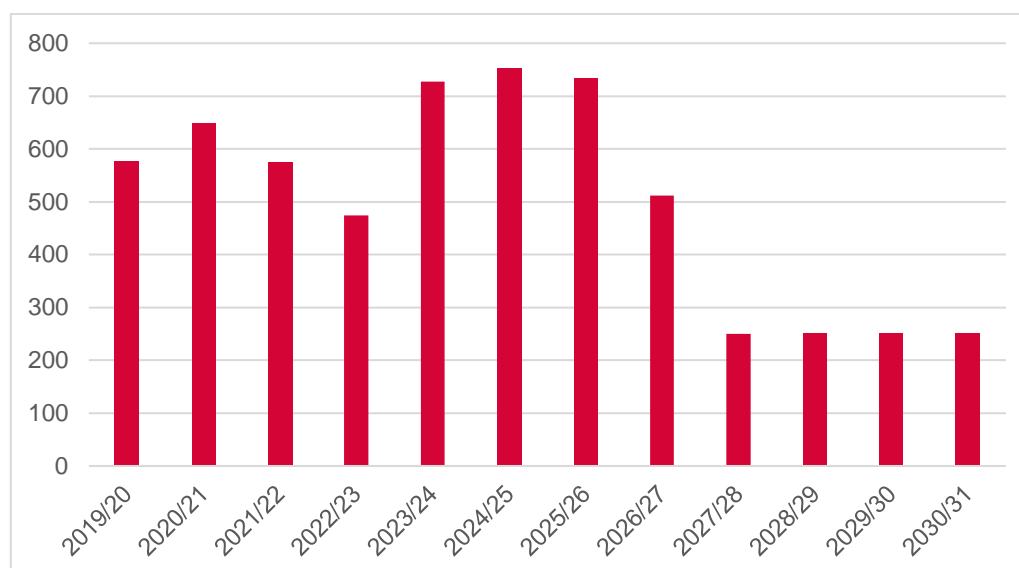
**Figure 6.3: Base Trajectory – West Sub-Area**



**Figure 6.4: Base Trajectory – South Sub-Area**



**Figure 6.5: Base Trajectory – North Sub-Area**



Source: Icen analysis of HDC AMR

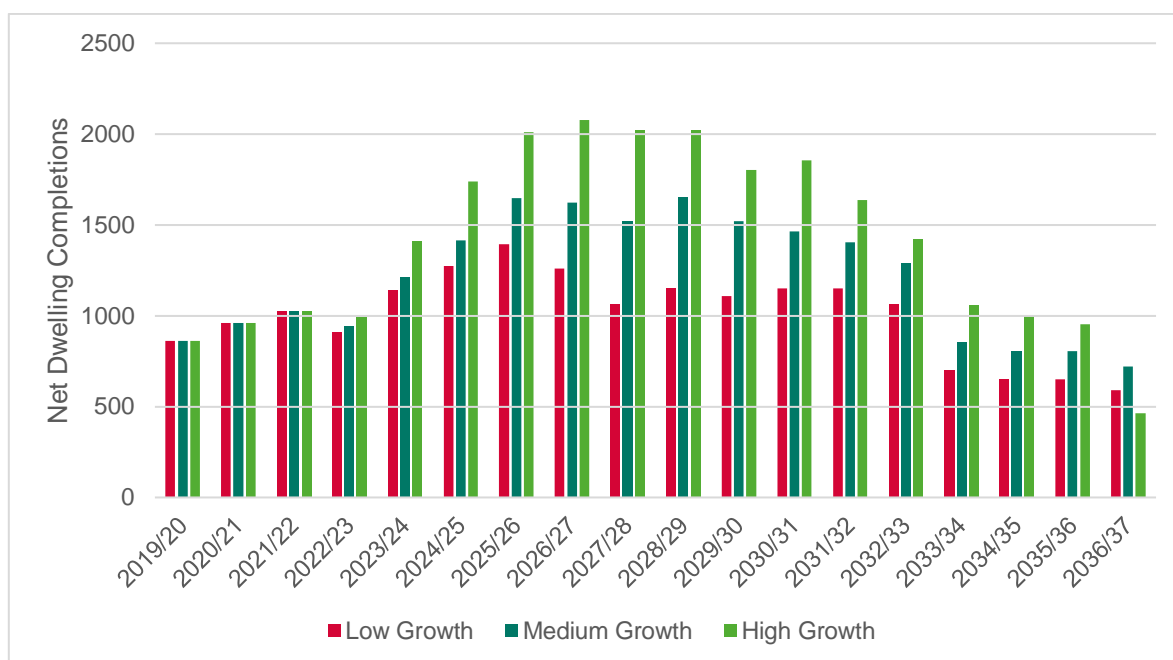
- 6.13 A comparison of the sub-area trajectories indicates that the focus of housing development in the existing trajectory is the North Horsham Sub-Area. This shows average delivery of 640 dpa over the period to 2026 in the base trajectory before housing delivery starts to drop off, a growth rate over the 2019-26 period of 1.6% pa. However considered over the period to 2031, the growth rate drops off to an average of 1.3% pa. The evidence suggests potential to introduce additional supply, in particular post 2026 in the northern part of the District.
- 6.14 The West Sub-Area shows a relatively modest level of development in the current trajectory, with limited sites expected to deliver beyond 2023. Similarly the South of the District Sub-Area includes completions averaging 58 dpa over the period to 2026, with limited sites expected to contribute to delivery thereafter. The growth rate in the housing stock envisaged in the existing trajectories in these areas is modest at 0.2% pa in the South and 0.6% pa in the West over the period to 2031. The evidence points to market capacity to support additional supply.

### **Potential Local Plan Review Development Scenarios**

- 6.15 Icen has next sought to overlay potential development scenarios for growth which have been identified by HDC and tested through the Sustainability Appraisal accompanying the Regulation 18 Draft Local Plan in Spring 2020.
- 6.16 The Council's draft Local Plan Consultation has set out three scenarios for how much housing provision could be delivered in the District, setting out three scenarios:

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- Delivery of 1,000 homes per year – this would meet the district's local housing need as determined by the standard method (965 dpa) but would not provide any additional housing towards the unmet needs of Crawley or the Sussex Coast;
  - Delivery of 1,200 homes per year – this would meet the district's local housing need and would provide around 200 homes per year to help meet unmet needs of Crawley, and a small element of unmet need from the Coastal Sussex area;
  - Delivery of 1,400 homes a year – this would meet the district's local housing need and would provide around 400 homes each year to help meet the unmet needs of Crawley and the Coastal Sussex area.
- 6.17 Icení has treated these scenarios as scenarios for the 'housing requirement' within the Plan. Over the 18 year plan period they thus represent scenarios for how much growth would need to be delivered. For the three scenarios this thus ranges from 18,000 dwellings in the low growth scenario; to 21,600 dwellings in the medium growth scenario; and 25,200 dwellings in the high growth scenario. These figures include all development already permitted, and sites allocated in 'made' neighbourhood plans, as well as an allowance for as-yet unidentified windfall development. 'Commitments' such as these make up a significant component of future supply, particularly over the period to 2026.
- 6.18 Icení has worked to construct a 'notional' housing trajectory associated with each of these options related to the level of development which is expected to come forwards. The precise trajectory will be influenced by the nature, size and location of sites identified and complexities associated with bringing forward the strategic sites allocated. What our analysis shows is the potential shape which a trajectory might take based on overlaying for each scenario details of the potential timing and pace of delivery on strategic sites, using the analysis in Section 5, on the base trajectory; and assuming that small sites are build out at a fairly consistent rate from adoption of the Plan over the remainder of the plan period.
- 6.19 The Figure below shows the notional housing trajectory associated with each of the three scenarios for the scale of growth.

**Figure 6.6: Indicative Trajectories associated with different Growth Scenarios**



6.20 The broad shape of the trajectory over the plan period is the same for each of the scenarios, albeit that the low growth option shows an earlier peak of delivery in 2025/6. The medium and high growth scenarios envisage housing delivery of over 1500 homes pa being sustained from 2025/6 – 2029/30 and over 1,000 homes pa being achieved over a sustained period to 2033. The High Growth Scenario with this trajectory would see over 1,950 homes pa completed each year over a five year period from 2026-31.

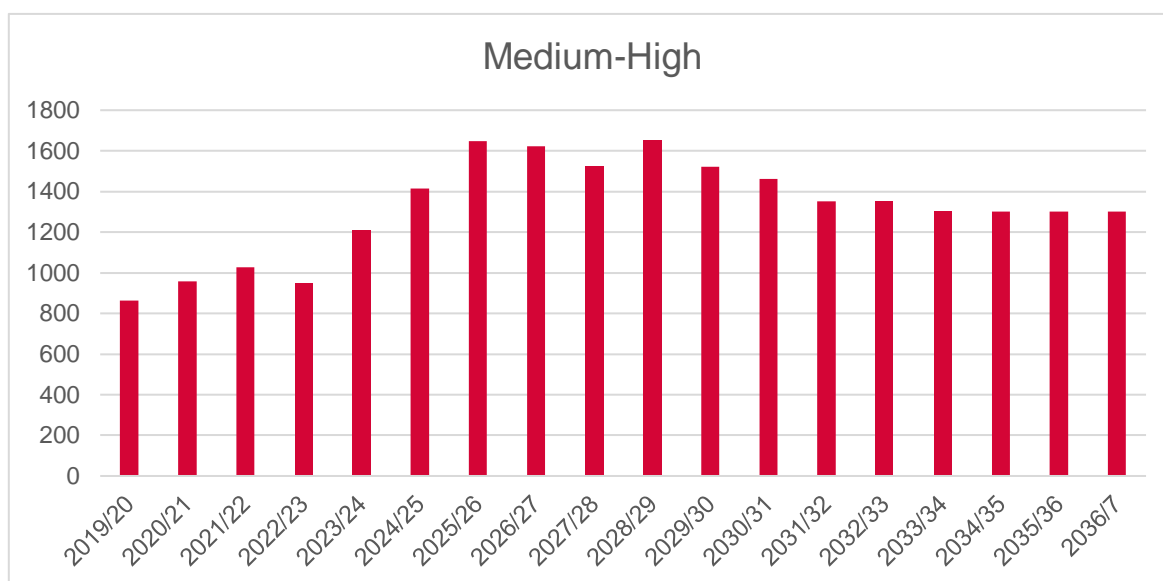
6.21 IcenI has sought to test the realism of these rates of delivery by appraising what rate of growth in the housing stock this would imply. This is set out below.

**Table 6.1 Rate of Stock Growth in Horsham District implied by Growth Scenarios**

	2021-6	2026-31	2031-37	2019-37
<b>Low Growth</b>	1.7%	1.5%	1.0%	1.4%
<b>Medium Growth</b>	1.8%	2.1%	1.2%	1.6%
<b>High Growth</b>	2.1%	2.6%	1.3%	1.9%

6.22 Over the plan period, the Low Growth Scenario of 1000 homes pa would represent a growth rate in the housing stock of 1.4% per annum. This is below the rate of growth sustained in recent years in Horsham District (1.5% pa 2012-19 or 1.8% pa 2014-19). There are a range of South East local authorities which have achieved and sustained above this level of housing delivery historically. This scenario thus looks achievable from a market capacity perspective. The housing delivery rates implied over 5 year periods of up to 1.7% pa all appear realistic against recent delivery.

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- 6.23 The Medium Growth Option of 1200 homes pa would see development rates over the plan period equivalent to 1.6% per annum stock growth in Horsham District. This is towards the higher end of the spectrum relative to other comparator areas considered in the Section 4 analysis. Areas such as Test Valley and Aylesbury Vale have achieved similar growth rates. It is below the housing delivery rate achieved over the 2014-19 period in Horsham District at 1.8% pa. This is potentially achievable but more ambitious. It is a level which Iceni consider could however be supported given the characteristics of the District's housing market, in that this is a relatively high value market; it is surrounded by a number of more constrained areas where the wider sub-region; and there is a relatively strong economic growth potential at a district and sub-regional level. It would need to be planned for in a comprehensive way through the Local Plan Review process and see growth at a range of locations across the District.
- 6.24 This scenario however sees growth in the stock of 2.1% pa over the 2026-31 period in the notional trajectories constructed by Iceni, with delivery rate of over 1,500 homes pa. Iceni considers that this is likely to be towards the top end of what could potentially be considered achievable with limited evidence of other areas being able to sustain a housing delivery rate at this level. However there is the potential to 'flattened the peak' through adjusting the trajectory to see higher housing delivery in the period from 2031-37
- 6.25 The High Growth Scenario would essentially imply a need to sustain an average of 1.9% pa stock growth over a considerable, 18 year period. These levels of delivery are at the top end of the range of what other districts within the wider South East have achieved historically over shorter timescales; but there is no evidence that this level of housing delivery could be supported over a full 18 year plan period over a full housing market and economic cycle. There is evidence of Horsham District getting near to this level of housing delivery in individual years, such as with the delivery of 1,368 dwellings in 2018/19; but Iceni would question whether there is the ability to sustain this over the plan period as a whole. This scenario would in effect require the District to sustain housing delivery rates of around 2.5% pa over part of the plan period which we consider is potentially overly ambitious based on historical performance and the benchmarking of what has been achieved elsewhere. The evidence thus suggests that this scenario is likely to overly-ambitious and there would be clear delivery risks associated with achieving it.
- 6.26 In considering absolute numbers, the timing of delivery of different levels of growth needs to be considered. There will be a lead-in time for housing delivery of say 1,400 dpa to be achieved. Our analysis would suggest that pushing the delivery rates as hard as they could potentially go, housing delivery rates of 1,400 homes pa could potentially be sustained over the period from 2025 onwards assuming buoyant macro-economic conditions. A trajectory in this scenario might look as follows. This scenario would deliver on average 1,300 homes pa over the plan period (equivalent to an average of 1.8% pa growth). But delivering an average of 1,400 dpa across the Plan period as a whole looks very challenging and a level to which we would attach significant delivery risks.



- 6.27 At a district-wide level, Iceni analysis prior to the Coronavirus pandemic indicated that the market would support provision of up to 1,200 - 1,300 dwellings per annum over the plan period as a whole. This would represent a housing delivery rate of 1.6-1.8% per annum which recent delivery performance in Horsham District does not suggest is unachievable, but is towards the top end of what other comparator areas have achieved, and we consider is likely to be at the top end of what can be achieved over a sustained period across the housing market/ economic cycle.
- 6.28 An indicative trajectory of how this level of growth might be phased over time is shown in Figure 6.7 above.
- 6.29 These findings are based on considering issues associated with market capacity. There are evidently other potential constraints which may influence the scale and pace of development, including the feasibility and timing of delivering new strategic infrastructure, which may influence the level and pace of housing growth which can be achieved.
- 6.30 Horsham District Council has asked Iceni to consider what impact the Coronavirus situation could have on what housing provision could be achieved. It is reasonable to expect that the Coronavirus will impact on the housing market in the short-term, as was explored in Section 4, taking account of both macro-economic factors as well as the impacts on employment and businesses in the aviation sector within the sub-region. Iceni has therefore constructed an illustrative scenario which seeks to explore what impact this might have on the housing market. To do so we have assumed that there is a reduction in housing delivery of 40% in 2020/1 (taking account of the effects of the lockdown), 20% in 2021/2 and 10% in 2022/3 relative to the figures in the base trajectory. This assumes a greater initial impact on the sub-regional housing market than is expected nationally, and slightly slower recovery. This would see housing delivery over the plan period fall by around 700 homes

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relative to the pre-Covid trajectories constructed. Taking this into account would suggest that provision of between 1,150 – 1,250 dpa on average over the plan period to 2037 was more realistic from a market capacity perspective, equivalent to a growth rate in housing stock of 1.6 – 1.7% per annum.

- 6.31 This assessment is however been undertaken at a time of significant uncertainty, and it would be appropriate to monitor the impacts which the Coronavirus situation has on housing delivery in the short-term and to review these findings in advance of the submission of the Plan.

### **Alternative Potential Spatial Development Scenarios**

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- 6.32 Horsham District Council has identified 7 potential alternative strategic spatial options (with 3 derivatives of Option 3).

- 6.33 The various strategic spatial options are as follows:

- Low Growth Options
  - 1. Low Growth – Urban Extensions
  - 2. Low Growth – New Settlements
- Medium Growth Options
  - 3a. Medium Growth – Urban Extensions and Land north-east of Henfield
  - 3b. Medium Growth – Urban Extensions and Land at Adversane
  - 3c. Medium Growth – Urban Extensions and Land at Buck Barn, West Grinstead
  - 4. New settlements and small sites
  - 5. Medium Growth - Urban Extensions and Small Sites
- High Growth Options
  - 6. High Growth - Urban Extensions and New Settlements
  - 7. High Growth – Urban Extensions and Small Sites.

- 6.34 The purpose of this report is not to comprehensively appraise the relative options, but to comment on their relative deliverability from a market capacity perspective (noting that issues associated with infrastructure requirements, delivery and funding will also influence deliverability). The Council will draw this together with work considering infrastructure requirements and timescales associated with

strategic sites, transport evidence for the Local Plan Review and the Sustainability Appraisal in considering the appropriate strategy to take forwards.

6.35 The table below sets out the strategic sites which make up each of the options, as identified by HDC.

**Table 6.2 Strategic Spatial Options for Development**

Sub-Area	Site/Location	1	2	3a	3b	3c	4	5	6	7
N	West of Ifield	3000		3000	3000	3000		3000	3000	3000
N	W of Kilnwood Vale Extn	800		800	800	800		800	800	800
N	North Horsham Densificati	500		500	500	500		500	500	500
N	Buck Barn, West Grinstead		2000				3000		3000	
N	Rockwood, Horsham	900		900	900	900		900	900	900
N	West of Southwater	1200		1200	1200	1200		1200	1200	1200
N	Kingsfold, Warnham							1000	1000	1000
W	Adversane		2000		2000		2000		2000	
W	East of Billingshurst	700		700	700	700		700	700	700
W	West of Billingshurst							1000	1000	1000
S	NE of Henfield		2000	3000			3000		3000	
S	Ashington	400		400	400	400		400		400
	Small Sites	550	2050	1200	2200	1200	3700	2200	0	5600
Total - LPR Sites		8050	8050	11700	11700	11700	11700	11700	17100	15100
Total Development Supply		15886	15886	19536	19536	19536	19536	19536	24936	22936

6.36 IcenI has sought to appraise each option to understand:

- The extent to which the option might deliver the relevant housing requirement; and
- Whether the option could generate localised issues of market capacity taking account of the geographical spread of growth across the different sub-market areas.

6.37 IcenI's analysis in Section 5 included consideration of the potential lead-in time and build out rate of strategic site options put forward in the Regulation 18 draft Local Plan. Our analysis identified what we considered to be a realistic assessment of what strategic sites could deliver over the plan period based on the information available to us. Based on this, there are a number of sites where we consider that the yield over the plan period could be lower than set out within the SA options. These are shown in the table below.

**Table 6.3 Assessment of potential supply from key sites over the plan period**

	<b>Option</b>	<b>Iceni expected supply within plan period to 2037</b>
<b>West of Ifield</b>	3000	2800
<b>West of Southwater</b>	1200	820
<b>Adversane</b>	2000	2,100
<b>North-East of Henfield</b>	2000 - 3000	1,850
<b>Buck Barn, West Grinstead</b>	2000-3000	2,100

- 6.38 The table includes each of the new settlement options where in Iceni's view the information currently available suggests that between 1,850 – 2,100 homes could be delivered over the plan period to 2037. Given the progress and delivery proposals for West of Ifield, this is considered to generate the greatest yield over the plan period of the strategic site options.
- 6.39 The implications of this is that a number of the spatial options on our assessment deliver less homes over the plan period than the Council has originally anticipated. Our assessment of the yield of the options as set out is set out in Table 6.4. This would equate to the level of supply shown in the housing trajectory.

**Table 6.4 Iceni assessment of potential yield of Spatial Options**

	<b>Growth 2019-37</b>	<b>Dpa</b>
<b>Option 1</b>	17,944	1,056
<b>Option 2</b>	17,613	1,036
<b>Option 3a</b>	19,553	1,150
<b>Option 3b</b>	20,813	1,224
<b>Option 3c</b>	17,713	1,042
<b>Option 4</b>	19,019	1,119
<b>Option 5</b>	21,113	1,242
<b>Option 6</b>	24,553	1,444
<b>Option 7</b>	24,361	1,433

- 6.40 Iceni would recommend that the Council give consideration to whether it is feasible and sustainable to identify additional smaller, non-strategic sites which can be included within the housing land supply within the Plan to address any shortfalls and ensure a sufficient supply-side buffer.
- 6.41 A distinction needs to be drawn in interpreting this between the housing requirement and how much land would need to be allocated. A level of land with capacity over the plan period for a higher level of housing delivery than the housing target would need to be made there is a need to ensure that there is some flexibility within the land supply to ensure that the Plan is deliverable over the plan

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period and this can be demonstrated at Examination. The level of flexibility would need to be considered taking account of the nature of the land supply and associated delivery risks.

- 6.42 It is common therefore to see local plans which included a supply of land (as contained within a housing trajectory) which can be built out over the plan period which is 10% or more above the minimum housing requirement figure in order to provide a level of flexibility to ensure that the plan is able to accommodate slippage or slower delivery of some sites than originally anticipated without the planning policy framework being rendered out-of-date by virtue of a lack of five year housing land supply or under-performance against the Government's Housing Delivery Test.
- 6.43 In addition in Horsham's circumstances, a number of strategic sites are likely to continue to deliver post 2037 and therefore the Plan is likely to make some provision for housing land to address needs over the longer-term.
- 6.44 The level of supply-side contingency which is needed over the plan period is a separate issue from the level of buffer to be included within the five year land supply (which is moved forward from later in the plan period).
- 6.45 Provision of 10% supply-side flexibility might mean in these terms that if the Council takes forward a housing requirement of 21,600 homes (1200 dpa), it should plan to show a housing trajectory with a supply of at least 23,800 homes over the plan period and that it might allocate sites to provide a total supply of nearer 25,800 homes taking into account that some of the larger strategic allocations would be built out in part beyond 2037.
- 6.46 In considering the appropriate contingency provision to make, the Council will need to take account of the nature of the spatial strategy taken forwards and risks to the delivery of key sites therein. Icení considers that as a preferred strategy emerges, the Council undertakes some scenario testing to explore for instance the implications of a delay in delivery of key strategic sites and implications which this would have on the ability to meet the housing requirement over the plan period and maintain a 5 year housing land supply.
- 6.47 We turn next to appraise whether localised issues of market capacity might arise through the combination of sites set out in the options the different sub-market areas within the District.

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### North Sub-Market

- 6.48 Our modelling has taken the base supply (within the existing trajectory) for the North of the District. We have then overlaid the growth scenarios. In doing so, we have assumed that c. 38% of small-sites development takes place within this sub-market.<sup>10</sup>
- 6.49 We have used Icení's assumptions regarding the delivery timescales for strategic sites as set out in Section 5. On this basis the 9 options set out in the Sustainability Appraisal see a level of development in this sub-area of between 10,200 dwellings (Option 2) and 16,700 dwellings (Option 6).
- 6.50 The table below appraises the growth envisaged in each scenario. Scenario 2 (Low Growth New Settlement Option) sees the lowest growth in this area at 1.3% per annum over the 2019-36 period. Scenario 4 (New Settlements & Small Sites) also shows a growth rate of 1.3% which is below the level of growth achieved in the District in recent years. Given that the historical delivery focus within the District has been for strategic growth in this sub-area (and thus delivery rates of above the district average are likely to have been achieved), 1.8% pa growth should not be considered as the maximum achievable.

**Table 6.5 Potential Growth Rates in North Sub-Market in Different Options**

North	Growth 2019-37	dpa	CAGR 2019-37
Option 1	13,448	791	1.6%
Option 2	10,178	599	1.3%
Option 3a	13,695	806	1.7%
Option 3b	14,075	828	1.7%
Option 3c	13,695	806	1.7%
Option 4	10,805	636	1.3%
Option 5	15,475	910	1.8%
Option 6	16,739	985	2.0%
Option 7	16,615	977	2.0%

- 6.51 Icení's view is that given the market characteristics and growth drivers which exist in this area including proximity/transport connections to Crawley, Gatwick and London and a concentration of existing economic activity and services, this area could sustain growth rates above the District average (and above those in other parts of the District) over the plan period as a whole. Scenarios 3 and 5 (medium growth scenarios) show growth of 1.7 – 1.8% per annum across the plan period. This

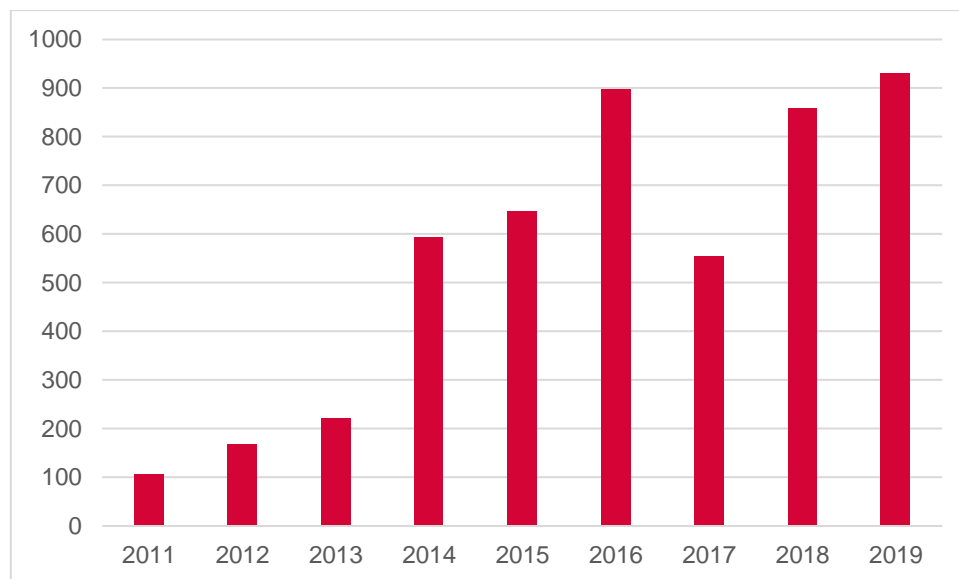
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<sup>10</sup> This is based on the Council's assessment of potential settlement growth taking account of sites which have been positively assessed as having potential for development in the SHLAA

is consistent with recent performance for the plan area (in which delivery has been focused in this sub-market). We do consider that these growth rates are achievable.

- 6.52 Scenarios 6 and 7 generate higher growth rates of 2.0% per annum. This is more challenging, but it is not necessarily unachievable for this part of the district. There are clearly however higher delivery risks associated with these scenarios, in particular in respect of the ability to sustain this rate of growth over an 18 year period which will cover a number of economic cycles.
- 6.53 The evidence points to a clear upward trajectory in housing delivery in this area, influenced by the delivery of strategic development schemes including at Broadbridge Heath, North Horsham and Kilnwood Vale. The last four years have seen average delivery rates of 810 dpa in this Sub-Area, and it is clear that it has accommodated the bulk of development in the District. Scenarios 1, 2, 3a, 3c and 4 all fall below this. Option 5 is marginally (c. 12%) above these recent delivery rates (2015-19) at 910 dpa. As we have explained, longer-term historical delivery rates in the north of the District are lower; but this is in a context of planning for a lower housing requirement.

**Figure 6.8: Recent Historical Completions in North Horsham Sub-Area**



Source: HDC Monitoring data

- 6.54 The higher levels of growth envisaged in Options 6 and 7 which sustaining imply completions at the higher end of around 950-960 dpa on average across the plan period appear more challenging with greater potential risks associated with market capacity which could impinge upon the delivery rate or aggregate delivery over the plan period based on consideration of the sub-area on its own.
- 6.55 In Iceni's view, consideration however also needs to be given to the scale of development within Crawley Borough as well. The Crawley base trajectory sees growth of 1.4% pa over the period to

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2026<sup>11</sup>, but with development levels falling off (based on currently identified supply) thereafter and in particular post 2028.

- 6.56 If we consider the growth rate envisaged looking at Crawley and North Horsham together, we find that the rate of growth envisaged is similar (and indeed slightly below) that achieved across Horsham District in recent years at 1.3% and is well within what other areas within South East England have achieved historically. This provides some confidence that the levels of growth in the higher options could be achievable from a market capacity perspective.

**Table 6.6 Appraisal of Growth Scenarios – Crawley and North Horsham**

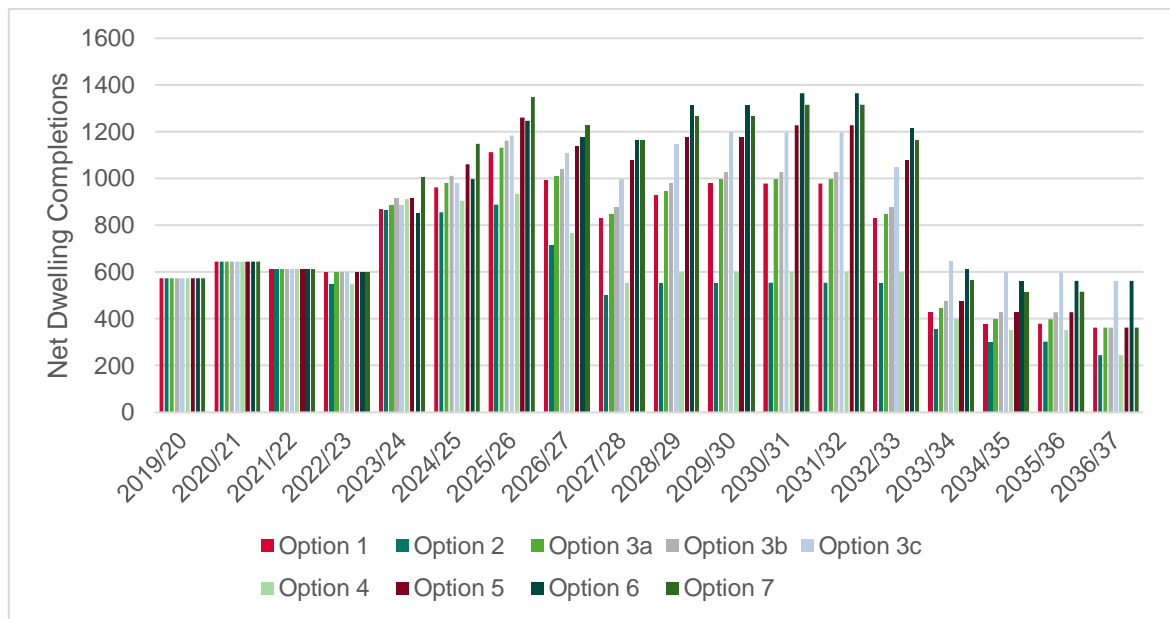
<b>Scenario</b>	<b>6</b>	<b>7</b>
<b>Stock 2019</b>	85,818	85,818
<b>Growth in CBC Base Trajectory</b>	5,877	5,877
<b>Growth in Horsham Trajectory</b>	16,739	16,615
<b>Stock 2037</b>	108,434	108,310
<b>Growth Rate</b>	1256	1,250
<b>Growth Rate pa CAGR</b>	1.3%	1.3%

- 6.57 On this basis, Iceni does not consider that there would necessarily be a market capacity constraint to the delivery of any of the options set out, as shown in Table 6.5, based on our assessment of the likely delivery timescales and build-out rate. This is however based on looking at the plan period as a whole. There are however potentially considerable constraints in respect of the ability to deliver supporting infrastructure to facilitate this pace of development which may limit the scale of growth which can be achieved over the plan period.
- 6.58 If we consider the potential phasing of growth, it is clear that the higher scenarios (Options 3c, 5, 6 and 7) would potentially imply housing delivery of around 1,200 homes a year to be sustained over a period of around 8 years between 2025-33 in this sub-market alone. This looks potentially quite challenging. This is a third higher than that achieved in recent years in the North Horsham Sub-Market. However this is in a period in which housing delivery in Crawley Borough, based on its existing trajectory, is expected to fall from c. 500-600 homes pa to relatively modest levels of housing delivery. There is also some potential for the trajectory as shown in Figure 6.9 to be re-profiled to see higher delivery rates in the period post 2033.

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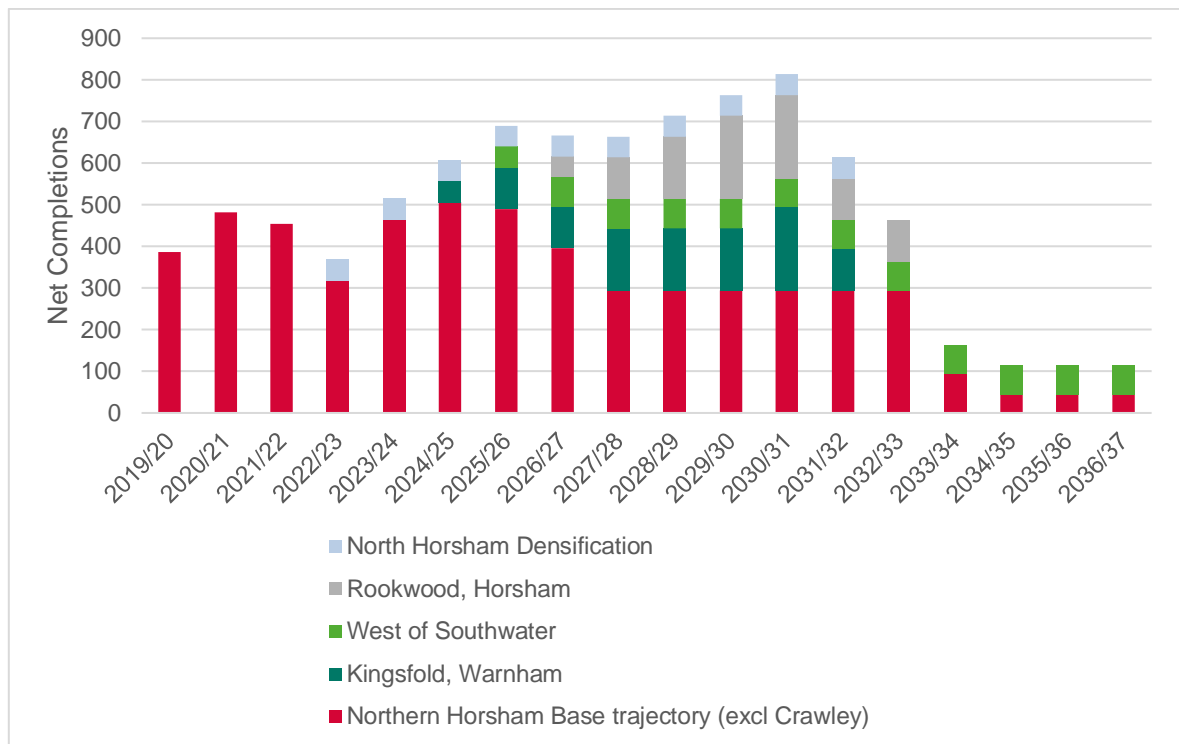
<sup>11</sup> Based on Crawley's adopted Local Plan, and trajectory data as at Dec 2019 provided by Crawley BC

**Figure 6.9: Housing Trajectory Scenarios for North Horsham Sub-Market**



- 6.59 If we take for instance Option 7, this sees a range of sites brought forwards both adjoining Crawley and close to Horsham.
- 6.60 The trajectory for growth around Horsham in this scenario is shown below. It suggests that if the sites are considered individually, quite significant delivery rates are shown between 2025-31 in and around Horsham in particular at around 700 homes pa. This sees growth at strategic sites north of Horsham, at Kingsfold and at Rockwood in relatively close proximity and could result in some localised market capacity issues. However there might be potential to reprofile growth in this option through seeing one of the strategic site options brought later in the plan period.

**Figure 6.10: Indicative Trajectory for Growth around Horsham in Option 7**



- 6.61 Considering the trajectory in Option 7 around Crawley, the further growth on the western side of Crawley in this option would principally come forwards as the existing housing trajectory starts to drop off. Icení would advise that further consideration is given to site allocations to be made in Crawley's Local Plan (including the scale and phasing of delivery), but the current evidence points to relatively modest levels of development coming forwards beyond 2029.

**Figure 6.11: Indicative Trajectory for Growth around Crawley in Option 7**



- 6.62 Iceni would consider that there are some potential risks of lower short-term delivery in/around Crawley in particular arising from the Coronavirus which could result in some re-profiling of the trajectories in the short-to-medium-term from that shown above.
- 6.63 With the two main towns in this area – Crawley and Horsham – and growth spread across them, these higher scenarios could thus potentially be achievable; but there are notable risks to the ability to sustain the higher growth scenarios over the plan period as a whole which is likely to include periods of stronger and weaker housing market conditions. The scale of growth implied in this Scenario in Options 6 and 7 – which implies sustaining delivery of c. 1250 dpa in this area alone - would also likely generate significant pressures for new infrastructure investment which could moderate the pace at which new development could come forward within this sub-market. Iceni thus conclude that Options 6 and 7 for this sub-market are potentially overly ambitious.
- 6.64 As the analysis above indicates, careful consideration should be given in this sub-market to the potential trajectory and phasing of growth around the two main towns.
- 6.65 The extent of development on land adjoining or close to the main existing settlements, which benefit from existing services, employment opportunities and infrastructure; could create competition and influence the pace at which new development could come forwards at a standalone new settlement location such as Buck Barn, West Grinstead within this sub-market. If a new settlement at this

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location is therefore selected as a preferred development option, careful consideration of the timing and delivery of infrastructure; provision of local employment development, and provision of a range of different housing products would be needed to support delivery at pace.

- 6.66 Overall, to sustain the higher rates of housing delivery in this sub-market will careful coordination in respect of issues around infrastructure delivery; and for the major strategic schemes to cater for a range of different market segments (e.g. build-to-rent, specialist older persons accommodation, self- and custom-build etc.).

### **South Sub-Market**

- 6.67 We have followed a consistent analytical approach to considering dynamics in the South of the District.
- 6.68 We have used Icení's assumptions regarding the delivery timescales for strategic sites as set out in Section 5. On this basis the 9 options set out see a level of development in this sub-area of between 2,100 dwellings (Option 1) and 4,900 dwellings (Option 4). Our analysis assumes that c. 52% of small site development takes place in this sub-market based on analysis undertaken by Icení of the historical distribution of small site development between the sub-areas.
- 6.69 The table below appraises the growth envisaged in each scenario. Option 1 (Low Growth Settlement Hierarchy) sees the lowest growth in this area at 0.7% per annum over the 2019-36 period. Options 3b, 3c, 5 and 6 also see relatively modest rates of housing growth at 0.8 - 1.0% pa.
- 6.70 Completions in this area over the 2011-19 period have averaged 163 dpa (with 167 dpa achieved over the last 5 years). This is however within a context whereby the Council's existing planning strategy focuses development in the North Horsham sub-market and should not therefore be necessarily seen as a cap on future development rates. Given the relative rurality of this area, sustaining delivery of over 200 dpa would be more challenging but would not necessarily be unreasonable particularly where supported strategic development sites are being built out.
- 6.71 Higher growth is shown in the South Sub-Market in Option 4 (influenced by the inclusion of the north east of Henfield, or Mayfield, new settlement) and Option 7 (which sees significant small site growth). This implies delivery of nearer 300 dpa in the South Sub-Market which is probably towards the limit of the scale of growth which could be accommodated within this area based on the current evidence. Achieving higher levels of growth than this are potentially restricted by the limited economic driver within this area.
- 6.72 If the Mayfield new settlement proposal is taken forwards, Icení would advise that further dialogue with the site promoter is progressed to consider the inter-relationship between the delivery model,

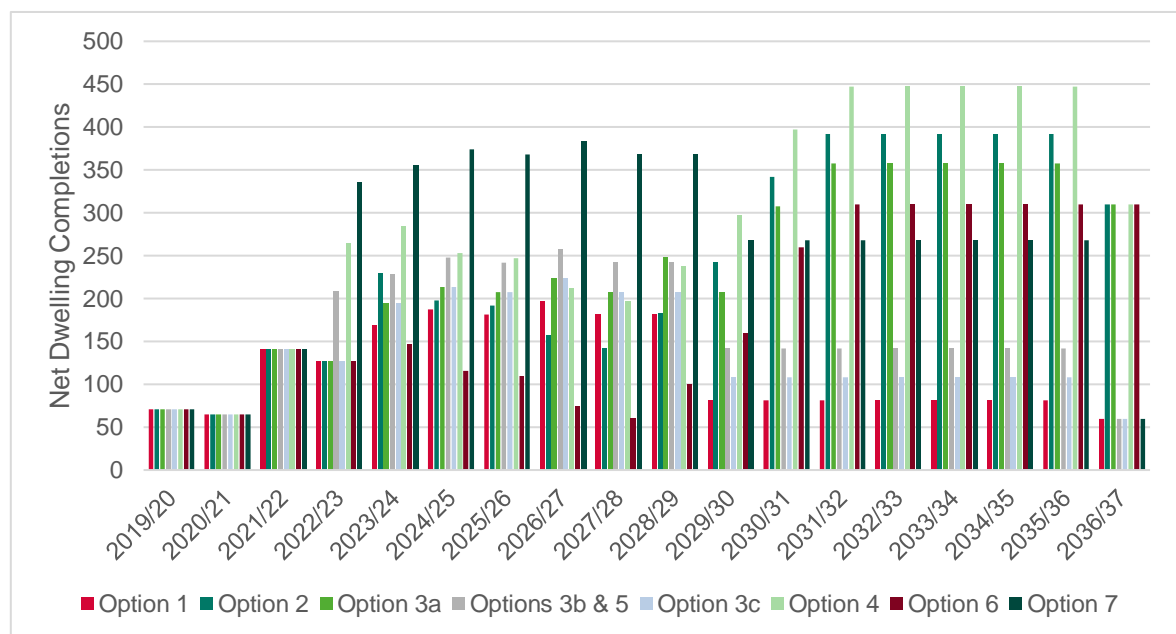
housing trajectory and issues such as transport connections and the employment/ economic strategy for the site. This should inform consideration of build-out rate assumptions.

**Table 6.7 Appraisal of Growth Scenarios – South of the District**

	<b>Growth 2019-37</b>	<b>dpa</b>	<b>CAGR 2019-37</b>
<b>Option 1</b>	2,129	118	0.7%
<b>Option 2</b>	4,355	242	1.4%
<b>Option 3a</b>	4,313	240	1.4%
<b>Options 3b &amp; 5</b>	2,993	166	1.0%
<b>Option 3c</b>	2,473	137	0.8%
<b>Option 4</b>	5,213	290	1.6%
<b>Option 6</b>	3,289	183	1.1%
<b>Option 7</b>	4,761	264	1.5%

- 6.73 The implied housing trajectory for this area in the various scenarios is shown in the chart below. Higher growth rates are envisaged in Options 3a, 4 and 7; with the higher growth rates in particular in those options in which it is assumed that a new settlement is delivered north-east of Henfield alongside significant small site development in this area.

**Figure 6.12: Housing Trajectory for South Sub-Market**



- 6.74 A cross-boundary consideration is the relative proximity of new settlement proposals north-east of Henfield (Mayfield) to Burgess Hill where strategic development is coming forwards, in particular within the Northern Arc.

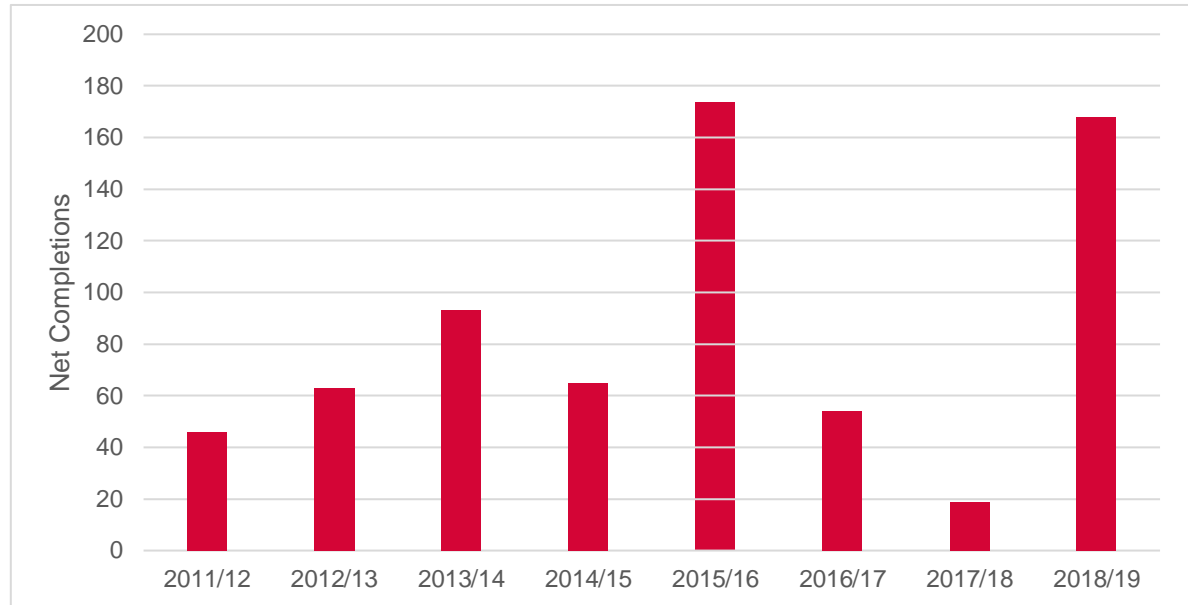
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- 6.75 There are c. 5,000 homes which are expected to be delivered at Burgess Hill over the next 15 years, based on Mid Sussex District Council's December 2019 Housing Trajectory together with a further 1,000 homes at Hassocks. Land north-east of Henfield (Mayfield) in particular is in relatively close proximity to these settlements. Burgess Hill has a concentration of employment, with further growth envisaged as part of the northern extension.
- 6.76 Iceni's analysis shows that this scale of growth at Burgess Hill and Hassocks (within Mid Sussex District) and the delivery timeframes associated with it, would result in stock growth of 2.7% pa over the next five years (2019-24), reducing to 2.1% over the subsequent 5 years to 2029 (2.1% pa) with then much weaker growth currently planned post 2028. A high pace of growth is therefore expected at Burgess Hill over the period to 2029. This is a consideration which could affect the delivery rate from a new settlement north-east of Henfield (if taken forwards) over the period to 2029 (and on one level suggests modest potential to introduce additional supply within the immediate vicinity in the short-to-medium-term). This supports Iceni's assumptions that the new settlement proposals north-east of Henfield, if brought forward, would be likely to deliver housing principally post 2029.
- 6.77 However there is a substantial unmet need and constrained housing delivery in the coastal settlements to the South which may influence the pace of development in this area, in particular in locations which are accessible from the coastal towns. From a market capacity perspective this would support the potential for development to come forwards at locations such as Ashington, Steyning and Storrington which sit within a different sub-market to growth in the north of the District, are accessible from the constrained coastal towns. This will however need to be balanced against the infrastructure capacity issues, transport and environmental constraints through the plan-making process.

#### **West Sub-Market**

- 6.78 Moving next to consider the West Sub-Market using a consistent approach, the Council's scenarios envisage development rates of (on average) between 120 - 290 dpa within this area over the plan period as a whole. As a number of the scenarios envisage a level of strategic growth in what it defined as a relatively small area, it is reasonable to expect higher comparative growth rates than might be seen at a district level (the growth rates are partly influenced by the tight geography being considered).
- 6.79 Historical completions in this area have averaged 122 dpa over the 2011-19 period. The chart below shows how this has varied year-on-year.
- 6.80 Local estate agents which Iceni has engaged with describe how Billingshurst has attracted a range of buyers including those living and working locally; from other towns and villages in the District and from London influenced by the rail links. It attracts a range of buyers including significant numbers of couples and young families. One estate agent has described how the volume of new-build development, and the incentives and support provided with new-build housing (for instance through

the Help-to-Buy scheme), has been impacting on the values achievable for re-sales of properties that are 3-5 years' old (which do not benefit from such incentives).

**Figure 6.13: Historical Net Completions in Billingshurst**



- 6.81 The options imply a scale of growth in this area which could vary from 0.9% pa in Options 3a and 3c, with a rate of housing delivery in these options which is below the average sustained in recent years; through to 2.1% growth sustaining annual housing delivery of on average c. 210 dpa in Option 3b in which growth comes forward both East of Billingshurst and at Adversane; and 2.4% pa in Option 6 in which growth comes forward both East and West of Billingshurst and at Adversane. Option 6 implies sustaining a growth rate which does not look to be achievable.

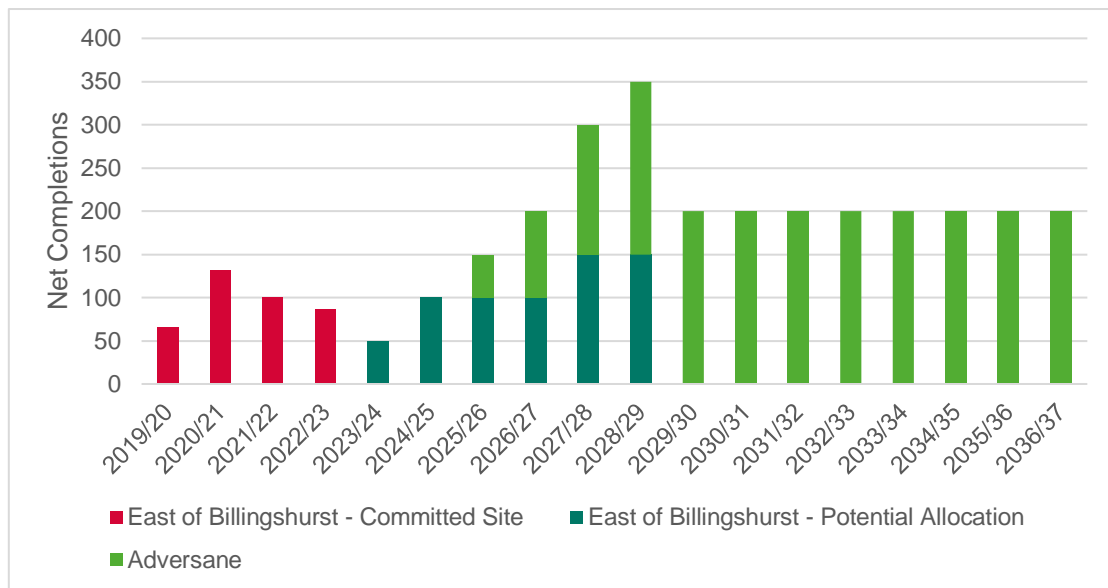
**Table 6.8 Appraisal of Growth Scenarios – West of the District**

	Growth 2019-37	dpa	CAGR 2019-37
<b>Option 1</b>	2,730	152	1.6%
<b>Option 2</b>	3,080	171	1.7%
<b>Option 3a/c</b>	1,545	86	0.9%
<b>Option 3b</b>	3,745	208	2.1%
<b>Option 4</b>	3,245	180	1.8%
<b>Option 5</b>	2,645	147	1.5%
<b>Option 6</b>	4,525	251	2.4%
<b>Option 7</b>	2,985	166	1.7%

- 6.82 Given the limited employment driver in this area, we consider that the options which see growth brought forward both through urban extensions to Billingshurst and a new settlement at Adversane could result in a relatively high degree of competition within a relatively localised market if the sites were being delivered concurrently.

- 6.83 The question which therefore arises is particularly one of timescales. It may be possible for some growth to be delivered earlier in the plan period at one location, such as part of the East of Billingshurst growth option; with a new settlement then coming forwards in the middle and latter part of the plan period. However the inter-relationship between the scale and timing of delivery at these locations would require detailed consideration if these are both to be taken forwards. The overlay of the two in Option 6 based on the initial delivery timeframes (as shown in the graph below) would show an unrealistic level of development between 2027-29 within this local market at over 200 dpa.

**Figure 6.14: Indicative Trajectory for Strategic Sites at/ near Billingshurst in Option 6**



- 6.84 The same principles would apply with growth both East and West of Billingshurst; or West of Billingshurst and Adversane.
- 6.85 A more realistic assumption would be for delivery of c. 1,800 homes at Adversane together with the East of Billingshurst scheme; with lower delivery at Adversane prior to 2029/30.
- 6.86 The analysis suggests that the scale and phasing of growth in the Billingshurst area will require careful consideration as plan preparation progresses. There is potential for delivery of multiple strategic sites within this sub-market, but as Figure 6.14 suggests, the potential for these to be delivering substantial numbers concurrently is limited (and the evidence suggests competition between them would reduce the build-out rate). It is however reasonable to see growth at one location within the early/middle part of the plan period, with another driving growth in the 2030s.

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## 7. DRAWING THE EVIDENCE TOGETHER

- 7.1 Horsham District Council does have a track record in planning for and delivering strategic growth through urban extensions to its main settlements such as Horsham, Broadbridge Heath, Southwater and extensions to Crawley.
- 7.2 For the Local Plan Review it will be important that the Council has demonstrated to a planning inspector (when its local plan is examined) that its housing trajectory can be delivered. With major strategic sites, it will need to be able to show that the consideration of what infrastructure is required and how this can be delivered is well advanced, that the costs of infrastructure have been identified and it is demonstrated that the scheme is viable (either through developer funding or where public funding is required that funding sources are identified). It will need to show that both the lead-in time and assumptions on delivery rates are reasonable. The ongoing engagement with site promoters will help to support this.

### **Appraising the Growth Options**

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- 7.3 Through the report, Iceni has sought to appraise what level of housing provision might be taken forward through the Local Plan Review. The report focuses on market capacity issues. We have appraised each of the growth options set out in the draft Local Plan consultation in Spring 2020.
- 7.4 The low growth scenario of 1,000 homes pa proposed by the Council would equate to 1.4% pa housing stock growth over the plan period to 2037 and represents a level of housing delivery which has been achieved, and indeed exceeded, in recent years. The evidence suggests that this would be achievable, with peak years of housing delivery not really exceeding levels which have been achieved in the District in the recent past. The housing delivery rates implied over 5 year periods of up to 1.7% pa again appear realistic against recent delivery. This scenario would however make no substantive contribution to meeting the significant scale of unmet need which arises from surrounding authorities. It is important that the Council therefore tests whether higher housing delivery could be supported, in terms of both market capacity and the ability to deliver supporting infrastructure (and potential impact of this on delivery timings), as part of the plan-making process.
- 7.5 The medium growth scenario of 1,200 homes pa would see development rates over the plan period equivalent to 1.6% per annum stock growth in Horsham District. This is towards the higher end of the spectrum relative to other comparator areas. It is below housing delivery rates achieved in Horsham District over the 2014-19 period at 1.8% pa albeit that this period does not cover a full economic cycle. It is a level which we consider could be supported given the characteristics of the District's housing market, in that this is a relatively high value market; it is surrounded by a number of more constrained areas where the wider sub-region; and there is a relatively strong economic

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growth potential at a district and sub-regional level. It would need to be planned for in a comprehensive way through the Local Plan Review process and see growth at a range of locations across the District.

- 7.6 The higher growth scenario for delivery of 1,400 homes pa would imply a need to sustain an average housing delivery rate of 1.9% pa over an 18 year period. These levels of delivery are at the top end of the range of what other districts within the wider South East have achieved historically over shorter timescales; but we find no substantive evidence that this level of housing delivery could be supported over a full 17 year plan period over a full housing market and economic cycle. The evidence thus suggests that this scenario is likely to overly-ambitious and there would be clear delivery risks associated with achieving it. Prior to the onset of the Covid-19 pandemic, Iceni considered that provision of an average of 1,200 – 1,300 homes per annum would have been the maximum achievable from a market capacity perspective. This would have represented a rate of housing delivery of 1.6 – 1.8% per annum.
- 7.7 The Covid-19 pandemic is expected to affect housing delivery in the short-term both through directly affecting construction and through effects on the economy and housing market confidence more widely. Taking this into account, based on the current information Iceni consider that housing delivery of between 1,150 – 1,250 dpa on average is likely to be achievable from a market capacity perspective over the plan period to 2037, equivalent to a growth rate in housing stock of 1.6 – 1.7% per annum. Recognising that at the time of writing we are still in the early stages of the pandemic, the Council may consider reviewing this further prior to the submission of the Plan when there is greater understanding of the economic and housing market impacts.
- 7.8 These conclusions are based on considering issues of market capacity. As the Council draws together a range of evidence through the Local Plan Review, it may find that issues associated with the infrastructure capacity – including in terms of strategic transport and utilities infrastructure. Infrastructure capacity and the lead-in time to deliver infrastructure improvements may influence the scale of growth which can be sustainably accommodated or moderate the pace at which development can be achieved, which in turn influence what housing requirement is ultimately deliverable over the plan period.

### **Housing Delivery from Strategic Sites over the Plan Period**

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- 7.9 Iceni's analysis has considered the strategic site options put forwards in the Sustainability Appraisal which was prepared alongside Regulation 18 draft Local Plan and assessed the potential lead-in time and build out-rate based on the information currently available. Based on this, there are a number of sites where Iceni considers the yield over the plan period to be lower than set out within the SA options and one option where it could be higher. These are shown in the table below. If these sites are taken forward, it is reasonable to expect the build-out of them to continue beyond 2037.

**Table 7.1 Assessment of potential supply from key sites over the plan period**

	Option	Iceni expected supply within plan period to 2037
West of Ifield	3000	2800
West of Southwater	1200	820
Adversane	2000	2,100
Land north-east of Henfield	2000 - 3000	1,850
Land at Buck Barn, West Grinstead	2000-3000	2,100

**The implications of this is that a number of the spatial options on our assessment deliver fewer homes over the plan period than the Council has originally anticipated. Iceni would recommend that the Council consider whether there are additional deliverable smaller, non-strategic sites in sustainable locations which could be included within the land supply to address this and ensure a sufficient supply-side buffer. Supply-side Flexibility**

- 7.10 A distinction needs to be drawn between the housing requirement and how much land would need to be allocated within the Local Plan Review. A level of land with capacity over the plan period for a higher level of housing delivery than the housing target would need to be made there is a need to ensure that there is some flexibility within the land supply to ensure that the Plan is deliverable over the plan period.
- 7.11 It is common therefore to see local plans which included a supply of land (as contained within a housing trajectory) which can be built out over the plan period which is 10% or more above the minimum housing requirement figure. This is necessary in order to provide a level of flexibility to ensure that the plan is able to accommodate slippage or slower delivery of some sites than originally anticipated without the planning policy framework being rendered out-of-date by virtue of a lack of five year housing land supply or under-performance against the Government's Housing Delivery Test. In addition some sites may continue to contribute to housing delivery beyond 2037.
- 7.12 In considering the appropriate contingency provision to make, the Council will need to take account of the nature of the spatial strategy taken forwards and risks to the delivery of key sites therein. Iceni considers that as a preferred strategy emerges, the Council undertakes some scenario testing to explore for instance the implications of a delay in delivery of key strategic sites and implications which this would have on the ability to meet the housing requirement over the plan period and maintain a 5 year housing land supply.

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### **Small sites supporting early delivery**

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- 7.13 The Council will need to be able to demonstrate that a five year housing land supply exists at the point of adoption (with a suitable buffer) and that it is able to maintain a rolling five year land supply over time.
- 7.14 The Council's existing base trajectory sees relatively strong housing delivery over the initial years of the plan period, but if a housing requirement of substantively above 1000 homes pa is set, there is the potential for this to result in a shortfall. The Council will need to be able to show that delivery can be increased rapidly to address this, and small sites of < 200 homes (including schemes of less than 70 homes which can be brought forward within a single phase) which do not require substantial infrastructure will be important in enabling it to do so. These issues will need to be balanced against wider sustainability considerations in determining the appropriate development strategy.
- 7.15 It is important however that this point is not over-emphasised. Those authorities which have delivered the highest housing growth rates historically have seen *both* delivery of small sites and major strategic growth coming forward. Major strategic growth locations are important in delivering higher overall numbers, and maintaining delivery through the economic cycle (in that the evidence shows that strategic sites where upfront infrastructure investment has occurred are more likely to sustain delivery rates during economic downturns).

### **A geographical spread of sites catering for different sub-markets**

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- 7.16 As this report has explored, the Council should be mindful of over-concentrating development in certain areas but in doing so should take account of the pace of development expected not just in parts of Horsham District, but in surrounding areas.
- 7.17 The northern part of the District includes Horsham, the District's main town, transport connections to Crawley, Gatwick and London and a concentration of existing economic activity and services. It is reasonable to therefore expect this area could sustain growth rates above the District average. Icen's analysis indicates that most of the growth options for this area are realistic; however the scale of growth implied in Options 6 and 7 (as set out in the Sustainability Appraisal) which imply growth rates of 2.0% pa and sustaining delivery of 1,250 dpa or more over a number of years in this sub-market is likely to be overly ambitious and unrealistic.
- 7.18 In the west of the District around Billingshurst, the options imply a scale of growth in this area which could vary from 1.3% pa in Options 3a and 3c, with a rate of housing delivery in these options which is below the trend in recent years; through to 2.4% growth sustaining annual housing delivery of on average over 200 dpa in Option 3b in which growth come forward both East of Billingshurst and at Adversane and over 250 dpa in Option 6 which also sees growth West of Billingshurst. Given the limited employment driver in this area, we consider that the options which see growth brought forward

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both through urban extensions to Billingshurst and a new settlement at Adversane could result in a relatively high degree of competition within a relatively localised market if the sites were being delivered concurrently. It is however reasonable to see growth at one location within the early/middle part of the plan period, with another driving growth in the 2030s (depending clearly on the scale of development at the strategic locations taken forwards).

- 7.19 If growth both East of Billingshurst and at Adversane are both included within the Plan, Icení would expect the delivery of development East of Billingshurst to affect the build-out rate at Adversane , particularly over the period to around 2030, which would affect what scale of development at Adversane is delivered over the plan period as a whole.
- 7.20 In the South of the District, the level of planned growth is more modest in most scenarios, in particular relative to the existing housing stock/ population base. However this in part a reflection of the relative rurality of the area. We would see potential for strategic development in this area, in particular given the inter-relationship to the Coastal housing market area in which there is a substantial unmet need.
- 7.21 Completions in this area over the 2011-19 period have averaged 163 dpa (with 167 dpa achieved over the last 5 years). This is however within a context whereby the Council's existing planning strategy focuses development in the North Horsham sub-market and should not therefore be necessarily seen as a cap on future development rates. Given the relative rurality of this area, sustaining delivery of over 200 dpa would be more challenging but would not necessarily be unreasonable particularly where supported strategic development sites are being built out.
- 7.22 If proposals for a new settlement North East of Henfield (Mayfield) is taken forward, it may be beneficial for some further consideration to be given to the differentiation of the offer at this site to that at North Burgess Hill; and to how the housing and transport strategies for the site together with infrastructure delivery work to support the pace of housing delivery. We do not consider it likely that significant growth at this location could happen in the first half of the plan period.

### **Supporting Higher Housing Delivery Rates**

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- 7.23 The Council is considering delivery of a higher scale of growth than it has historically, with the potential need for planning for a number of strategic growth locations, including dealing with planning applications for these, to take place concurrently. Consideration needs to be given to the resourcing of this, including whether additional resources are required to deal with major strategic sites.
- 7.24 In Icení's experience, there are a number of key considerations in ensuring that the plan is sound and housing delivery can be maintained which we explore below.

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## Product differentiation

- 7.25 Sir Oliver Letwin's *Independent Review of Build Out* has explained and reported on ways in which the build-out rate on large sites can be improved. The report found that:

*"if either the major house builders themselves, or others, were to offer much more housing of varying types, designs and tenures including a high proportion of affordable housing, and if more distinctive settings, landscapes and streetscapes were provided on the large sites, and if the resulting variety matched appropriately the differing desires and financial capacities of the people wanting to live in each particular area of high housing demand, then the overall absorption rates – and hence the overall build out rates – could be substantially accelerated."*

- 7.26 A key conclusion drawn from the *Review* is a need to increase diversity in the products delivered on large sites, and diversity in those who are building homes. Housing diversity is described as housing of differing type, size, style, design, and tenure mix; and includes housing sold/let to specific groups such as older persons housing, students, and self/ custom-built homes. Letwin recommended that each phase of the development should be subject to housing diversity requirements – including different housing products, types, tenures and styles.

- 7.27 Horsham is an area of relatively strong housing demand which will support the build-out rate. There are a number of areas surrounding it where housing delivery is constrained. These factors will support faster build-out than might be expected 'on average' across the country or indeed the region. Iceni's view is that the principle set out in the Letwin Review of diversity in the overall scheme, and where appropriate by phase, is right and will help to support build-out rates. Product diversity requirements could be set out in policies relating to strategic development sites within the Local Plan Review.

- 7.28 As part of the detailed planning process for strategic sites, the following issues should be considered:

- Sales outlets – the potential to support multiple sales outlets at different locations within the development scheme, as part of each phase. The potential for different start points should be considered.
- Product differentiation – ensuring that these sales outlets are able to offer a level of differentiation between the market housing 'product' being offered in order to limit competition and boost sales rates. The involvement of different housebuilders/ delivery agents should help to support this.

Integrated affordable housing – integrating affordable housing within development phases, as this is catering for a different market/ target group from the 'for sale' housing. Higher levels of affordable housing will be capable of supporting higher overall sales rates. The scale of affordable housing delivery which can be supported in the medium and longer-term, particularly on the larger strategic sites, will be influenced by other infrastructure requirements and how this

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is funded, together with Government funding support for affordable housing delivery (such as the £12.2 billion Affordable Homes programme).

- Catering for Different Market Segments – with elements of the larger strategic development schemes catering for different specialist market segments, such as build-to-rent; elderly persons accommodation; and self-custom-build development. There would be a benefit from designing schemes such that the potential of these markets can be tested within earlier phases, providing market evidence which then supports further investment in later phases of the scheme. There is evidence of a number of larger existing sites in the District which are delivering elderly persons accommodation; and both Kilnwood Vale and North Horsham will deliver both this and build-to-rent development which will help to demonstrate that a market locally exists for this. These principles should be integrated into policy requirements for other strategic sites.

- 7.29 Icenl consider that these issues need to inform and be embedded within the planning policy framework for the developments through the Local Plan Review; and there need to be clear planning policies/key principles addressing product diversity within the larger strategic sites within are applicable not just to an outline planning application; but which inform and guide delivery thereafter.

#### **The Planning Process**

- 7.30 There are extensive examples of strategic development schemes which have a lead-in time of 10 or more years before initial housing completions are achieved. It is in the Council's interest to ensure that strategic sites can be brought forward quickly (whilst not compromising on the achievement of quality). This requires collaboration between the Council and site promoters, and the investment of resources (on both sides), as well as other infrastructure providers and regulatory bodies.
- 7.31 The Council has put in place planning performance agreements with key site promoters and envisages that in most instances it can deal with schemes through outline planning applications. It is engaging with the County Council on highways and education matters; and has been liaising with Crawley BC on issues related to growth proposals adjoining Crawley. The Council has a track record of successfully bringing forward large strategic sites.
- 7.32 However the Council is potentially looking at bringing forward a number of strategic development schemes, and it will need to consider carefully how it puts in place the resources to enable it to potentially progress multiple schemes over similar timescales. It will also need to work carefully with organisations external to the Council such as West Sussex County Council, the Environment Agency, Highways England and Natural England to ensure timely input to planning applications, to the resolution of S106 Agreements and to discharging planning conditions.
- 7.33 It will be sensible for the Council to carefully consider what pre-commencement conditions will be necessary to attach to outline planning permissions, limiting it to those which are required; and to

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ensure that on its side the process of discharging conditions is adequately resourced to support the timely delivery of these major sites.

- 7.34 The Council can also help to reduce lead-in times and speed up delivery through a proactive role in bringing together developers with infrastructure providers (WSSC, utilities providers etc) and working proactively to address blockages/disputes as appropriate.

#### **Early Delivery of Key Infrastructure**

- 7.35 Infrastructure delivery will also support the build-out rate. Fundamentally people want to live in a place, rather than a building site and thus early delivery of supporting services and facilities including any local centre, schools and other social infrastructure can help to improve sales rates.
- 7.36 Early investment in key infrastructure, and placemaking more generally, which helps to make the sites more attractive places to live; and to give people a clearer impression of the place, will help to increase market sales rates and thus the build-out of the scheme.
- 7.37 There is a potential role for public funding in helping to support early delivery of infrastructure which can have benefits both in terms of increasing sales volumes, and supporting market values (and thus the viability of the schemes). There are funding opportunities available to support strategic growth and the delivery of strategic infrastructure which helps to unlock housing growth, much of which is targeted at higher value housing markets with particular affordability pressures which would include Horsham District. This includes the Government's Home Building Fund, its Housing Infrastructure Fund and through funding for Garden Communities.
- 7.38 The Council will need to examine as part of the plan-making process the inter-relationships between infrastructure provision, the delivery of strategic development schemes and viability. It will need to engage proactively with site promoters, infrastructure providers and adjoining authorities as appropriate in doing so. Iceni envisage that there will be some instances where public funding can support the upfront provision of infrastructure, supporting viability and the build-out rate; which we would encourage the Council to explore as appropriate.
- 7.39 Successful large-scale residential developments need a mix of local amenities, shops, workplaces, schools, public spaces, recreational space and different types of housing. This helps to build the community and supports vibrant, economically successful places.
- 7.40 A report by Savills on *the Value of Placemaking*<sup>12</sup> has shown that upfront "placemaking investment" – including through bringing forward the delivery of social and community infrastructure – makes the

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<sup>12</sup> <https://pdf.euro.savills.co.uk/uk/residential---other/spotlight-the-value-of-placemaking-2016.pdf>

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development more appealing and has a positive effect on both the pace of sales/ delivery and residential values (and thus ultimately the residual land value). In the theoretical example given, an increased infrastructure investment upfront of £15,000 per unit supports a 50% increase in sales rates and 20% increase in sales values. This relationship is particularly applicable to high demand areas where buyers can be drawn from strong markets nearby, and we would consider that there is particular potential for this in Horsham District. The report however demonstrates that to support this upfront investment requires 'patient capital' whereby essentially land is paid for over time rather than upfront creating more financial capital to invest in place.

- 7.41 The delivery of infrastructure within early phases of development can also help to create place and underpin demand. Savills research shows that investment in schools is particularly important as they can provide an immediate draw to the development attracting potential buyers, but also help to create footfall. Retail shops, services and local community facilities also need to be delivered hand-in-hand with the development of the strategic sites.
- 7.42 For some schemes (and particularly those in the south and west of the District), the phasing of employment development will also be important - as this can help to support housing need directly, as people look to move to the area to work; but will also help to support the growth of local services, which then in turn supports the vibrancy of the place and its attractiveness as a place to live. The potential for funding support for infrastructure investment to support economic growth should be explored through liaison with the Coast to Capital LEP.
- 7.43 The Council (and indeed the County Council) might wish to consider how it leverages its own resources to contribute to early infrastructure delivery to support the creation success of strategic development schemes. It seems likely that to take forward the larger of the new settlement proposals, some public funding may be needed to support early delivery of infrastructure and the wider scheme viability. There may be instances where there is a case for public sector organisations such as one of the local councils or government organisations invest in a strategic development scheme where its involvement can help to influence or de-risk delivery.
- 7.44 It will be important that the Council works to ensure that there is clarity on how strategic infrastructure will be delivered and funded as far as possible prior to the examination of the Local Plan, and these issues will influence the deliverability of the Plan's strategy.

#### **Modern Methods of Construction**

- 7.45 Modern methods of construction (MMC) relates to homes built using a high proportion of components which are produced using modern and technologically driven methods of manufacture, with this production often taking place offsite and the components then assembled onsite. This can support delivery of homes both within urban areas, urban extensions and new settlements with MMC for

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instance being an element of the delivery strategy at Northstowe in Cambridgeshire with certain phases being delivered in this way.

- 7.46 The Government's 2017 Housing White Paper<sup>13</sup> found that homes constructed offsite through 'modern methods of construction' can be built up to 30% quicker than by traditional methods of construction, and with potentially a 25% reduction in costs; and Government has sought to encourage growth in their use. Through using a high proportion of precision-manufactured components, materials and manufacturing systems, housing delivered in this way can be of a superior quality to that delivered through traditional construction, and can achieve better energy performance; can reduce the effects of site deliveries, noise and pollution by shortening the construction period and thus reducing disruption to local communities; and can require lower levels of workers, helping to mitigate and manage the potential effects of construction skills shortages.
- 7.47 In the UK, there are a range of bodies which have recently set up factories to deliver modular construction. This includes Berkeley Homes, which has built a 160,000 sq.ft factory in Kent which is expected to become operational in 2020 and has the capability to deliver 1,000 homes a year.<sup>14</sup> Legal and General, which owns housebuilders such as CALA, has a modular division<sup>15</sup> and has opened a factory near Leeds which is capable of producing 3,000 homes a year. A key issue for these companies is maintaining a pipeline of work as volume of delivery is an important component of the efficiencies which can be achieved by the model. The integration of MMC within new strategic development may be one additional means of supporting build-out rates; albeit that it influences the pace at which homes can be built as opposed to how fast they sell.

### **Supporting the Market in the Short-Term**

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- 7.48 In the short-term it is clear that the Coronavirus and associated economic implications of this can be expected to influence housing delivery. The Council should give specific thought to what it can do to maintain delivery.
- 7.49 There is potential for the bulk sale of housing to housing associations on sites which are already under construction reflecting the reduction in private sector market demand, as happened in the last recession, and for this to support cashflow and housing delivery. This will be particularly relevant for large sites which are under construction where there has been upfront investment in infrastructure.

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<sup>13</sup> DCLG (Feb 2017) *Fixing our broken housing market*

<sup>14</sup> <https://www.berkeleygroup.co.uk/about-us/our-brands/berkeley-modular>

<sup>15</sup> <https://www.legalandgeneral.com/modular/>

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This (and the scale of impact) will however be influenced by the availability of funding and is thus more of an issue for national Government.

- 7.50 Clearly the Help-to-Buy Programme will be important to supporting the private sector market in the short-term. This is however more of an issue for national Government.
- 7.51 The Council might consider whether there are ways in which it can encourage construction to be continued in the short-term, such as through deferring S106 contributions where it would help to support cashflow. It might also consider whether there are means of supporting SME housebuilders including through both the provision of smaller sites which can be brought forward quickly, which will help to stimulate investment and recovery; and working with master developers on larger sites to enable smaller SME housebuilders' involvement.

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## **A1. STRATEGIC SITE PROFORMAS**



## Horsham District Strategic Site Proforma

Site Details	
Site Address	West of Ifield, Crawley
Number of Residential Units	3,250 homes

Promoter / Developer Details	
Name	Ken Glendinning
Organisation	Homes England
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Master developer

Site Ownership	
Who owns the land?	<p>Homes England currently owns c.66% of the site and has in place agreed Heads of Terms with the remaining landowners within the Site. In line with the commitment in our Strategic Plan (2018 – 2023) to deliver homes at Ifield within the next 5 years, Homes England has approval (subject to planning permission being granted and successful Local Plan allocation) to enter into a conditional contract with all other landowners / associated promoter interests.</p> <p>These arrangements mean that Homes England will wholly control all land required to deliver the 3,250 homes scheme and necessary supporting infrastructure.</p> <p>We will continue to explore options to achieve full control of the land as early as possible to provide the necessary certainty that the first homes can be delivered in 2022/2023.</p>
How many ownerships are there?	As above, there are currently multiple ownerships across the site – comprising six land owners (including Homes England), however it is expected that Homes England will have the necessary agreements in place to control all land required and for the development to commence in 2022/23.
Is a promotion agreement in place with all landowners?	Yes – Heads of Terms have been agreed with all landowners with conditional contracts subject to obtaining outline planning permission. It is expected that conditional contracts will be entered into during 2020 and this can be confirmed through our response to HDC Reg 18 consultation.

Development Status	
What progress has been made to date on site assessment work?	<p>The land to the west of Ifield is a 194 hectare strategic development opportunity, potentially part of a wider strategic allocation for up to 10,000 homes (see separate response).</p> <p>The site has a long history of being promoted and has previously been assessed through the current Horsham Local Plan. Promotion has always been considered as a continuation of the original vision for Crawley New Town and providing a new Neighbourhood Centre for Crawley. Aware of the wider development potential, Homes England also submitted a bid to join the Garden Communities programme in November 2018 which demonstrated the potential for an additional two neighbourhood centres to the south collectively forming a new Garden Community as part of the wider strategic allocation. For clarity this proforma is in relation to the 3,250 homes scheme only.</p>

	<p>The site has been assessed in the 2018 HDC SHELAA and is currently assessed as 'not currently developable' only on the basis that there are a number of potential constraints and that it would only be suitable for development if allocated as part of the current Horsham District Council (HDC) Local Plan Review. There are no constraints or designations that indicate that the site should be excluded from development.</p> <p>While the site was not taken forward in the last plan, it was acknowledged by the Inspector in Para 78 – 80 that the site is well located in a relatively sustainable position, that there were no insurmountable issues subject to further technical work being undertaken and that the site should be considered again as part of the HDC Local Plan review.</p> <p>Homes England has undertaken substantive technical feasibility and site assessment work to proactively address the issues identified previously and is now in a position to confirm that these are no constraints or barriers to bringing development forward on the site.</p> <p>The work undertaken to date to address potential constraints includes:</p> <ul style="list-style-type: none"> <li>• <b>Future Gatwick Airport Expansion</b> – Homes England are actively engaged with Gatwick Airport Limited (GAL) in relation to potential impacts with potential constraints taken account of in the emerging masterplan. This includes avoiding any residential above the 60dB contour and identifying necessary design led / other mitigation within the 57dB areas associated with a future second southern runway. Notwithstanding this, there is currently no Government policy supporting a new southern runway (with a third runway at Heathrow preferred) and GAL have confirmed their intention to progress a DCO later in 2020 in relation to the use of its existing standby runway north of the site. Crawley Borough Council have also indicated their intention to remove the safeguarding area and any restrictions on developing within the proposed development site on the basis of noise impacts aren't likely to materialise. GAL have also confirmed that the emerging masterplan will not impact on operational requirements (e.g. radar) and regular dialogue will continue to ensure this remains the case.</li> <li>• <b>Cumulative traffic impacts and need for Crawley Western Relief Road (CWRR)</b> – Arcadis, (on behalf of Homes England) has undertaken high level strategic modelling of the wider area using the Crawley Town Model in order to assess a number of potential growth scenarios (including future Gatwick Expansion). While further testing will be undertaken as part of the HDC Local Plan review, the strategic modelling to date shows that i) there are a number of existing capacity issues within the Crawley area that need to be addressed notwithstanding any future development being identified through the HDC or CBC review ii) 3,250 homes west of Ifield in isolation does not require the full CWRR to be delivered and the 'middle section' acting as the main development access (with no through traffic) is sufficient to mitigate any potential traffic impacts iii) the cumulative impact of development in and around Horsham / Crawley through the Local Plan reviews (regardless of whether west of Ifield is included or not) will necessitate the need for the CWRR iv) the west of Ifield 3,250 scheme (potentially in combination with a wider strategic allocation west of Ifield (for up to 10,000 homes is well placed to successfully deliver the CWRR link). Preliminary design work of the CWRR undertaken by Arcadis shows that there are a number</li> </ul>
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	<p>of alignment options for the full CWRR (delivered in its entirety or phased) and this route can be safeguarded as part of the 3,250 scheme.</p> <ul style="list-style-type: none"> <li>• <b>Delivery of social infrastructure</b> – Homes England have engaged with service providers including West Sussex County Council (WSCC) and Clinical Commissioning Group (CCG) in relation to health and education provision. These discussions have considered facility requirements necessary to mitigate the impact of development from the 3,250 scheme as well as opportunities for the development to address extant requirements. This includes the provision of a minimum 8FE secondary education site that will help address an urgent need for additional school places in the mid 2020's. At this stage two primary schools, a secondary school and associated new community centres, including health, leisure, recreation and community uses as well as significant open space are allowed for in the emerging masterplan and Homes England are committed to ensuring that they are delivered as early as possible within the development.</li> <li>• <b>WwTW Capacity</b> – Arcadis on behalf of Homes England are actively engaged with Thames Water Developer Services over Waste Water capacity within the Crawley area and the development is currently being modelled as part of Thames Water's capacity review within the Crawley catchment. While the review is still to be completed, Thames Water have confirmed that technical solutions exist to provide adequate capacity.</li> <li>• <b>Availability of Ifield Golf Course</b> – as set out above, Homes England are actively engaged with the Golf Course and the necessary agreements will be in place during early 2020 that will allow the first new homes to be delivered in 2022/23.</li> <li>• <b>Flood Risk</b> – Homes England has been working in partnership with the Environment Agency to assess flood risk issues within the site and to identify solutions that reduce overall floodrisk within the site as well as for existing at-risk properties along the River Mole. A comprehensive flood risk and surface water drainage strategy has been developed that meets these objectives and further work will be undertaken during 2020 through further pre-application discussions to finalise this.</li> <li>• <b>Landscape impact</b> – detailed Landscape Impact Character Assessments have been undertaken to identify opportunities and constraints within the site. This assessment has been shared with HDC and Crawley Borough Council (CBC) as part of the pre-application discussions and is informing the development of the masterplan.</li> </ul> <p>A detailed response was submitted to HDC in June 2019, setting out the benefits of the scheme and how the issues previously identified by the Inspector can be assessed. Homes England has also submitted representations to Crawley Local Plan Regulation 18 consultation. While the site is located within Horsham, Homes England is also promoting the site and the delivery of critical infrastructure through the Crawley Local Plan in light of the key interdependencies.</p> <p>Further technical assessment relating to the economic, social and environmental benefits of the scheme is currently underway and a detailed</p>
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	response outlining this will be provided in response to HDC's Reg 18 consultation early in 2020.
Has a masterplan been prepared, or is this underway?	<p>Yes – a masterplan is being prepared taking account of the assessments and technical feasibility work outlined above. While a number of key concepts within the masterplan are now well established – these are currently being tested through a comprehensive package of pre-application advice with key stakeholders and public consultation that commenced in January 2020.</p> <p>The illustrative masterplan will be completed by Summer of 2020 and submitted as part of an outline planning application (OPA) in Autumn 2020 to support a future allocation and to demonstrate that the site is deliverable.</p>
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	<p>The development of the masterplan is being supported by the preparation of a comprehensive Infrastructure Delivery Plan and HM Treasury Green Book Business Case to provide certainty around the scale and timing of infrastructure delivery associated with the scheme.</p> <p>As Master Developer, Homes England is in a position to take a proactive role in delivering major infrastructure within the site and has a track record of delivering multi-million pound infrastructure packages on large strategic sites – including Northstowe and Burgess Hill. Where necessary Homes England is already engaged with the necessary infrastructure delivery partners to ensure that important infrastructure can be delivered early within the development to help establish the new communities as soon as possible and to ensure that the proposed scheme also benefits the existing community.</p>

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	To help support a strategic allocation and demonstrate deliverability the OPA for the 3,250 homes scheme will be submitted in Autumn 2020 with a view to it being determined as soon as possible following adoption of the HDC Local Plan.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	<p>Homes England will act as a 'master developer' taking an active role in the overall delivery of the site and critical infrastructure. Homes England will continue to work with HDC, CBC and other local stakeholders throughout the delivery stage to ensure high quality design is delivered consistently across the site and that the key objectives of the masterplan are met.</p> <p>Where required Homes England will work with partners to bring forward the delivery of other infrastructure in order to provide serviced plots for housebuilders to deliver the new homes.</p> <p>In line with Homes England's strategic objectives to accelerate housing delivery, Homes England will work with a number of delivery partners in order to maximise the number of outlets within the site.</p> <p>This model is already delivering new homes on similar scale developments at Northstowe, Burgess Hill and York Central.</p>
When do you anticipate construction on-site commencing?	2022 / 2023 with infrastructure being delivered upfront / in the early stages. The Homes England's Strategic Plan confirms the start of 200 homes West of Ifield by 2022/23.
When do you anticipate first completions?	2022 / 2023
How many developers are likely to be building on site concurrently?	Multiple housebuilders, housing associations, MMC companies and SME builders. In line with Homes England's strategic objectives to

	accelerate housing delivery, we will work with a number of delivery partners in order to maximise the number of outlets within the site.
How many sales points do you anticipate to have on site?	To be confirmed.
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	<p>Homes England will deliver in line with Horsham's affordable housing policy which in this case is 35% - including a policy compliant tenure mix to ensure local housing needs are met.</p> <p>Homes England will cater for different markets including but not limited to open market, Build to Rent, retirement, shared ownership and other housing markets. In line with its strategic objectives, Homes England will continually review local housing needs throughout the delivery of the scheme to ensure that they can be adequately met.</p>
What major infrastructure is associated with the development?	<p>The CWRR is a major piece of infrastructure that has been identified by CBC and WSCC. The purpose of the CWRR would be to alleviate traffic within Crawley Town Centre and thus contribute to a reduction in pollution levels in the area. It remains a strategic policy for future development and land use planning. The layout of the development site includes consideration and safeguarding of the land required to deliver the full relief road (dual carriage way) as well as providing an access into the site from Charlwood Road. The development is not considered dependent on the delivery of the 'full' future relief road, nor in the dual carriageway configuration, however the development proposals are considered to greatly assist in the delivery of the future CWRR.</p> <p>The potential future capacity requirements of the relief road have been taken into account within the design of the 3,250 scheme, enabling the central section of the CWRR to be expanded to dual carriage way if required. The development of the site and the CWRR are therefore mutually beneficial and can help achieve wider strategic objectives for the site.</p>
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	No.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	80
2023/24	170	2024/25	200	2025/26	200	2026/27	250	2027/28	250
2028/29	250	2029/30	250	2030/31	250	2031/32	300	2032/33	350
2033/34	350	2034/35	350	2035/36		2036/37		Beyond:	

Please note the delivery rates at this stage are indicative and will be confirmed through our responses to the HDC Local Plan Review as further technical work is completed.

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
<p>Homes England is an executive non-departmental public body, sponsored by the Ministry of Housing, Communities and Local Government (MHCLG). Homes England is the government's housing accelerator with the appetite, influence, expertise and resources to drive positive market change. By releasing more land to developers who want to make a difference, we're helping to improve neighbourhoods and grow communities.</p> <p>Homes England works in collaboration with partners who share our ambition. These include local authorities, private developers, housing associations, lenders and infrastructure providers. Within the next few years, Homes England will have invested over £27 billion across our programmes – and West of Ifield is included within this.</p>

Homes England has experience in acting as a 'master developer' on schemes such as the Northern Arc in Burgess Hill and Northstowe and is in the process of bringing forward other strategic sites across England. In the case of Burgess Hill, we acquired the site, which has been identified as a location for major housing delivery for over 10 years but had stalled due to the complexities of land ownership and the need for upfront strategic infrastructure delivery. Working closely with Mid Sussex District Council and other deliver partners, Homes England has secured outline consent and is expecting to start on site during 2020 – around 2 years after acquiring the site. Having already undertaken a significant amount of work in relation to West of Ifield and being in a position to submit an outline planning application later this year – achieving similar timescales is expected here.

At West of Ifield, we will take a similar approach as the master developer to accelerate the delivery of key infrastructure and enable an increased housing delivery rate. Furthermore, acting as a master developer will enable Homes England to maintain the highest design standards across the scheme from outset to completion as well as delivering significant social, economic and environmental benefits to the existing neighbourhoods of Crawley.

This proforma is relation for the 3,250 homes scheme which will be the first neighbourhood for West of Ifield. There is a longer-term ambition for the West of Ifield to form part of a larger Garden Town of some 10,000 homes. This would encompass the 3,250 homes scheme as well as additional land to the south and is expected to be delivered in partnership with the local authorities. There is a separate 10,000 homes proforma which we have submitted as part of the Housing Delivery Study.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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**<https://www.horsham.gov.uk/privacy-statement>.**



## Horsham District Strategic Site Proforma

Site Details	
Site Address	West of Ifield, Crawley
Number of Residential Units	10,000 homes

Promoter / Developer Details	
Name	Ken Glendinning
Organisation	Homes England
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Master Developer

Site Ownership	
Who owns the land?	<p>Homes England are the majority land owners for the proposed development area for 3,250 homes west of Ifield (see separate submission). This site is shown as SA101 in the 2018 HDC SHELAA. As set out in the separate response, Homes England can demonstrate control of the necessary land to bring forward 3,250 homes and associated infrastructure as a standalone new neighbourhood.</p> <p>While the 3,250 site is well located to make a significant contribution to the housing needs for Horsham as well as allowing it to discharge its responsibilities under its duty-to-cooperate, Homes England have identified a longer term strategic opportunity for the 3,250 scheme to form the first neighbourhood of a much larger opportunity to deliver a Garden Town with the potential for at least 10,000 homes, 10,000 jobs and associated infrastructure.</p> <p>Benefits of a larger scheme include:</p> <ul style="list-style-type: none"><li>- <b>Opportunity to meet long term housing needs sustainably</b> – providing certainty around how long-term housing needs for both Horsham and Crawley (in line with the duty-to-cooperate) can be met, integrating with existing communities alongside delivery of essential infrastructure as part of a long-term delivery strategy.</li><li>- <b>Opportunity to protect areas not suitable for development</b> – providing long-term defensible boundaries and protection against piecemeal development.</li><li>- <b>Support significant investment</b> – supporting the case for significant long-term investment in essential infrastructure, promoting the use of modern sustainable transport methods and safeguarding the opportunity to adapt to a low carbon future.</li></ul> <p>The extent of the wider development opportunity for 10,000 homes is undefined but is broadly covered by SA341, SA295 (in part) and adjacent areas. These areas are within few land ownerships and work is ongoing to identify potential delivery structures to make the land available and discussions have commenced between the key stakeholders and landowners in relation to the site.</p>
How many ownerships are there?	Unknown at this stage due to the extent of wider Garden Town opportunity being undefined.

Is a promotion agreement in place with all landowners?	Not at this stage but discussions are ongoing.
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Development Status	
What progress has been made to date on site assessment work?	Detailed work has been undertaken into the first phase (3,250) scheme. Desktop site investigations have been undertaken for the remaining of the wider opportunity and a programme of works has been identified for 2020 to inform a framework plan to better define the opportunity and support a long term allocation or strategic commitment through the Local Plan Review.
Has a masterplan been prepared, or is this underway?	Due to the scale of the development and expectation that the wider scheme will be delivered during the latter years of this plan period and therefore considered in more detail as part of future Local Plan reviews it would not be appropriate for detailed masterplans to be produced at this time. A framework plan to better define the opportunity and support a long-term allocation or strategic commitment will be developed through 2020.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	<p>To support the detailed masterplanning for the 3,250 scheme initial feasibility and preliminary design work has been undertaken for the full Crawley Western Relief Road (CWRR) that demonstrates there is a feasible and deliverable scheme that would meet the objectives of the CWRR.</p> <p>Homes England in its wider capacity as the Government's housing delivery agency, is exploring a number of options for Homes England to support the necessary infrastructure delivery alongside partners to ensure the site is deliverable, or to take a more direct role depending on what delivery structures are arrived at.</p>

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	<p>To help support a strategic allocation and demonstrate deliverability the OPA for the first neighbourhood (3,250 homes scheme) will be submitted in Autumn 2020 with a view to it being determined as soon as possible following adoption of the HDC Local Plan.</p> <p>Should HDC support a longer-term objective to deliver the larger development opportunity this application can be positioned within a wider development framework to ensure that the overall strategic objectives for a new Garden Town community are met.</p>
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	<p>Work is ongoing to identify potential delivery structures to make the land available and discussions have commenced between the key stakeholders and landowners in relation to the wider development site.</p> <p>Should Homes England take an active role in the site in its capacity as 'master developer' Homes England will work with partners to bring forward the site.</p> <p>This model is already delivering new homes on a similar scale development at Northstowe.</p>
When do you anticipate construction on-site commencing?	To be confirmed. It is expected that Phase 1 (3,250) scheme will be delivered early in the next plan period and the Homes England Strategic Plan confirms the start of 200 homes West of Ifield by 2022/23. The timing of delivery for the latter phases are expected to be confirmed through future Local Plan reviews.
When do you anticipate first completions?	2022 / 2023 – Phase 1. Phase 2 + Phase 3 – TBC

How many developers are likely to be building on site concurrently?	To be confirmed but multiple expected.
How many sales points do you anticipate to have on site?	To be confirmed but multiple expected.
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes. It is expected that the site will cater for different markets in line with strategic objectives to diversify markets and accelerate housing delivery.
What major infrastructure is associated with the development?	Full infrastructure requirements are still to be determined. The full delivery of the CWRR will be required and initial feasibility shows how this can be delivered.
Are there any potential “showstopping” infrastructure constraints which may affect delivery timescales?	It is not considered that there will be any ‘show stoppers’ following review of available evidence to date.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	80
2023/24	170	2024/25	200	2025/26	200	2026/27	250	2027/28	250
2028/29	250	2029/30	250	2030/31	250	2031/32	400*	2032/33	400*
2033/34	400*	2034/35	450*	2035/36	450*	2036/37	500*	Beyond:	5,900

Please note the delivery rates at this stage are indicative and will be confirmed through our responses to the HDC Local Plan Review as further technical work is completed. \*\*Increase in delivery rates reflects the opportunity with the larger allocation to deliver across additional outlets as part of the 10,000 scheme which will be assessed through future Local Plan reviews.

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
<p>Homes England is an executive non-departmental public body, sponsored by the Ministry of Housing, Communities and Local Government (MHCLG). Homes England is the government’s housing accelerator with the appetite, influence, expertise and resources to drive positive market change. By releasing more land to developers who want to make a difference, we’re helping to improve neighbourhoods and grow communities.</p> <p>Homes England works in collaboration with partners who share our ambition. These include local authorities, private developers, housing associations, lenders and infrastructure providers. Within the next few years, Homes England will have invested over £27 billion across our programmes – and West of Ifield is included within this.</p> <p>Homes England has experience in acting as a ‘master developer’ on schemes such as the Northern Arc in Burgess Hill and Northstowe and is in the process of bringing forward other strategic sites across England. In the case of Burgess Hill, we acquired the site, which has been identified as a location for major housing delivery for over 10 years but had stalled due to the complexities of land ownership and the need for upfront strategic infrastructure delivery. Working closely with Mid Sussex District Council and other deliver partners, Homes England has secured outline consent and is expecting to start on site during 2020 – around 2 years after acquiring the site. Having already undertaken a significant amount of work in relation to West of Ifield and being in a position to submit an outline planning application later this year – achieving similar timescales is expected here.</p> <p>At West of Ifield, we will take a similar approach as the master developer to accelerate the delivery of key infrastructure to enable housing to be built out quickly. Furthermore, acting as a master developer will enable Homes England to maintain the highest design standards across the scheme from outset to completion as well as delivering significant social, economic and environmental benefits to the existing neighbourhoods of Crawley.</p>



This proforma is relation for the 3,250 homes scheme which will be the first neighbourhood for West of Ifield. There is a longer-term ambition for the West of Ifield to form part of a larger Garden Town of some 10,000 homes. This would encompass the 3,250 homes scheme as well as additional land to the south and is expected to be delivered in partnership with the local authorities.

By identifying through this Local Plan review, the long term opportunity to deliver a large scale new community west of Ifield now, there is an opportunity to identify a strategic opportunity to meet long term housing needs for Horsham and Crawley. An early commitment to the long term delivery of a new community west of Ifield will enable positive planning that will ensure the optimum outcomes and benefits from the new neighbourhoods are realised.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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<https://www.horsham.gov.uk/privacy-statement>.



## Horsham District Strategic Site Proforma

Site Details	
Site Address	West of Kilnwood Vale Extension
Number of Residential Units	Circa 800 (Ph1 of c2,500)

Promoter / Developer Details	
Name	Tim Simon
Organisation	Crest Nicholson
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Promotor and developer

Site Ownership	
Who owns the land?	Mr Calvert
How many ownerships are there?	1
Is a promotion agreement in place with all landowners?	Yes, option agreement

Development Status	
What progress has been made to date on site assessment work?	Highways, ecology, landscape, planning, and masterplanning constraints and opportunities analysis (including capacity analysis).
Has a masterplan been prepared, or is this underway?	Illustrative master plan produced.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	Anticipate initial access via existing Kilnwood Vale development (circa 2,750 units). Further requirements for later phases, potentially including A264 junction (subject to further/detailed analysis).

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	Submission of planning application following Local Plan examination.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	Crest Nicholson will be principle developer and has the ability to bring partners onboard
When do you anticipate construction on-site commencing?	2022/2023 housebuilding start (subject to Local Plan timing).
When do you anticipate first completions?	C6 months after commencement of development
How many developers are likely to be building on site concurrently?	TBC
How many sales points do you anticipate to have on site?	Anticipate 1 initially, gearing up to 2.
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	TBC, but could include traditional market, BTR/PRS, retirement and affordable.
What major infrastructure is associated with the development?	<ul style="list-style-type: none"><li>• The proposed allocation can help facilitate the CWRR.</li><li>• Generous formal and informal open space.</li><li>• Potential for extended bus services to link into existing Kilnwood Vale development.</li><li>• Upgrades and improvements to pedestrian/cycle routes, potentially including bridged railway crossings and access to rail facilities.</li><li>• Bridle path upgrades and enhancements.</li><li>• Biodiversity/ecological enhancements.</li></ul>



	<ul style="list-style-type: none"><li>• Resident-led management company to foster long-term stewardship and civic pride (similar to existing Kilnwood Vale development).</li><li>• Details TBC.</li></ul>
Are there any potential “showstopping” infrastructure constraints which may affect delivery timescales?	No.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	
2023/24	80	2024/25	180	2025/26	180	2026/27	180	2027/28	180
2028/29		2029/30		2030/31		2031/32		2032/33	
2033/34		2034/35		2035/36		2036/37		Beyond:	

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?

Note that Crest have a proven track record at Kilnwood Vale and elsewhere of partnerships with other housebuilders, institutional PRS providers and RSLs in developing strategic sites by enabling multiple outlets to operate on sites at any one time to increase delivery.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.



## Horsham District Strategic Site Proforma

Site Details	
Site Address	Land at Kingsfold
Number of Residential Units	Minimum 800 up to 2,000

Promoter / Developer Details	
	Richard Cutler
	North West Horsham Estates Ltd
	Hayfield Homes and Bloombridge LLP
	Housebuilder and Commercial Developer

Site Ownership	
	The principal/controlling landowner is Mr Fisher c/o Andrew Mahon Properties Ltd
	Mr Fisher, plus four others
	Yes

Development Status	
What progress has been made to date on site assessment work?	<p>We have previously submitted the following technical studies to Horsham District Council:</p> <ol style="list-style-type: none"><li>1. Two Place-making Statements (Space Strategy, LDA Design &amp; DP9)</li><li>2. Economic Development Study (Ramidus)</li><li>3. Transportation (Vectos)</li><li>4. Rail Study (Jonathan Roberts Consulting)</li><li>5. Landscape &amp; Visual (LDA Design)</li><li>6. Ecology Phase 1 (Ecology Solutions)</li><li>7. Heritage (Cotswold Archaeology)</li><li>8. Title Search (Breachers)</li></ol>
Has a masterplan been prepared, or is this underway?	<p>A master plan was originally prepared in 2015 for 3,000 houses, including the possibility of further land to the north, but constraints analysis has ruled this out for this plan period.</p> <p>The current Master Plan, based on the Place-making Statement (Update) prepared by Space Strategy and LDA Design and presented to Horsham in July 2019 is broken down into 2 phases.</p> <p>Phase 1:</p> <ol style="list-style-type: none"><li>1. Minimum 800 houses on the west side of the railway line available for immediate</li></ol>

	<p>development (subject to planning permission).</p> <ol style="list-style-type: none"> <li>2. Delivery of an A24 Relief Road for Kingsfold, along with a range of accessibility and traffic calming measures (costed at £10m).</li> <li>3. A 'Mobility Hub', initially founded on public transport, e-vehicles, car club and cycling (see Vectos submission), but anticipated to expand to include the relocated Warnham station, which is anticipated to be viable for Network Rail given the new housing north of Horsham and the greater profile and accessibility offered by the A24 Relief Road (see JRC submission).</li> <li>4. Land reserved for a relocated Warnham Station and possible road crossing of the railway line. Improvements to the three existing crossings/underpasses.</li> <li>5. Improved access to a new 60 hectare community park on the east side of the railway line, rewilding arable land and creating a high quality green infrastructure network which protects and enhances existing habitat features ensuring site wide connectivity. This combination of measures will provide a major biodiversity gain and enhance the functional value of the site on a landscape scale.</li> </ol> <p>The enhanced accessibility may enable more housing in Phase 1, including at an increased density around the 'Mobility Hub'.</p> <p>Phase 2 comprises a minimum 500 houses and a 75,000 sq m business park extension to the Broadlands Campus – this campus is currently subject to a planning application for 11,000 sq m of B1 and this is intended to be occupied by 2,500 Schroder employees by Q4 2022. This is a very substantial inward investment for Horsham District, but meaningful and wider economic development multipliers can only be achieved by providing grow on and collaboration space. In other words, an extended business park. Our proposals currently provide for an additional 75,000 sq m of B1 floorspace and this is proposed to be delivered within the Plan Period and will contribute to the shortfall identified within the Northern West Sussex EGA Update (January 2020). This needs to be planned for, for example by means of a Key Employment Site designation. In addition, Schroder's plans will only be truly sustainable if a broad approach is taken, including in relation to public transport, cycle/pedestrian accessibility, the availability of amenities (retail, restaurants and health &amp; well-being)</p>
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	and putting houses next to jobs to make a sustainable, mixed-use business community. These benefits and linkages can be provided for in any planning permission issued to Schroder (anticipated in May 2020) and planned for and delivered as part of the emerging Horsham Local Plan. It would be a very major lost opportunity for the district if the emerging Plan did not set a strategy for maximising the synergies from the most significant inward investment in the district for 40 years.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	<p>The main infrastructure requirements are as follows:</p> <ol style="list-style-type: none"> <li>1. The Relief Road – this has been designed by Vectos and a dialogue opened with West Sussex County Council. The land is within control and the road will be funded by the 800 houses in Phase 1.</li> <li>2. Relocated Warnham Station – feasibility study undertaken by Jonathan Roberts Consulting.</li> <li>3. Education – we will provide a new primary school and have opened a dialogue via Caroline West at West Sussex.</li> <li>4. Flood Zones – the site is not at risk of flooding.</li> <li>5. Renewables – we have a strong track record in delivering environmentally sustainable energy efficient development</li> </ol>

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	Immediately post site allocation. It is intended that this will be a hybrid planning application with Phase 1 in detail, and the balance in outline to establish the masterplan in its entirety to enable a quick start on site.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	The delivery model is best illustrated by Abingworth Meadows, Thakeham. This was initiated and developed by the funders behind Hayfield Homes (ReCap), using a local builder as the contractor partner (Oakford). This received numerous awards and illustrates how our Master Plan for 'Five Villages' (as opposed to an Urban Extension) is both appropriate for the site constraints but, importantly, also acts to deliver development through local 'tried and tested' mechanisms and on a scale that fosters a strong sense of community. In short, Hayfield will develop directly to drive delivery, with scope for local builders to build bespoke elements – both will work to demanding quality standards.

	<p>Hayfield Homes' approach to quality is not like any other developer within housebuilding. This is echoed throughout our developments with all properties having a very high level of specification. This is reflected in the fact that, after only 2 years of trading, we have recently been awarded the Gold Award at the What Homes Awards and the HouseBuilder Awards.</p> <p>As set out above, we intend to secure a proportion of the site as a detailed planning approval as soon as possible to ensure that we can start to deliver homes and infrastructure by 2023.</p>
When do you anticipate construction on-site commencing?	Employing the hybrid application approach as set out above should secure the shortest amount of time to an approval for the whole site in outline and a detailed element allowing us to commence construction upon approval. Assuming the draft Local Plan is submitted to the Secretary of State for examination in Q1 2022, we can envisage a planning permission in Q1 2023 and a start on site in the same year.
When do you anticipate first completions?	We should secure a first completion within 8 months of starting on site.
How many developers are likely to be building on site concurrently?	<p>As we control the land and we would also be the lead developer we would be able to manage the sale of any land we would not construct ourselves. We anticipate that we may invite 2 other house builders in order to increase the speed of delivery of numbers, thereby creating critical mass to support the local infrastructure.</p> <p>We also own a housebuilding business called Living Space Housing. Living Space is a vibrant new Housebuilder who assertively targets development opportunities in Southern and Middle England. Living Space predominantly enters into Partnerships with Registered Providers / Housing Associations and provides a Land, Design and Construction Package for them. This allows the HA's to focus on what really matters – funding, delivering and managing high quality homes for their residents.</p>
How many sales points do you anticipate having on site?	Up to 4
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes, market sale, Build to Rent and a proportion of Retirement Living
What major infrastructure is associated with the development?	As above, the relief road and providing for the relocated station.
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	None. As part of the proposed development, we are proposing to relocate the station. However, this is not a requirement for the development as the scheme is sufficiently accessible without this additional connection. The detail still needs to be worked



	through with Network Rail, but the relocation is feasible, and would offer far better viability to Network Rail than the existing Warnham Station, and there is an opportunity to provide improved accessibility to Horsham and London.
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Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	50
2023/24	200	2024/25	300	2025/26	300	2026/27	300	2027/28	100
2028/29	250	2029/30	250	2030/31	250	2031/32		2032/33	
2033/34		2034/35		2035/36		2036/37		Beyond:	

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
<p>We have a clear Vision for 'Five Villages' at NW Horsham, including a substantial community benefits package. Based on our community engagement efforts since 2015, we accept that the Relief Road is a very high priority for Kingsfold and anyone who uses the A24 regularly. We can deliver this Relief Road with our Phase 1.</p> <p>Our Vision extends much further than this, to include high quality architecture, an extended Broadlands Campus to capitalise on the inward investment from Schrodgers, a new 60 ha community park, a 'Mobility Hub', and a mix of uses, such as a school, care home and local shops, to create a sustainable new community, integrated with Kingsfold, and connected with a new network of footpaths and cycleways.</p> <p>The proposed development is located on the right side of Horsham to expand economic development; we are in control of the land and there are no significant environmental or ecological grounds which would prohibit development. The proposals are likely to directly impact on fewer than 500 existing residents and would have little or no impact on the few designated heritage assets in the area. The development can provide new community, education and retail uses to complement the increased demand resulting from an increase in homes and employment and provide a sustainable environmentally friendly community.</p>

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.



## Horsham District Strategic Site Proforma

Site Details	
Site Address	Rookwood Golf Course, Horsham
Number of Residential Units	C1100

Promoter / Developer Details	
Name	Brian Elliott Head of Property
Organisation	Horsham District Council
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Head of Property

Site Ownership	
Who owns the land?	Horsham District Council
How many ownerships are there?	One
Is a promotion agreement in place with all landowners?	NA

Development Status	
What progress has been made to date on site assessment work?	Technical work undertaken including, Environmental Technical, transport, ecology
Has a masterplan been prepared, or is this underway?	Prepared
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	See assessment included in submission. Further planning work required with WSCC who are aware of the proposals.

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	Progress will be made immediately following allocation
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	Not yet determined. Likely to work with a JV partner. HDC wants to maximise control to ensure design principles are followed.
When do you anticipate construction on-site commencing?	3-4 years
When do you anticipate first completions?	3-4 years
How many developers are likely to be building on site concurrently?	Not known
How many sales points do you anticipate to have on site?	Not known
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes
What major infrastructure is associated with the development?	New roundabout on Warnham Road
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	No

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	
2023/24		2024/25		2025/26		2026/27		2027/28	
2028/29		2029/30		2030/31		2031/32		2032/33	
2033/34		2034/35		2035/36		2036/37		Beyond:	



Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?

In early 2020 HDC will consider delivery options and discuss with likely development partners.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Land west of Southwater
Number of Residential Units	1,200

Promoter / Developer Details	
Name	Jon Lambert
Organisation	Berkeley Strategic
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Developer

Site Ownership	
Who owns the land?	The Fletcher Trust & Christ's Hospital School
How many ownerships are there?	2
Is a promotion agreement in place with all landowners?	Yes

Development Status	
What progress has been made to date on site assessment work?	Baseline studies have been undertaken to assess the suitability of the site and inform the preparation of the masterplan. These include the following: <ul style="list-style-type: none"><li>- Topographical Survey</li><li>- Phase 1 Ecological Appraisal</li><li>- Landscape &amp; Visual Appraisal</li><li>- Archaeological Desk-based Assessment</li><li>- Strategic Heritage Review</li><li>- Great House Farm: Review of Principal Heritage Considerations</li><li>- Site Access Strategy</li><li>- A24 Pedestrian &amp; Cycle Crossing Technical Note</li><li>- Sustainable Transport Vision</li><li>- Transport Links to Christ's Hospital Station Technical Note</li><li>- New Local Centre Assessment</li></ul>
Has a masterplan been prepared, or is this underway?	An illustrative masterplan has been prepared and shared with Horsham District Council.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	In addition to the assessment work listed above, Berkeley intend to commission the following work to continue to assess the infrastructure requirements associated with the proposed development: <ul style="list-style-type: none"><li>- Highway impact assessment using the updated Horsham strategic transport model when available (Q1-Q2 2020 depending on the availability of the transport model).</li><li>- Sustainable transport strategy (Q1-Q2 2020).</li><li>- Drainage Strategy (Q1-Q3 2020).</li><li>- Utilities Strategy (Q1-Q3 2020).</li><li>- Liaison with key groups within the local community regarding community infrastructure requirements (on-going).</li></ul>

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	Berkeley would welcome the opportunity to discuss the timeframe for the submission of a planning application with Horsham District Council.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	Berkeley intends to build the development.
When do you anticipate construction on-site commencing?	Berkeley are currently delivering the Broadacres development which is located adjacent to the west of Southwater site. It is anticipated that this development will be completed in 2026. In the years leading up to the completion of this development Berkeley would like to transition on to the delivery of homes on the west of Southwater site, resulting in the delivery of homes simultaneously on both sites for a period of time.
When do you anticipate first completions?	2024/25
How many developers are likely to be building on site concurrently?	1
How many sales points do you anticipate to have on site?	1
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	The development can provide a range of types of housing to meet local housing needs, including homes for the elderly, affordable housing for rent, shared ownership homes, discount market housing and homes for key workers. The development will therefore cater for a number of different markets which will enhance the delivery rate.
What major infrastructure is associated with the development?	<ul style="list-style-type: none"> <li>- Signalisation of the A24 Hop Oast junction.</li> <li>- Improved pedestrian and cycle crossing of the A24 to the south of Hop Oast.</li> <li>- New link road between the development and Hop Oast.</li> <li>- Improved transport links to Christ Hospital Station, including a new link road between the development and Two Mile Ash Road.</li> <li>- Improved pedestrian and cycle crossing points along Worthing Road.</li> <li>- New all through school.</li> <li>- New local centre / community facility.</li> </ul>
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	No

Anticipated Delivery Rates									
2018/19	0	2019/20	0	2020/21	0	2021/22	0	2022/23	0
2023/24	0	2024/25	25	2025/26	75	2026/27	100	2027/28	100
2028/29	100	2029/30	100	2030/31	100	2031/32	100	2032/33	100
2033/34	100	2034/35	100	2035/36	100	2036/37	100	Beyond:	0

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
No.



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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Land east of Billingshurst – North of Railway
Number of Residential Units	c. 700 units

Promoter / Developer Details	
Name	Charles Collins
Organisation	Savills
Representing (if applicable)	Crest Nicholson and Bellway Homes (Joint)
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Agent acting for Developers.

Site Ownership	
Who owns the land?	All land is held in private ownership, and part is owned freehold by Bellway. All other land is held under option agreement, full land registry information can be provided to HDC on request.
How many ownerships are there?	2 owners
Is a promotion agreement in place with all landowners?	Yes – option agreements are in place.

Development Status	
What progress has been made to date on site assessment work?	A number of reports and surveys have already been undertaken at the site, including; ecological, heritage, landscape, drainage and transport.
Has a masterplan been prepared, or is this underway?	Prepared and being updated.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	It is anticipated that required infrastructure will be delivered and built out including e.g. drainage and sewerage improvements. This would be pre occupation. Further details can be included within representation to the emerging local plan review and / or through discussions with HDC planning policy.

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	A planning application will be submitted to align with the Regulation 19 Local Plan, anticipated in September 2020.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	The site will be built out by Crest and Bellway.
When do you anticipate construction on-site commencing?	Spring/Summer 2021
When do you anticipate first completions?	The beginning of 2022
How many developers are likely to be building on site concurrently?	Two Developers
How many sales points do you anticipate to have on site?	Two
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes it is currently expect to include market and affordable homes and self-build/custom build.
What major infrastructure is associated with the development?	New access route and associated roundabout off the A272. Secondary vehicle accesses linking to the existing village and pedestrian cycle links throughout.



	SUDS to serve the site and address any existing local flooding concerns.
Are there any potential “showstopping” infrastructure constraints which may affect delivery timescales?	None.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	50
2023/24	100	2024/25	100	2025/26	100	2026/27	100	2027/28	100
2028/29	100	2029/30	50	2030/31		2031/32		2032/33	
2033/34		2034/35		2035/36		2036/37		Beyond:	

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
The development is entirely deliverable within the early stages of the emerging plan period. As there are two developers this will allow homes to come forward at a faster pace and therefore assist in meeting the housing needs of the council and area early in the plan making process. This will also assist with HDC's housing land supply position going forward.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Land east of Billingshurst – South of Railway
Number of Residential Units	c. 500 units

Promoter / Developer Details	
Name	Charles Collins
Organisation	Savills
Representing (if applicable)	Crest Nicholson and Bellway Homes (Joint)
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Agent acting for Developers.

Site Ownership	
Who owns the land?	Bellway have freehold ownership of the land.
How many ownerships are there?	One.
Is a promotion agreement in place with all landowners?	N/A

Development Status	
What progress has been made to date on site assessment work?	There has been limited progress on the site assessments.
Has a masterplan been prepared, or is this underway?	An indicative masterplan has been created.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	It is anticipated that required infrastructure will be delivered and built out including e.g. drainage and sewerage improvements. This would be pre occupation. Further details can be included within representation to the emerging local plan review and / or through discussions with HDC planning policy.

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	A planning application will be submitted in 2023, following the initial construction of the site north of the railway.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	The site will be built out by Bellway.
When do you anticipate construction on-site commencing?	2024
When do you anticipate first completions?	2026
How many developers are likely to be building on site concurrently?	One Developer
How many sales points do you anticipate to have on site?	One
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes it is currently expect to include market and affordable homes.
What major infrastructure is associated with the development?	The delivery in the site will include improved vehicular and pedestrian cycle access to, and throughout, the site. SUDs will be used to mitigate any flooding concerns and the development may incorporate improvements to the Railway Crossing, to be informed by discussions with National Rail.
Are there any potential “showstopping” infrastructure constraints which may affect delivery timescales?	None.



Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	
2023/24		2024/25		2025/26		2026/27	50	2027/28	50
2028/29	50	2029/30	50	2030/31	50	2031/32	50	2032/33	50
2033/34	50	2034/35	50	2035/36	50	2036/37		Beyond:	

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?

The development is deliverable within the emerging plan period and will serve as a sustainable and logical extension to development north of the railway.

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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Newbridge Farm, Billingshurst, Horsham
Number of Residential Units	1,000

Promoter / Developer Details	
Name	Dr Chris Lyons
Organisation	WYG
Representing (if applicable)	Arunway Ltd
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Arunway is the company owned by the sole landowner

Site Ownership	
Who owns the land?	Scripps Family Partnership
How many ownerships are there?	One
Is a promotion agreement in place with all landowners?	Not applicable – the landowner is promoting the land. Several housebuilders at the upper quality end of the market are interested in the site.

Development Status	
What progress has been made to date on site assessment work?	We have undertaken the key pieces of technical work to ensure the site can be brought forward and that there is nothing to stop it progressing in technical terms. This includes ecological surveys, highways assessments, biodiversity net gain assessment, flooding and drainage assessments, landscape analysis, ensuring development is kept away from the historic environment and Ancient Woodland, amongst others. None of these are considered to be 'showstoppers' that would stop or even delay the site coming forwards and that between 800-1,000 units are achievable.
Has a masterplan been prepared, or is this underway?	Yes - this has been done and was submitted to the Council in our Deliverability Document in July 2019 and was presented at the Member briefings last year as well.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	<p>We have carried out highway's capacity assessments and junction modelling and the site can be easily accessed with limited impact on the roads and junctions around Billingshurst. The benefit of this proposal is that the landowner owns the fields next to the A29 and A272 at the critical points and so can upgrade the junctions to provide improvements to both offset the impact of these proposal but also to provide betterment to the existing situation.</p> <p>If the development is allocated then the key highways improvements can be delivered, including a 'jet lane' at the Hilland roundabout at the north of the village to increase capacity of traffic that is currently delayed going around the bypass. Coupled with re-prioritising the existing road layouts, this will provide a considerable improvement to traffic delays that currently take place in the peak times.</p>

	<p>It is also intended to provide an improved layout at the junction between the A272 and Lordings Road, which is a dangerous junction with limited visibility for traffic heading east on the A272. The landowner owns the land immediately to the west of the turning and a better solution can be provided.</p> <p>We are also offering land and a financial contribution towards a potential upgrading of the bridge over the River Arun. It is currently a narrow bridge and WSCC highways have talked about improving this for years and this would be an opportunity to achieve that and smooth the running of the A272.</p> <p>We have met with WSCC education and they are satisfied with the proposals for primary education on the site and agree that secondary education will be catered for at the Weald school. It is accepted the Weald school is almost at capacity but as new secondary schools are being offered on other larger strategic sites, it is understood that catchment boundaries will be redrawn and that pupils from this site will go to Billingshurst and others from further away will go to the closer new secondary schools.</p> <p>The proposal also includes land to be available for an extension of the Household Waste Recycling Centre on the land adjacent to the site, as a considerable benefit.</p> <p>There will be significant financial contributions towards existing health facilities in the village through CIL but land is available on the site as part of the community facility if the NHS / CCG support a new health facility being provided. A new community facility will be provided to meet the needs of the new community and ensure a community hub exists.</p> <p>The site will also deliver considerable benefits to the natural infrastructure with a 27 hectare country park, reinstatement of hedgerows and woodlands, rewilding of fields, community orchard, farm shop etc. to offer significant natural improvements.</p> <p>All technical infrastructure can be brought to the site with recent works upgrading the sewage provision. We are not aware of any infrastructure requirements that cannot be delivered or that have an abnormal cost to delivery with the close proximity to the existing village making this relatively straightforward.</p>
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Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	If the site is allocated in the Regulation 19 version of the plan (September 2020) then we would enter into a Planning Performance Agreement to ensure the site was fully progressed by adoption of the plan (December 2021) ready for an outline planning application to be submitted immediately after

	adoption. This is more than long enough to ensure this can be achieved. If the Council wanted or needed the site to come forward quicker than this then this can be achieved as the site has no significant requirements before development can commence.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	The landowner would retain overall control of the site and then sell off land parcels to individual housebuilders. This ensures the quality of the development can be retained as the landowner is local and wants to ensure a high quality legacy is ensured. We are currently in discussions with high quality housebuilders who can see the vision of what can be achieved with the massive attraction of the country park on the doorstep of the development.
When do you anticipate construction on-site commencing?	Assuming the site isn't needed to come forward earlier, and the Local Plan is adopted in December 2021, then it is likely an outline planning application and reserved matters applications could be delivered by early-2023 (the Council may be able to ensure this happens quicker).  That would allow on site works to start mid-2023.
When do you anticipate first completions?	Early 2024.
How many developers are likely to be building on site concurrently?	Still to be confirmed but likely to be only one.
How many sales points do you anticipate to have on site?	Two / possibly three for some of the time (one on the main site and another to the south of the A272 and also the site to the north).
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes – there will be a full mixture of dwelling types and tenures.
What major infrastructure is associated with the development?	See above about new highway junctions. Nothing abnormal.
Are there any potential “showstopping” infrastructure constraints which may affect delivery timescales?	No. The site is relatively easy to access with available facilities and infrastructure.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	
2023/24		2024/25	25	2025/26	75	2026/27	150	2027/28	150
2028/29	150	2029/30	150	2030/31	150	2031/32	150	2032/33	
2033/34		2034/35		2035/36		2036/37		Beyond:	

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
The site does not have the constraints of many other large sites with single ownership, no abnormal infrastructure costs, and no significant highway works required to get onto the site, so delivery of houses can start relatively quickly.



Given this site also has relatively low infrastructure requirements compared to other sites, affordable housing will be viable at the policy level and this site also offers considerable benefits to the local community compared to many other sites with a large country park, water meadows, biodiversity net gain, rewilding, and all in a highly sustainable location.

The site is deliverable, achievable and viable with considerably less risks than other sites and considerable benefits to the local community.

I have attached the Vision Document for further information.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Wealdcross, West Grinstead, Horsham
Number of Residential Units	3,500

Promoter / Developer Details	
Name	Dr Chris Lyons
Organisation	WYG
Representing (if applicable)	Thakeham Homes Ltd
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Thakeham are the proposed developer

Site Ownership	
Who owns the land?	Mr Kanabus and Mr Curtis
How many ownerships are there?	Two
Is a promotion agreement in place with all landowners?	Yes

Development Status	
What progress has been made to date on site assessment work?	Site has been assessed in terms of technical requirements as set out in submission documents and we are satisfied there are no 'showstoppers' that would prevent the site coming forwards. This has been discussed with HDC as part of the Planning Performance Agreement (PPA) process and they are satisfied there are no in-principle technical issues still to be addressed.
Has a masterplan been prepared, or is this underway?	Yes - this has been submitted to the Council and has been revised to take on-board comments from the Council and the public, following public exhibitions
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	<p>We have carried out technical highways work to demonstrate how the new junction at Buck Barn crossroads can be delivered as well as further highway improvements along the A24 and A272. This work will be on-going but see PBA report for further details. We are intending to carry out further modelling work and assessment over the next few months to further refine the model. However, it should be noted that while the new Buck Barn junction will be provided early in the process, there will be other access points into the site to allow development to commence so units can be progressed and brought forward while the new junction is delivered.</p> <p>We have also carried out technical work on ecology, flooding, drainage, landscaping, archaeology, and are progressing discussions with utility providers and all of these topics can be resolved to deliver the site.</p> <p>We are meeting with WSCC Education to discuss detailed provision of education on 16 January 2020 and are providing education requirements beyond what we understand are required.</p>

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	Assuming the revised Local Plan is still adopted in Autumn 2021 then a planning application would be submitted early 2022 as we have a PPA progressing well, and this would continue to evolve to ensure that if the site was allocated then a planning application would be ready to submit shortly after the local plan is adopted, as the details would be largely agreed with the Council and consultees at pre-app stage. The application could be submitted earlier if the Council was willing to consider that or if it needed delivery of units quicker.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	It would be primarily built-out by Thakeham although under different outlet types and will include affordable housing as well. The intention is to deliver 300 dwellings a year. Based on the current policy proposal of 35% affordable, that would be 105 a year, leaving 195 a year for private sale. These would be sold (as they are at Pease Pottage) via two different branded outlets, both owned by Thakeham. The first is the Alphium brand, which is the more contemporary brand (offering 1 and 2 bedroom apartments, and 2 and 3 bedroom houses in the main). The second brand is the main Thakeham brand (which would offer 1 and 2 bedroom apartments; 2, 3, 4 and 5 bedroom houses; 2 and 3 bedroom bungalows; and 3 and 4 bedroom chalet houses). It is anticipated that some of the delivery will be with specialist retirement partners and potentially Thakeham would look to sell parcels to some of their Housing Association contracting partners, so therefore, there could end up being four or five sales outlets running at the same time, offering different products to different areas of the market.
When do you anticipate construction on-site commencing?	Autumn 2023 (but as stated above, could be earlier if the Council needed it).
When do you anticipate first completions?	Spring 2024.
How many developers are likely to be building on site concurrently?	See above – mostly Thakeham themselves but with different brands.
How many sales points do you anticipate to have on site?	See above – 4 possibly 5.
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes – there will be a mixture of dwelling types and tenures and self-build, retirement, etc are all likely.
What major infrastructure is associated with the development?	Major infrastructure highway works including a new junction at the A24/A272 interface, improvements to A24 and A272; education (early years, primary, secondary, special educational needs, excluded children), and there will be a package of other 'normal' infrastructure requirements.
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	No. Thakeham are committed to ensuring any significant infrastructure costs are provided up front.

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	
2023/24		2024/25	200	2025/26	300	2026/27	300	2027/28	300
2028/29	300	2029/30	300	2030/31	300	2031/32	300	2032/33	300
2033/34	300	2034/35	300	2035/36	300	2036/37		Beyond:	

#### Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?

We are satisfied that the site has no ownership issues with both key landowners under option meaning there are no complicated land ownership issues to resolve so we can get on site quickly once the local plan is adopted to start preparing and delivering. We have also committed to full affordable housing requirements (Thakeham have never delivered less than the policy requirement for affordable housing), the early provision of the schools (at the developer's expense), and a package of highway improvements (including funding electric vehicles and measures to improve the air quality at Cowfold). As mentioned above, we are also proposing a series of improvements along the A24 and A272 to ensure improvements to the wider highway network.

We intend to provide the required affordable housing policy requirement and have previously advised that if the policy requires a higher percentage than the current 35% that we can deliver that.

We understand some of the other strategic sites have more complicated land ownership requirements, all the land is not under option, and viability has not been able to demonstrate that a package of full affordable housing requirements and education facilities can be offered up front on any of those sites. This site offers considerable benefits to the existing residents as well as to the new residents and will be able to deliver the solutions to improve air quality at Cowfold at last, as well as other highways and education issues in the district.

#### Zero-carbon commitment

Thakeham can confirm that this development will deliver all housing to a zero-carbon specification.

Over the last two years Thakeham have developed a product range that allows them to deliver zero-carbon homes. This home utilises photovoltaic panels on the roof to generate electricity, better insulation, triple glazed windows, heat recovery systems to move the warm air and cold air around the house, innovative forms of heating, and Thakeham will deliver its first zero carbon homes through the course of 2020.

Thakeham will announce at the end of January that it will move all its production to zero-carbon homes by 2025, at Wealdcross it will be earlier, from the first home. As a leading member of the HBF housing and the environment taskforce, Thakeham are at the front of the movement to a greener housing direction.

Thakeham are currently looking at how to develop a placemaking strategy to a zero-carbon specification as well. Already this development will yield substantial benefits in terms of electric vehicle transport, it will deliver a Liftshare scheme for the whole development and the wider area focussed on enabling car sharing. There will also be an electric bike scheme.

The core design principles will be that the development will inspire people to use non carbon related movement means, such as cycle and pedestrian use and maximise the uses of public transport. The layout and design of the development will allow people to move freely and easily between the housing areas and the village centre and further community facilities. This will be done by creating pleasant movement passages such as a riverside walk forming the spine of the development and enabling people to move quickly and easily through transit routes created to give preference to cycle and pedestrian over traditional car access.



Thakeham believes that Horsham District has the ability to chose one of the first zero carbon sizeable developments within the country and we look forward to working with them on further developing our innovative technologies. We are currently looking at how to include a battery park on the development that would see us have the ability to store power locally and therefore provide much less of a drain on the national power network.

Further exploration of grey water harvesting, and innovative water techniques would allow us to further reduce the demand on the water network across this area of the country too.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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## Horsham District Strategic Site Proforma

Site Details	
Site Address	Mayfields Market Town
Number of Residential Units	5000 for the plan period further 2,000 possible beyond

Promoter / Developer Details	
Name	Deborah Aplin Managing Director
Organisation	Mayfield Market Towns Ltd (MMT)
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Promoter

Site Ownership	
Who owns the land?	See attached Plan
How many ownerships are there?	See attached Plan
Is a promotion agreement in place with all landowners?	Legal terms have been agreed with all landowners shown on the attached plan

Development Status	
What progress has been made to date on site assessment work?	We have a PPA with Horsham council over the last year. Working with them we have submitted the following documents: - Masterplan (see attached), EIA screening and scoping assessment, (see attached) draft Design and Access Statement. (see attached)
Has a masterplan been prepared, or is this underway?	A masterplan has been produced for the whole site and work has commenced on the first phase detail, including the part of the Town Centre.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail timescales]	All of the key constraints including flood risk, drainage, services, highway capacity, landscaping and ecology have all been assessed and detailed strategies developed. Quotes for new supplies and infrastructure provision has been generally costed.

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	We are assuming that an outline application submission will only be acceptable to the Council after the Local Plan has been adopted. We could submit an application much earlier than this date if needed, by the end of 2020, but assuming that would not be acceptable we would be in apposition to submit an application by the end of 2021.
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	Our partnership with Clarion Housing Group gives us the advantage of being able to develop both affordable and open market housing from day one on land that we currently own Freehold. From the engineering work we have done to date, we know that there is only normal infrastructure required, there is good access from Wheatsheaf road. As phase one circa 250 homes progress, we will immediately commence work on the site wide infrastructure in accordance with our phasing programme, to enable plot sales to house builders. The commercial space would be developed by MMT in the early stages before a substantial hub is occupied.



When do you anticipate construction on-site commencing?	We are planning to submit Reserved matter application for the first phase alongside the outline application. The programme allows for infrastructure to commence within 6 months of receipt of the reserve matters approval.
When do you anticipate first completions?	First housing completions within 12 months of reserved matters approval. (end 2022 beginning 2023).
How many developers are likely to be building on site concurrently?	In the first 5 years Clarion both affordable and private through Latimer plus 3 to 5 house builders and at the height of the build period 8 to 10 which range from small local builders, self-build, specialists in retirement, PRS, care homes and medium size national house builders with good design credentials.
How many sales points do you anticipate to have on site?	8 flags delivering between 20 (specialist smaller builder) to 60 (including PRS) a year
Will the site cater for different markets? (i.e. Build to Rent, Self-Build, Retirement etc.)	Yes. We are proposing Self Build, PRS, Gypsy sites and some retirement units plus care homes.
What major infrastructure is associated with the development?	Primary Substation. Broadband connections, Southern Link Road within the site, off site highway improvements and Eastern Link Road, undergrounding of 132kv cables, a New Sewage Works after 2,500 homes. Note early development not dependant on major infrastructure. Plan attached on phasing of infrastructure.
Are there any potential "showstopping" infrastructure constraints which may affect delivery timescales?	No

Anticipated Delivery Rates									
2018/19		2019/20		2020/21		2021/22		2022/23	50
2023/24	150	2024/25	250	2025/26	300	2026/27	350	2027/28	350
2028/29	400	2029/30	400	2030/31	450	2031/32	450	2032/33	400
2033/34	450	2034/35	500	2035/36	400	2036/37	375	Beyond:	1,725

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?
We have secured much of the land at 2 to 3 times agricultural value, which allows MMT to fund the social and physical infrastructure, including 3 primary, special needs 100 place school and 1 secondary plus 6 <sup>th</sup> form school, medical centre, library, town hall, public open space, sports facilities, subsidise the commercial in the early days and promote space for SME's through the 'makers court' – space for small businesses to manufacture, store and retail on their own premises.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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<https://www.horsham.gov.uk/privacy-statement>.



## Horsham District Strategic Site Proforma

Site Details	
Site Address	Land at and surrounding Steepwood Farm, Adversane Lane, Adversane, RH14 9EG.
Number of Residential Units	3,500

Promoter / Developer Details	
Name	Kingswood Village Ltd
Organisation	Our Place
Representing (if applicable)	
Telephone	
Email	
Role (i.e. promoter, developer, etc.)	Owner, promoter and developer

Site Ownership	
Who owns the land?	Kingswood Village Developments (63%), Eton College (14%) and Chichester College (23%)
How many ownerships are there?	3
Is a promotion agreement in place with all landowners?	Yes. 63% of the land is owned (as per the above) and rest is under legal agreements in favour of Kingswood Village Ltd.

Development Status	
What progress has been made to date on site assessment work?	All relevant site surveys have been carried out and site constraints and opportunities identified. An illustrative masterplan has been prepared, using a landscape led approach, to allow an accurate assessment of the sustainable development capacity of the site. All detailed work was submitted in the Site Suitability submission June 2019.
Has a masterplan been prepared, or is this underway?	Yes along with supporting phasing, place making and delivery plans.
What work has been or will be undertaken in respect of infrastructure requirements / constraints? [Please detail including timescales]	All initial technical due diligence and infrastructure surveys have been carried out, and outline proposals drawn up for all necessary physical and social infrastructure (see question relating to major infrastructure requirements below). Detailed discussions have been held with West Sussex County Council and Network Rail on the relevant issues and our proposals are supported by these authorities. These proposals have been used to develop a Viability Study prepared by Turner Morum which demonstrates that the proposals are financially viable within reasonable profitability levels. This was submitted as part of the Site Suitability Submission but is attached for ease of reference.

Delivery Matters	
When are your current timeframes for submission of a planning application for the site?	End of 2020 to coincide with the Regulation 19 Draft Submission Plan
What is the delivery model? Are you intending to build-out development, or sell land on to housebuilders?	As landowner and master-developer the build out will be delivered by Our Place through self-delivery and partnerships with selected developers and contractors to build out serviced parcels to meet



	delivery projections. Our Place as master developer will retain overall responsibility and control over the quality of the development through implementation of the approved design code.
	2023 for phase 1 and associated infrastructure
	2025
	At peak build out we anticipate up to 4 developers onsite including owner/developer Our Place.
	Up to 4 at peak build out. Our Place will operate a primary master-development sales suite with each supporting serviced plot developer having their own.
	Yes, we are proposing a fully inclusive development with a broad range of units to cater for all markets including build to rent, self-build, retirement, affordable housing, affordable rent, open market housing, first time buyers etc. In addition to the housing the site will include significant employment space and supporting social infrastructure.
	<ol style="list-style-type: none"> <li>1. Re-routing of the B2133 through the site enabling closure of the Adversane level-crossing.</li> <li>2. Construction of a bridge over the Arun Valley railway line to facilitate the closure of the aforementioned level-crossing.</li> <li>3. Construction of a new roundabout on the A29.</li> <li>4. Delivery of a 6-8 FE through school.</li> <li>5. Delivery of an additional 2-3 FE primary school.</li> </ol>
	No. Work is progressing well on the above-mentioned items with detailed design and engagement of the necessary statutory providers such as Network Rail and WSCC Highways Department and WSCC Education Department. Scope of works and sign-off procedure agreed with WSCC for the railway crossing.

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	0		62		77		125		150
	150		220		220		230		230
	230		230		230		230		1116

Do you have any additional comments regarding the achievability, economic viability or timing of the development of this site?

Please see our submission for the Site Suitability Assessment of June 2019, responding to the Site Assessment Criteria published by Horsham District Council in May 2019.

We would be delighted to discuss the content of this Proforma in advance of it being completed. My contact details are as follows: [gboyd@iceniprojects.com](mailto:gboyd@iceniprojects.com); or 077 66 88 179.

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