



Report to South Lakeland District Council

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PLANNING AND COMPULSORY PURCHASE ACT 2004

SECTION 20

REPORT ON THE EXAMINATION INTO THE SOUTH LAKELAND CORE STRATEGY DEVELOPMENT PLAN DOCUMENT

Document submitted for examination on 26 November 2009

Examination hearings held between 16 March and 26 March 2010

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Non-Technical Summary

This report concludes that the South Lakeland Core Strategy provides an appropriate basis for the planning of the District to 2025. The Council has sufficient evidence to support the strategy and can show that it has a reasonable chance of being delivered.

A limited number of changes are needed to meet legal and statutory requirements and to ensure consistency and deliverability. These can be summarised as follows:

- Change to Brownfield land development target from 50% to 'at least' 28%
- Replacement of housing split for smaller settlements with grouped targets
- Deletion of local occupancy element of Affordable Housing policy
- Inclusion of retail as possible land use element for Kendal Canal Head AAP
- Clarification of site appraisal process and criteria for employment land selection
- Clarified need to address Kendal highways and traffic issues in Allocations DPD
- Re-phased housing delivery for Ulverston to aid regeneration needs of Barrow

Many of the minor changes recommended in this report are based on suggestions put forward by the Council during the Examination in response to points raised by participants. They do not alter the essential thrust of the Council's overall strategy.

ABBREVIATIONS USED IN THIS REPORT

AA	Appropriate Assessment
CS	Core Strategy
DPH	Dwelling per hectare
DPD	Development Plan Document
EiP	Examination in Public
HMA	Housing Market Area
KSC	Key Service Centre
LDS	Local Development Scheme
LSC	Local Service Centre
PDL	Previously developed land
PPS	Planning Policy Statement
PSC	Principal Service Centre
RSS	Regional Spatial Strategy
SA	Sustainability Appraisal
SCI	Statement of Community Involvement
SCS	Sustainable Community Strategy
SHLAA	Strategic Housing Land Availability Assessment
SHMA	Strategic Housing Market Assessment

Introduction

- i.
- ii. **This report contains my assessment of the South Lakeland Core Strategy Development Plan Document (DPD) in terms of Section 20(5) of the Planning & Compulsory Purchase Act 2004. It considers whether the DPD is compliant in legal terms and whether it is sound. Planning Policy Statement (PPS) 12 (paragraphs 4.51-4.52) makes clear that to be sound, a DPD should be justified, effective and consistent with national policy.**
- iii. **The starting point for the examination is the assumption that the local authority has submitted what it considers to be a sound plan. The basis for my examination is the submitted DPD (SD1a & b). However, on submission the Council had identified a number of changes which it suggested would help to ensure that the Core Strategy would be sound (SD1c). These comprised a mix of editorial corrections and what the Council described as minor changes. In order to ensure maximum possible local consensus before and during the examination hearings further possible changes were discussed with a variety of local representors.**
- iv. **My report is set out broadly in plan order although housing and employment land policies are considered after the district-wide development strategy to provide an informed context to consideration of the district's sub-area strategies which break down the numeric targets to the local level.**
- v. **Appendix A lists the Council's suggested changes none of which were advertised before submission and which were added to during the hearings. As a result consideration of their merit forms part of my examination. Appendix B is a list of minor edits including typographical and grammatical errors which do not address soundness. Since this list was added to during the examination hearings they are all included here for the sake of comprehensivity. Appendix C lists the three changes I conclude are necessary to make the Core Strategy sound. The more significant of the Council's changes and my suggested changes were advertised and representations received after the hearings but before I made my final conclusions as to their merit.**
- vi. **To comply with the legislation it is necessary for all the changes in Appendices A, B and C to be subject to a recommendation in this report. This is set out in my Overall Conclusions and Recommendation.**
- vii. **The examination hearings ended in late March 2010. The election of the new government subsequently led, in July, to the revocation of all Regional Strategies (RS-former Regional**

Spatial Strategies, RSS) with immediate effect. This included the RSS for the North West adopted in 2008 (RLP2).

- viii. **However, in line with Section 24 of the 2004 Planning and Compulsory Purchase Act the Core Strategy had been prepared to accord with the former RSS in most respects, and submitted for examination on that basis. The Council and representors were consulted as to their views on the implications of this change (and also two changes to national policy in PPS3 *Housing*) for the South Lakeland Core Strategy (ED54 & 56). The Council's responded that its intention is broadly to follow the strategic framework set by the evidence base underpinning the former RSS since, in most respects, it aligns with its own needs assessments and the strategy's evidence base. Where relevant the views of representors on these matters are addressed in the report.**
- ix. **It is clear that the plan and its comprehensive evidence base has sought to respond to the local circumstance of South Lakeland and its neighbouring areas, including the two national parks. Its content is thus attuned to the locally assessed needs and the sub-regional context in which the area co-exists. Accordingly, I consider that local interests are best served by concluding my examination along the lines indicated by the Council as the competent and elected local planning authority. It follows that the RSS, while no longer a part of the statutory development plan for the purposes of Section 38(6) of the 2004 and related Planning Acts, helps to explain how the Council's plan was derived. I refer to it hereafter strictly on that basis.**
- x. **In commenting on the revocation of the RSS, the Council put forward a range of text changes to the DPD acknowledging its changed status. This is a sensible and pragmatic approach and would ensure that the document is clear and accurate. Consequently, I endorse the Council's suggested text changes in Appendix D to be incorporated within the CS prior to its adoption.**
- xi. **The Council also suggested various consequential changes to the Submission Core Strategy and its Appendices to simplify and streamline its structure and to clarify and reflect the document's adoption as compared to language and content more appropriate to the submission stage. None of the changes in Appendix E alter the thrust of the policies and are endorsed in the interests of clarity.**
- xii.

Assessment of Soundness

This section considers the soundness of the submitted DPD and makes recommendations relevant to specific Main Issues. Detailed changes arising from the recommendations are listed in Appendices at the back as follows:

- A Changes the Council considered necessary to make the plan sound;
- B Minor editorial changes suggested by the Council;
- C Changes which I conclude are necessary to make the plan sound;
- D Council's editorial changes to reflect RSS Revocation;
- E Council's minor consequential changes.

Issue 1 – Whether the spatial strategy is soundly based and in accordance with national policy and the local evidence base?

The planning area for the Core Strategy falls into three distinct and physically discrete areas with differing challenges:

Kendal, Milnthorpe, Kirkby Lonsdale and their rural hinterlands to the east;

Ulverston, and parts of Furness close to Barrow to the far west;

Cartmel Peninsula to the south-west.

Key district-wide issues and objectives identified include;

Growing the local economy in a sustainable way in a period of sub-regional economic restructuring;

Providing housing to meet local need in an area of high house prices and limited jobs and housing choices for young people;

Protecting and enhancing the quality environment;

Improving accessibility of services and jobs and reducing car dependency;

Maintaining and improving health and community wellbeing.

The Council's approach of focusing growth and new development in larger settlements, and generally restricting development in surrounding rural areas elsewhere, accords with the objectives of national guidance, the former RSS and the Cumbria and Lake District Joint Structure Plan and is supported by generally up-to-date evidence.

CS1.2 sets out a 4 tier settlement hierarchy with approximate percentage shares of the former RSS anticipated housing and employment growth over the plan period to 2025 allocated to specific main settlements. This identifies Kendal (35%) and Ulverston (20%) as Principal Service Centres (PSCs) and Grange-over-Sands, Milnthorpe and Kirkby Lonsdale (combined 13%) as Key Service Centres (KSCs). In the main the distribution is a more or less proportionate sharing of growth in proportion to each place's historic share but with a skew towards the Principal and Key Service Centres where there is the greatest level of services and jobs and hence scope for reduced travel and increased sustainability.

An opinion expressed on behalf of several local house-builders was that the designation of the proposed settlement hierarchy was likely to be ineffective in delivery terms and hence unsound. They argued that allocating residential growth on 'the basis of functional areas' identified by reference to former RSS identified sub-regional areas associated with the Principal and Key Service Centres, as mooted at the Preferred Options stage, would be preferable. In essence such an approach would balance the population growth over a wider net of smaller outlying settlements functionally related to the Principal and Key Service Centres, they said.

However, I note that the Sustainability Appraisal evaluated this option and discounted it. To my mind the merits of this approach are not clearly supported by the evidence. I consider that the technical evidence, backed up by the 'frontloading' work carried out with local stakeholders and community support, indicates that the designation of those settlements within the proposed hierarchy is sound and provides a good basis for sustainable growth.

Also defined within the policy is a list of 17 larger villages as Local Service Centres (LSCs) intended to accommodate about 21% of new housing and employment development.

Beneath this is a level of smaller villages and hamlets where development will be confined to limited infilling and rounding off. The villages would have a combined share of plan-wide housing growth of about 11%. Development is strictly controlled in the open countryside.

Local concerns were raised about the designated choices of the LSCs and the quality of the data which informed the selection process. Particular queries were raised for differing reasons in relation to Beetham, Storth/Sandside and Heversham/Leasgill.

The Council acknowledged that the LSC qualifying factors could change over the life of the plan as settlements gain or lose services and facilities and through changes to public transport provision. It accepted that as a result the criteria would need to be monitored to ensure their continuing relevance and the extent to which the quantity of development would be appropriate and deliverable within the LSCs. The Local Development Scheme (LDS) envisages that the forthcoming Allocations of Land DPD will assess the amount of new housing and employment at the detailed level.

Text changes to subsequent policies suggested by the Council (considered later) clarify that this level of the settlement hierarchy is intended as a strategic policy and is not prescriptive as to the precise level of new development which would be anticipated in each place. Rather it is intended as a grouped target needed to satisfy the balance of the district wide housing and employment needs. More detailed work looking at balancing local needs and environmental capacities outside the PSCs can properly be conducted as part of the Allocations of Land DPD process. Given the relatively modest level of area-wide growth ascribed to this level of the hierarchy I consider that this is a sensible and pragmatic approach which can be properly responsive to local needs and preferences and which I support.

Key stakeholders, including Cumbria County Council, were concerned that the aspiration of 50% of new housing and employment development on previously developed land (PDL) was not sufficiently supported by the evidence. Before the hearings this led to agreement between the County Council and the District Council that the policy should more closely reflect the best available local evidence by including a target of 'at least 28% of new housing development to take place on such sites' as a minor change (SOCG1). In my view the changed target was more than a minor change and needed to be advertised. Having included the change in the advertised Inspector's Possible Changes schedule, and carefully considered the responses (ICC1-29), I conclude that, unless the suggested change is made, the plan would contain an unrealizable target which would undermine and confuse users about the need to seek greenfield land to meet development needs, and hence would be unsound. Accordingly I endorse the Council's proposed change (**CC4**) that amends the target and makes this part of the plan sound.

In relation to the Introductory sections and the preamble and justifying text to the Spatial Strategy, I endorse the Council's suggested changes to text and graphics put forward as being necessary to make the plan sound by achieving maximum clarity (**CC1-CC3, CC5-CC7**).

Issue 2 – Whether the amount and distribution of housing is justified and appropriate

Overall level of provision

The former RSS set a requirement for the Core Strategy area of 400 dwellings per annum between 2003 – 2021. In line with the earlier indications given by the Council on its general support for the RSS policies, I understand that this increased annual level of housing numbers (by reference to the previous RSS/RPG) was supported by the Council in the RSS Examination in Public (EiP) based on its own local evidence of housing and social needs. It follows that it is a logical starting point for considering locally assessed needs.

National policy in PPS12 expects the plan period to be 15 years and hence the annual rate has been rolled forward to 2025 so that a 15 year housing land supply can be shown in accordance with the requirements in PPS3. Consequently, from the plan's base date of 2003 some 8,800 dwellings are proposed to be provided over the full plan period to 2025. The relatively limited supply of new houses delivered in 2003 – 2009 (1,305 or 186 pa) is such that to meet the gross requirement by the end of the plan period now requires an average supply of 468 dwelling per annum for the remaining years to 2025. How and where this challenging target should be delivered has been the subject of substantial local research.

Local Housing Needs

The local evidence base included Housing Needs and Market Assessments in 2006 and 2009 (HOU7 and HOU2/HOU8). The six defined Housing Market Areas (HMAs) include parts of the Lake District and Yorkshire Dales National Parks. Key findings include:

Affordability is worsening across each HMA with the rise in prices fuelled by in-migration and second home ownership limiting local access to available supply;

The district-wide median income to house price ratio is 9.5:1; even those more affordable HMAs (eg Ulverston & Furness and Kendal) are unaffordable to newly formed households with income-to-price ratios well beyond government guidance;

The need for affordable housing has increased since 2006 and is now 733 pa (this figure includes 213 for Central Lakes which lies largely in LDNP ie outside the district's core strategy area and where new development is highly constrained);

A dual market operates to serve affluent households with sufficient equity to move into or around the area, and those existing and newly formed local households reliant on affordable housing to meet their needs;

Lack of affordable housing is seen by employers as a barrier to recruiting staff;

Lack of affordable housing drives people of working age and especially young people out of the area with harmful consequences for the local economy and the creation of balanced communities;

Population projections show an increasingly ageing population especially in the 75+ age group.

Several local communities are concerned at the levels of housing growth proposed fearing that it would be unsustainable and damage their local environment. However, given the area's need to address affordability issues, to reverse structural economic weaknesses, and to build sustainable communities, alongside the limited scope for major housing development in the national parks, the local evidence is strongly supportive of the need and demand for additional new housing on the

overall scale anticipated in the Core Strategy. I endorse the adoption of the Council's suggested change (**CC25**) ensuring that the SHMA evidence continues to inform local housing requirements and land supply.

In strategic terms I conclude that the area-wide amount of housing over the plan period is justified and appropriate to the needs of a district where median house prices are well beyond the reach of many who aspire to own their own home.

Housing Land Supply

Using the revoked RSS housing delivery requirement the national PPS3 stipulation for a rolling five year available housing land supply would require land for some 2,340 dwellings (468x5). To catch up to the gross former RSS figure by 2021, as suggested by some local house-builders, would lift the requirement to 491 dwellings per annum. In my opinion, having regard to recent delivery levels, this rate would be unsustainable by placing too great a burden on local communities and infrastructure even if the market conditions and building capacities were favourably inclined to deliver at this rate. In a period of national economic downturn the latter is highly questionable and for these reasons the Council's annualised figure is therefore preferred as being more realistic and more likely to be achievable.

The Council's evidence shows that at 2009 there were some 964 units with planning permission, equivalent to just over two years supply (although this equates to just over 3.5 years supply at the extant local plan target of 265 dwellings per annum). However, the Strategic Housing Land Availability Assessment (SHLAA – HOU1) demonstrates that there are enough Category 1 (ie deliverable) strategic sites available within and very close to the identified 52 settlements to accommodate up to about an additional 4,020 dwellings. The Council's inability currently to show a five year housing land supply does leave the district vulnerable to potentially harmful 'planning by appeal' and this underlines the pressing need for firm allocations via the forthcoming Allocation of Land DPD. However, subject to detailed work and testing via that process, the available evidence does indicate that there would appear to be readily achievable options for allocations to come forward over the next few years so that a five year supply would be in place as soon as possible. In line with PPS3, windfalls have not been included in the delivery trajectory but historically they have made a contribution in both Kendal and Ulverston and are likely to continue to do so.

When the admittedly less certain Category 2 ('developable') sites from the SHLAA and the South Lakeland Employment and Housing Land Search Study of sites outside settlements (HOU5) are factored in, there would be sufficient housing land to meet the 10 and 15 year dwelling supply requirements. These studies do not seek to identify sites with absolute certainty. That task is to be carried forward by the Allocation of Land DPD. But in my view the study findings against a range of economic scenarios, are sufficiently robust to lend credence and weight to the Core Strategy's housing supply trajectory and associated land supply.

Distribution of new Housing

Turning to the proposed geographical distribution, the principles underlying the overall distribution of new development have been considered within the preceding section on the Development Strategy. More specifically in relation to housing it has also followed the principles established by national policy in PPS3 and the former RSS policy to focus new development on the most sustainable and well served locations by use of a sequential approach to site development.

In furtherance of these principles the Council undertook various research exercises and drew on other recent corporate research to understand the local housing needs and the land supply capacities of the various main settlements having regard to the overall balance set in the Development strategy.

At the hearings there was further discussion, carried forward from the earlier spatial strategy discussion, about the possible need to treat the larger towns as 'functional areas' rather than the allegedly arbitrary sub-areas proposed in the plan, as had been floated at the Preferred Option stage. By way of explanation and example, for Kendal this would mean treating outlying villages such as Oxenholme, Natland and Burneside as outliers of a functional 'greater Kendal' and collectively able to contribute to the town's considerable new housing needs notwithstanding that these villages are outwith the town's built-up area and settlement limits as defined in the extant local plan.

While there may be some merits to this approach I am not persuaded that the Council's method and subsequent proposal are materially deficient. Since its approach is broadly supported by many stakeholders, and there is insufficiently weighty counter evidence, I consider that it has not been shown to be unsound.

Nevertheless, having listened to local concerns expressed about the levels of residential growth in the KSCs and LSCs, as shown in the Housing Split table on p75 (ie beneath the level of the PSCs - Kendal and Ulverston), the Council sought to clarify that its intention had been to give an indication of the aggregate levels of new housing rather than a prescriptive allocation to each place. I accept that unless this suggested change was made clear, and proper and balanced consideration of local needs and constraints at the Allocation of Land DPD stage allowed for, then the Core Strategy would be potentially misleading and unsound. This process would be further clarified by the Council's suggested condition on using the SHMA findings to inform future needs. I therefore endorse the Council's suggested changes (**CC25-28**).

Density and the Efficient use of Land

The main housing supply policy is complemented by policy CS6.6 '*Making effective and efficient use of land and buildings*' by using the recent historic benchmark of 30 dwelling per hectare (DPH) as an average indicative target for all housing developments, with higher densities on

appropriate sites close to transport hubs or main bus routes. The average figure was used to help inform the likely residential land requirements through the SHLAA research, albeit with bespoke densities applied to individual sites.

After the hearings closed the new coalition government announced two changes to national guidance in PPS3, on the impact of which all participants were consulted:

Exclusion of residential garden land from the definition of PDL in Annex B;

Deletion of the national indicative minimum density of 30 DPH from para 47.

Having considered all of the responses (GCC1-15) I note that the Council, supported by some, though not all, representors, concluded that these policy changes had little strategic impact on the Core Strategy. In particular the SHLAA had not been heavily reliant on so called 'garden grabbing' land supply. Any such sites which came forward would be considered as 'windfalls' and were not counted in the strategic supply numbers. Moreover, there were other design and environmental policies in the plan which would complement the national aim to ensure that sites were not overdeveloped by schemes harmful to local character.

On the indicative density issue the Council was satisfied that the average indicative density used in its housing supply projections was appropriate to the majority of the urban areas which it had identified for growth. As such it was necessary to address sustainability issues including minimising greenfield land-take. Inasmuch as local characteristics may dictate lower densities in certain localities the strategy contained sufficient flexibility to seek higher densities near public transport nodes and hence to produce an average out-turn based on 30 dph without harm to local environments. In short, the indicative density of 30 dph was locally appropriate.

I have considered the views of those who, in view of the PPS3 changes, consider the approach to be unsound and in need of review. However, in my view the available evidence supports the Council's position in these regards and no change is required. However, I endorse the Council's suggested changes (**CC33 and 34**) which would clarify the role of compulsory purchase powers in helping to deliver housing objectives where necessary and the role of the brownfield land target in helping use land effectively.

Dwelling Mix and Type

Policy CS6.2 aims to ensure that new development offer a range of housing sizes and types to meet the full range of differing housing needs, to ensure adaptability of dwellings to be able to cope with different stages of life, and to encourage the provision of different types of accommodation for the elderly. Implementation of the policy would be guided by the evidence in the Housing Need and Market Assessment and the Council's Housing Strategy Group. Local housebuilders said that to ensure maximum benefit and market realism there should also be a continuing

dialogue with them as well as internal advisers and the suppliers of specialist accommodation. I agree. While I see no need to change the policy in this regard, PPS3 actively encourages dialogue with house-builders and specialist providers. The success of the policy would be made more likely if this best practice was followed by the Council in a clear and transparent way. I understand the Council is reviewing its approach to this.

The need to build to the Lifetime Homes standard (which addresses the need for building adaptability through the Building Regulations) was queried. Local builders considered that it was not appropriate to all types of development. A similar point was made in respect of the Code for Sustainable Homes, also an emerging Building Regulation requirement.

As a generality planning policy should not seek to duplicate other legislation. However, the area has an above average level of elderly people and increasing life expectancy and so I see good reason to make clear the mutually reinforcing role of an appropriate housing mix and adaptability which should be encouraged in all suitable developments. As I see it the policy should not, and does not, seek to enforce the Lifetime Homes standards for every new development. This should be a matter for negotiation and continuing dialogue with all parties as mentioned above, with the aim of ensuring maximum adaptability in the most appropriate accommodation. The wording change agreed during the hearings would remove the prescriptive requirement and make this process clearer and hence is supported. The Council's suggested deletion of the requirement to meet the Code for Sustainable Homes would also avoid duplication of the role of the Building Regulations and policy CS8.7 and is supported for similar reasons. Accordingly I endorse the Council's suggested change (**CC29**).

Issue 3 – Whether policies on affordable housing & local occupancy are sound

Policies CS6.3 and 6.4 address the need to make provision for affordable housing in settlements and rural areas and also to make some dwellings subject to local occupancy conditions for similar reasons. They are considered collectively.

Need for Affordable Housing

In the broader context the former RSS stated: "*to a greater or lesser extent there is a shortage of supply of affordable housing in all parts of the North West.*" It will be apparent from the earlier contextual analysis that the district faces major problems of housing affordability. Median house price ranged across the plan area from £183,000 in Kendal to £309,000 in rural Kendal, with 2008 price to income ratios of 7:1 in Kendal and 10.5:1 in rural Kendal.

Recent market reductions indicate that these ratios may have fallen slightly but there is clearly a pressing need for affordable housing likely to be experienced over most, if not all, of the plan period. In terms of

absolute quantum the 2009 Housing SHMA estimated the need to build about 437 affordable homes per annum in the plan area (ie outside the national parks) in the period 2009-14. Even allowing for sub-area variations, the need for some district-wide policy initiative is clear from the evidence.

Meeting the Need

All parties agree that such a level of provision (ie 437 pa) is not feasible and pragmatism is needed. However, in line with the spread of local needs the plan proposes allocating sites in all communities to secure some provision for local need. In particular policy CS6.3 aims to secure 35% of dwellings as affordable homes on sites of 9 or more within the PSCs and KSCs (ie the five main towns), and on sites of 3 or more outside these areas. Within the rural areas policy CS6.4 aims to provide 100% affordable housing on rural exception sites outside the settlement boundaries where market housing would be precluded.

Having regard to the area's pressing and geographically widespread need I consider that the Council has provided robust evidential justification for going beyond the indicative 15 dwelling threshold in paragraph 29 of PPS3.

The same PPS3 paragraph (backed up by subsequent case law) requires Councils also to make an assessment of the economic viability of thresholds and proportions and their potential impact on overall levels of housing delivery. This matter is addressed by the Viability Impact Study of March 2009 (HOU4a) which used May 2008 market values to examine the impact of a range of policy options for the various housing market areas. An update in August 2009 (HOU4b) tested the impact of the proposed 35% provision on a series of specific development scenarios against 2008 house price, falls of both 10% (as witnessed), and 15% (on a 'what-if' basis) below the May 2008 levels. It also tested viability for the two thresholds in different housing market areas on the basis of differing mixes and development costs.

In my view the two studies lend weight to the appropriateness of the thresholds and the quotas across the various sub-areas, albeit that development viability at 35% is likely to be more marginal in the lesser value areas. The study also suggested that the viability of schemes was subject to a range of variables and costs which made certainty in marginal situations difficult. For example house-builders questioned the assumed 15% gross profitability used in the studies, saying that a minimum of 20% was more normal, especially in a time when development funders were likely to look for higher returns to reflect the greater lending risks involved.

These reservations lead me to conclude that, although the policy thresholds and target are sufficiently supported in current evidence, considerable care needs to be taken in policy implementation. Rigid adherence to 35% in all cases in a period of falling house prices and funding limits could lead to landowners and developers not promoting

schemes, especially in the areas of lower residual value. This would be counter-productive to the policy aim by harming the supply of open market houses while not producing any affordable housing.

In my view a sensitive approach is enabled by the policy wording which allows for site-specific negotiation of a lower level of affordable housing where there is clear evidence that 35% would make a scheme unviable. Such site-specific negotiation could also deal with the preferred tenure and house size mix related to specific local needs which could similarly have an effect on viability in marginal cases. For similar reasons I endorse the Council's suggested wording change (**CC30**) to enable a higher percentage to be sought on sites allocated in DPDs where need is shown and viability is not compromised.

I conclude, on balance, that the affordable housing policy in respect of the two thresholds and the 35% target is sound, but that the economic conditions and actual out-turns will need to be closely monitored to ensure that general market housing supply is not adversely affected by an over-rigid application of the policy. No change to the policy is necessary in this regard.

Local Occupancy Element of Policy CS6.3

In addition to the affordable housing requests, to address local affordable housing needs in all areas outside Kendal, Ulverston, Milnthorpe and Grange-over-Sands policy CS6.3 also seeks to limit the occupancy of residential schemes of three or more dwellings by imposing a local occupancy condition. The proposed policy element seeks to regularise and refine an already operating non-statutory, and un-examined, local policy (IPATH). The element would require a further 35% of housing schemes of 3 or more dwellings to be subject to a local occupancy condition, with the balance of 30% being available for unfettered open market housing.

National policy guidance in Circular 11/95 on Planning Conditions states: "If the development of a site for housing is an acceptable use of the land, there will seldom be any good reason to restrict occupancy of those houses to a particular type of person (eg those already living or working in the area). To impose such a condition is to draw an unwarranted distinction between new houses or new conversions and existing houses that are not subject to such restrictions on occupancy or sale. It may deter house-builders from providing homes for which there is local demand and building societies from providing mortgage finance. It may also impose hardship on owners who subsequently need to sell it..."

Similar policies to that proposed by South Lakeland are operated in the adjoining Lake District National Park and Eden Valley district where there are also pressing problems of rural housing affordability and environmental constraints on new building. I accept, too, that in the rural areas there is strong evidence of need and inability to compete, so that local people are often priced out of the market by wealthier in-migrants and/or second home owners. However, the policy appears to apply a blanket approach to all of the rural areas without details of the specific

local need which may justify it in any particular case, as sought by national policy above. I understand that the Inspector examining the nearby Eden Valley Core Strategy had similar reservations and recommended a change requiring a considerably more focused approach to local need.

The Council cited former RSS policies L4 and L5 as being collectively supportive of its approach. However, former RSS policy L5 relates specifically to Affordable Housing and refers to local occupancy criteria being used to inform conditions and obligations intended to support such Affordable Housing provision. Former RSS Policy L4, in both the policy and its supporting text, does refer to the need to address local needs and affordable housing needs. But it is not clear that this is intended to be achieved through the mechanism of occupancy conditions on open market housing, as compared to specific and/or specialist provision such as elderly persons or key worker accommodation by a range of providers including RSLs to provide a mix of appropriate house types, sizes, tenures and prices as outlined in the L4 policy first bullet point.

In the light of these reservations I consulted the representors and the general public on a less stringent approach to the same policy. Responses from local communities lent a degree of support to the policy approach. However, local builders maintained their objections stating that as well as being out of step with national policy, it was likely to be unworkable and lead to a reduction in housing schemes coming forward. This is because developers could not easily value the price differential represented by a condition which could only be lifted after much uncertainty and delay by way of a complex cascade mechanism. While this is difficult to prove I consider that there is some merit in these points.

The available evidence on the success of the IPATH policy to date is limited, but it is far from conclusive that the policy is achieving its desired effect. If anything the modest number of completions over 3 years tends to support the points made on behalf of local house-builders. My attention was drawn by the Council and objectors to recent appeal decisions relating to refusal to withdraw local occupancy conditions which, having regard to their separate and individual merits, had been resolved in different ways. The full evidence in these cases is not before me, and I make no comment on the merits of the decisions save to say that they illustrate the complexity of the policy and the uncertainty which it has generated. The fact that one of the original permissions had 12 sub-sections and the cascade mechanism a further 10 sub-sub-sections suggests to me that the IPATH policy was cumbersome and "*involved too detailed and onerous an application of development control*" (Circular 11/95) and thus is not workable.

While there may be merit in a more focused policy based on very clear and compelling local needs and circumstances (eg Key rural workers or particular localities) I conclude that in the proposed form this element of the policy is unsound. None of the alternatives arising from consultation was clearly preferable, and in my opinion any review of this policy should in any event be subject to further work and wider public consultation.

Deletion of this strand of the policy would not render the rest of the policy or the CS as a whole unsound. If the Council still remained persuaded of the merits of some form of local occupancy condition to sit alongside its affordable housing policy, it could bring forward a more refined policy, possibly as part of the Allocations of Land DPD, where independent examination would enable its soundness to be tested.

As a result of these findings I recommend that the local occupancy part of Policy CS6.3 be deleted, along with associated justifying text, by adopting **IC3**.

Travelling Communities

Policy CS6.5 addresses the accommodation needs of Gypsies, Travellers and Travelling Showpeople. It seeks to ensure the provision for identified need is met on sites identified through the forthcoming allocations of land DPD in accordance with specified criteria based on national guidance. In line with the former RSS the accommodation needs of the various groups have been analysed and set out in the Cumbria Gypsies and Travellers Accommodation Study 2008 (HOU6a-c). The number of sites to be provided is modest. I endorse the Council's change (**CC31**) that the text should make reference to the study so that the identified need is clearly acknowledged.

A pending review of the regional need had presaged somewhat higher figures, but the Council had contested these. The abolition of the RSS leaves the Council in the position of being able to determine for itself whether the level of need identified in the 2008 study needs to be reviewed. Consequently I conclude that the thrust of the policy is in line with national guidance and sound.

However, in response to comments the Council proposed separating out Gypsies & Travellers from Travelling Showpeople to allow greater sensitivity to cultural and economic differences between the two groups and their different functional and locational needs. In the interests of clarity and effectiveness I endorse this suggested change (**CC32**).

Issue 4 – Whether economic & employment policies, including the amount & distribution of employment land and retail policy, are sound (Policies CS7.1, CS7.2, CS7.3, CS7.4, CS7.5, CS7.6 CS7.7)?

Evidence underpinning the strategy's approach to the local economy and employment includes the Northwest Regional Economic Strategy 2006, the Cumbrian Economic Strategy and Sub Regional Action Plan 2009 (ECO10a & b), and the Employment Land and Premises Study (EC08). The latter is supplemented by the South Lakeland Knowledge-based Employment Land search and Assessment (2007) and the Council's Employment Land Position Report 2008 (ECO1).

Context and Strategy

The district currently has relatively low unemployment and provides economic opportunities for communities in the neighbouring national parks. However, while tourism and retailing are successful sectors many such jobs have low pay. This, a decline in traditional manufacturing jobs, and limited scope for new service sector/office jobs, means that there is a drift of young people away from the area to look for higher education and work, and significant commuting out of the district to higher paid jobs elsewhere in the region. In addition the number of (retired) elderly people and the average age is rising. Such economic imbalance is seen to represent a risk to community cohesion and regeneration in the medium and longer term. There are low employment vacancy rates in most parts of the district and a shortage of allocated, high quality and unconstrained sites to permit inward investment and local company expansion.

The strategy therefore seeks to enable the economy to become more self-reliant by growing local enterprises in higher knowledge sectors, and by boosting jobs and training opportunities. Given the need to add to the local housing supply to address issues of affordability and balanced communities, the area also need to be able to grow the economy by ensuring a good choice of accommodation for growing and incoming new businesses. In line with national guidance in PPS4 the strategy seeks to ensure the provision of sufficient new employment land to enable the economy to exploit a range of new economic opportunities.

Employment Land

The Employment Land Review of 2005 was undertaken in accordance with national best practice guidance and comprehensively examined all relevant factors. It pointed to a shortage of available employment land within the area in terms of sites which are available and in attractive and unconstrained locations. This limited supply leads me to accept that new employment land allocations are needed if the economic potential of the area is to be successfully addressed. This is particularly so for the eastern side of the area where shortages of allocated land are most evident. In my view evidence for an increased level of new allocations is robust.

However, there is a limit on the amount of PDL land in the district. Moreover, the area also enjoys high quality landscape and limited unemployment. These suggest that the allocation of the necessary amount of new allocated (and most probably greenfield) employment land in the most sustainable locations will be challenging. For this reason the quantum of land necessary is of crucial importance for the creation of fully sustainable communities. The likely slow-down in national and regional economic growth in the first few years of the plan seems likely to add further uncertainty in this regard.

There is no reason to doubt the survey evidence collected for the 2005 study (ECO8) as supplemented by the 2009 South Lakeland Housing and Employment Land Study (HOU5). However, I am less confident of the subsequent analysis, forecasts and policy prescription. In particular, its conclusion that 60 hectares of new employment land is required for the 15

years of the plan period seems to me, on its own evidence, to be a figure at the high end of the range of possible job-growth scenarios.

The 2005 study itself confirms (p69) that the historic district-wide new employment land take up between 1999 and 2004 was some 10.45 hectares, equivalent to 2.1 hectares per annum. During roughly this period (1998-2003) the district experienced an 11% growth in the number of employees by 4,461 to a total of 45,674 (p45), only some of which could be ascribed to additional net out-commuting. In other words the district's job market progressed well in that time on an employment land take-up of just over 2ha per annum. By contrast policies CS7.1 and 7.2 anticipate doubling this to 4ha per annum to provide 60 hectares of allocated land in total. The estimate appears to anticipate an above average share of employment land growth going to B8 warehousing and distribution uses. Such development is likely to have potentially adverse traffic implications in the towns and the emphasis does not, at first glance, seem consistent with the need to encourage higher added value activity.

Nevertheless, there is no firm counter-evidence to demonstrate that the plan's figure is without evidential support and hence unsound. I am also aware of the desirability, in an ideal and unconstrained world, of having a ready supply of land to meet differing types of development needs. However, in my view the range of variables in play (including assumptions about economic growth, sector mix, plot ratios, ideal vacancy rates and average job densities) are such that there is potentially a margin of error in the study's projection of likely employment land needs. The tension between evidence and policy intent is regrettable. However, the preparation of the Allocations of Land DPD will, of necessity, require work to assess and confirm the amount and type of employment land needed which is ultimately a matter for local judgement by the Council. While this tension is of significance, on balance I do not conclude that it renders the Core Strategy unsound, as reaching such a conclusion in this case would result in important progress being halted.

I endorse the Council's suggested text changes (**CC35 - 37**) which recognise the need to take account of employment provision in the neighbouring Lake District National Park area in considering employment land and distribution matters, and also clarify the role of the Allocations of Land DPD in the wider process.

Distribution of employment land allocations

The suggested split of site types and locations in policy CS7.2, and their geographical focus on the main towns, with modest levels for local service centres and other rural settlements, is well supported by the evidence. It is generally consistent with national policy guidance as well as the plan's own spatial strategy. In particular the identification of the needs for Strategic Employment and Business/Science Parks in or close to Kendal and Ulverston appear well grounded on the locational evidence and likely to help deliver necessary regeneration in these places.

However, a refinement of the policy wording seeking to clarify the sequential approach to site search and analysis of site selection criteria for the Strategic Employment sites in or close to Kendal (including the M6 corridor between the town and junction 36), and at Ulverston, was debated at the hearings. In view of the importance of this process and the need to ensure the best environmental outcome, possible changes were advertised. Having weighed the consultation comments I endorse the Council's suggested changes (**CC38 and CC66**) as being necessary to make this part of the plan sound.

Other employment policies

The balance of the employment strategy in policies CS7.1–7.4 is supported in evidence, consistent with the rest of the policies and is generally sound. These policies also appear consistent with national policy guidance and with the local evidence underpinning the former RSS.

Town Centre and Retail Strategy (Policy CS7.5)

The Town Centre and Retail strategy is based on evidence from the Council's Retail Study 2007 (ECO5) the preparation of which followed national guidance in former PPS6. This is complemented by Town Centre Health Checks (ECO2). The retail study used survey data from a 2005 household survey supplemented by 2005 Experian expenditure and population data and 2006/7 store turnover data from Verdict Grocery Report. It looked in detail at the five key town centre shopping areas and their catchment areas to determine the quantitative need for new floorspace in convenience and comparison goods shopping in each.

Kendal is by some way the dominant market town, with catchments extending many miles into the rural hinterland including both national parks; it retains the great majority of its convenience and comparison goods expenditure. The policy approach is broadly to maintain the existing hierarchy of centres and to ensure that Kendal remains attractive and competitive so that it retains its position in the sub-regional retail hierarchy in line with the aims of the former RSS. There is widespread support for that objective.

The study identified a quantitative need for additional convenience goods floorspace in Kendal arising mainly from overtrading in out-of-centre stores, and in Ulverston arising from leakage to neighbouring Barrow. High levels of convenience goods expenditure 'leakage' were also identified for Grange-over-Sands and Milnthorpe from which significant local expenditure is 'lost' to Kendal. To ensure the continuing viability of the smaller towns, and to reduce the need to travel, the policy seeks to re-balance the local convenience needs 'offer' at the smaller centres 'by addressing high levels of leakage to outside areas'. This approach is in line with national guidance in PPS4.

Queries were raised about the study's conclusion that the identified overtrading in the two out-of-centre Kendal supermarkets, Asda to the south-east, and Morrisons to the north-east. Discussion on the methodology

and resultant quantum of additional convenience goods floorspace which could be justified in Kendal was inconclusive.

This is a live issue in the town as a planning appeal against the Council's refusal of the 'out-of-centre' retail redevelopment of the Kendal Rugby football ground (some distance north of the town) was recently dismissed. The appeal Inspector's dismissal of the scheme before him was based on the proposal's adverse local traffic impact. He effectively accepted the retail need for the proposed 10,682 sq m (gross) of retail floorspace, including a 5,109 sq m single foodstore. Other developers are believed to be examining supermarket proposals. At the examination the Council's retail specialist opined that the balance of overtrading in Kendal would not support a third superstore in the town, and that such spending should be diverted to qualitative improvements in and around the town centre and elsewhere. Retail developer representatives said that the study had underestimated the level of additional expenditure, and that there was sufficient demand to support a third superstore. 'Artificial' re-distribution of surplus expenditure to lower order centres, such as Milnthorpe, on the scale demonstrated, was not realistic and unlikely to be feasible, in their view.

At the examination most of the informed parties present accepted that a time horizon of 5-10 years was the most realistic period that could be predicted with a degree of confidence. For Kendal this raises a dilemma as the Core Strategy proposes the delivery of 2,714 new homes in and around the town over the next 15 years with the bulk loaded towards the later years. This growth was not factored into the 2005 study. Attempts to consider this at the hearings were inconclusive. In my view there is a possibility that the Retail study has inadvertently underestimated the level of convenience expenditure likely to be in the town within the 15 year plan period.

However, there is no conclusive evidence that the strategy is fundamentally flawed, especially as the policy sets no firm quantitative thresholds or targets. Having regard to national policy in PPS4 (EC1.4) and related best practice guidance, it is regrettable that more up-to-date and conclusive retail evidence was not available to inform the Core Strategy. By failing to do so, the preparation of the Allocations of Land DPD will, of necessity, require work to assess and confirm the quantity of retail development needed with particular reference to Kendal's planned housing numbers and likely resultant population growth. Whilst this deficiency is of significance, on balance I do not conclude that it renders the Core Strategy unsound, as reaching such a conclusion in this case would result in important progress being halted. Any proposed scheme on the scale currently being considered would, in any event, need to be accompanied by a retail impact assessment. This includes examination of the sequential test, with the aim of focussing new retail proposals either in, adjoining, or as close as possible to, existing town centres.

The Council suggested a wording change to policy CS7.5 (**CC39**) to indicate that it would support convenience and comparison goods provision, of an appropriate scale which aids the vitality and viability of

Kendal Town Centre. Since this is consistent with national policy in PPS4 and flows from the evidence I endorse this suggested change. No other changes are necessary to make the retail policy sound.

Tourism Development

In view of its important role in the local economy Policy CS7.6 aims to support tourism by supporting the creation, enhancement and expansion of tourist attractions and tourism infrastructure. In striking a balance between employment and the conservation of the environment encouragement will be given to proposals that improve high value-added tourism, with emphasis placed on improving the quality of visitor accommodation and the need to broaden the range provided.

A major holiday site operator questioned the need for a specific element of the policy to address the upgrading and enhancement of existing holiday parks, an activity in which it is currently engaged. However, Local Plan policy T6 remains in place and is permissive of modest new caravan development outside the Arnside-Silverdale AONB. This, and Policy CS7.6, when read together, offer a sufficiently encouraging steer to new development of this sort while retaining environmental quality. I conclude that no change is necessary to the policy.

Energy/Low Carbon Opportunities

Policy CS7.7 aims to help the area exploit the economic potential for industries aiming to help the area and the nation to reduce carbon by helping to generate and supply different forms of renewable energy and to re-cycle waste. It is generally consistent with national policy to combat the adverse effects of climate change and with former RSS policies in the same regard.

Some representors argued that the policy was not sufficiently pro-active as the area had lots of natural potential and an adaptable industrial heritage which made it well suited to take maximum advantage of economic opportunities. However, the Council is working with a range of partners to assist existing and newly growing enterprises in this field. The intended allocation, under policy CS7.2, of Business/Science Parks in Kendal and Ulverston to attract higher-added knowledge based businesses, is one part of this effort. The Council is committed to working collaboratively with the national parks in this field. To these ends it has suggested minor text changes to acknowledge the role of its Wind Energy SPD in determining planning applications and to indicate general support for the notion of environmental/renewable energy technology business clusters in Kendal and Ulverston. Since they are consistent with the thrust of the submitted policy I endorse these changes (**CC40 and 41**). No further changes are necessary.

Issue 5 – Whether the Core Strategy makes adequate provision for the protection of the natural environment and other environmental assets?

South Lakeland has a high quality environment highly valued by local communities and by visitors. In its vision and spatial portrait the plan sets out its overarching aim to protect and enhance the locally distinct qualities of place which make the area special. This issue runs through the entire plan and is addressed by the Spatial Strategy, the sub-area strategies and in a suite of policies in Section 9, 'Quality Environment'. These policies are founded on a comprehensive evidence base which has recorded, evaluated and which promotes the special and particular nature of and need for: providing green infrastructure (CS8.1); protecting landscape and settlement character (CS8.2); providing and accessing open space, sport and recreation (CS8.3a & b); protecting and enhancing bio-diversity and geo-diversity (CS8.4); conserving and enhancing the Coastal landscape and heritage (CS8.5); safeguarding and enhancing the historic environment (CS8.6); promoting sustainable construction and low carbon energy (CS8.7); ensuring new development avoids flood risk (CS8.8); dealing with waste and minerals in an environmentally sound way (CS8.9); promoting good quality design appropriate to its place (CS8.10).

The examination hearings considered how the Core Strategy can meet its growth targets whilst performing its statutory duty to safeguard and where possible enhance the full range of protected and significant sites and/or features. There was widespread support from nearly all quarters for this suite of policies and little substantive challenge to their aims or to the evidence bases which underpin them. However, three specific areas require more detailed consideration as follows.

Landscape and Character Protection and Coast

Cumbria County Council was concerned that the strategy should reflect current best practice on landscape typology and impact assessment, rather than being reliant on a landscape area analysis. The District Council agreed a jointly suggested text change to Policy CS8.2 to deal with this. In my view this would clarify both the aims of landscape protection and the process of scheme assessment and policy implementation.

With regard to the Arnside-Silverdale Area of Outstanding National Beauty (AONB), the managing body (a cross-boundary jointly funded organisation) has a statutory duty to produce a five yearly management plan. This seeks to ensure that the AONB's natural beauty and conservation features are preserved and enhanced. The management plan necessarily sits alongside the Core Strategy and the two should reinforce one another. The Council suggested text changes to policy CS8.2 would make this clearer and ensure regard is had to the AONB Landscape and Seascape Assessment when assessing development proposals. I endorse the suggested composite change (**CC42**) for those reasons.

With regard to the Coastal protection policy CS8.5 I endorse the Council's suggested changes which would clarify the approach to sea level rise and

increased flooding and storm events and the Morecambe Bay and Shoreline Management Plans (**CC45**).

Biodiversity and Geodiversity

The aims of Policy CS8.4 to protect the extensive and wide-ranging biodiversity and geodiversity value of the area are widely supported. However, Cumbria County Council pointed to the need for policy to refer explicitly to the evolving Cumbria Biodiversity Action Plan. The latter includes the need to protect but also to restore and enhance valued habitats and features. The District Council agreed and a series of agreed changes are proposed. These would be consistent with national policy and international obligations and so I endorse the suggested changes (**CC43 and 44**) to the explanatory text and policy wording in the interests of clarity and effectiveness.

Historic Environment

To be fully consistent with national policy in PPS5 policy CS8.6 requires a further bullet point so as to safeguard and enhance sites of archaeological importance and other minor clarifications. I endorse the Council's suggested change (**CC46**) for that reason.

Sustainable Construction

To clarify the relationship of Policy CS8.7 to the Building Regulations and Code for Sustainable Homes and to avoid duplication I endorse the Council's suggested change (**CC47**).

Minerals and Waste

The Council's suggested text change (**CC48**) would clarify the relationship of the Core Strategy to the Cumbria Mineral and Waste Development Framework and the likely role of the site a Kendal Fell Quarry in treating waste and is endorsed in the interests of clarity.

Design

In line with national policy the Council's suggested addition to Policy CS8.10 (**CC49**) would emphasise the importance of new design supporting and enhancing local distinctiveness and is endorsed in the interest of improved clarity.

Issue 6 – Whether the policies on Health and Wellbeing including Infrastructure and Developer Contributions are sound?

Policy CS9.1 aims to improve the health and wellbeing of all residents through ensuring that new development helps to deliver a variety of community provision and services. While there were questions over how,

in some cases, these aims might be met, there is widespread support for their aims. The Council suggested changes (**CC50**) would strengthen the scope for delivery in relation to improved Air Quality Management and the provision of residential care homes for the elderly and other specialist care accommodation. I endorse the suggested changes to the policy wording in the interests of clarity and effectiveness.

One of the means of implementation of this section's policies is by the use of Section 106 Planning Obligations, the rationale for which is set out in Policy CS9.2. In response to representors the Council acknowledged that the policy and explanatory text to Policy CS9.2 should make more explicit reference to national policy in Circular 05/2005 which confirms the underlying principles of when and in what ways developer contributions can rightly be sought. The Council said that implementation of the policy would be aided by the use of a Supplementary Planning Document (SPD) on this topic and that preparation of this was already in its LDS. The Council also agreed with Cumbria County Council as local highway authority that in rural areas the policy should refer to contributions to help sustainable transport measures to offset the impact of development in more remote locations, and, more generally, that it should enable Travel Plans to be secured as part of possible transport impact measures.

The suggested revised text would remove an arbitrary threshold of 10 dwellings and the changes as a whole would ensure that the policy was fully in line with national policy. For these reasons I endorse the Council's suggested changes (**CC51-53**).

Issue 7 – Whether the policies on Accessing Services and Transport Impact of new development are sound?

Policy CS10 sets out criteria to ensure that accessibility improvements throughout the district will be sought. It contains a list of both physical and organisational measures to be carried out in conjunction with a range of partners. These include the use of regeneration funding and developer contributions to ensure that access to employment areas in Kendal and Ulverston are upgraded without harming local air quality. Complementary policy CS10.2 aims to ensure that new development is designed to reduce the need to travel and to secure safe and convenient means of access.

Representors questioned whether the policies were fully deliverable, especially in relation to traffic movements and new traffic generation in Kendal. I consider this matter in the sub-area policy for the town. However, no conclusive evidence has been shown to make these policies within the plan unsound in this regard.

With the Highways Agency and the County Council the Council agreed to propose minor wording changes to ensure: that development's parking proposals are in accordance with standards in the sub-region; and to the use of national guidance thresholds to trigger necessary travel assessments and travel plans. I endorse these changes (**CC54 and 55**) to the text and policy wording in the interests of clarity and effectiveness. No other changes are necessary to make the plan sound in this regard.

Issue 8 – Whether the following sub-area policies can deliver new sustainable development on the scale proposed and protect the environment?

In addition to the area-wide strategy, because of the district's varied nature the plan contains four area spatial strategies which set out the more particular aims for each 'sub-area'. They are not intended to provide a definitive list of proposals and projects, but to give an overall approach to creating sustainable communities in each area. I consider the soundness of the detailed sub-area strategies for specific parts of the plan area having regard to the preceding more general consideration of the topics.

Policy CS2 for Kendal

Kendal is the main town in the area and hence designated as a Principal Service Centre. As well as its shopping and education functions it enjoys healthy commercial and service sector (office) jobs. In line with the spatial strategy the town is expected to accommodate considerable new growth in houses and employment land. Key issues include the regeneration of the town in general and the Kendal Canal Head Area Action Plan (AAP) in particular, provision of 3,080 new dwellings to 2025, the accommodation of 21 hectares of employment development land, and improved public transport and accessibility especially in the congested historic town centre.

During the hearings there was a good deal of support for the need to address housing affordability and to grow the local economy. However, there were strong voices from the Town Council, a local residents' grouping and others that, while some modest level of development was not objectionable, the strategy was trying to accommodate too much in an historic town whose character and uniquely attractive landscape setting would be permanently damaged by growth on the scale proposed.

The problems of town centre peak period traffic congestion and related Air Quality problems are apparent. The County Council as the highway authority acknowledged that the level of growth was likely to be a challenge. The Kendal Transport Assessment 2009 (TRA1) modelled the likely transport scenario on the basis of potential development sites and concluded that several junctions now operating at or close to their theoretical capacity would exceed that and experience worsening traffic congestion over the plan period.

The town centre gyratory system, the limited river crossings and the congested traffic in the Shap Road/Appleby Road corridor were shown to be traffic 'hot spots' where peak period congestion was already a regular feature and likely to worsen. The likelihood of funding of an inner relief road to help relieve congestion and improve air quality seems remote at the present time and hence has not been proposed. All parties agreed that the full level of new development would need to be reviewed as further investigative work and details of schemes became available as part of the Allocation of Land DPD process.

The expectation is that by a combination of junction improvements and proactive traffic management measures including parking policy, travel plans, public transport, walking and cycling improvements behavioural change could avoid or mitigate the worst effects. The Council suggested wording changes to the text requiring a demonstration of traffic viability before further employment land is developed in the Shap Road/Appleby Road corridor and other defined locations. I endorse these changes (**CC8, CC11-13, CC15 and 16**) as necessary in the interests of clarity and effectiveness.

I also endorse the Council's suggested changes **CC9** and **CC10** which clarify the need to relocate the existing Household Waste Recycling Centre at Canal Head prior to any regeneration development, and the anticipated role of social rented housing in meeting affordable housing need in the town.

Turning to the Canal Head AAP, it is proposed to bring forward coordinated and complementary redevelopment of underused PDL within the former Lancaster Canal head area, including possible re-opening of the canal, improvements to the riverside, and improved linkages to the town centre and the town's conservation area. There was considerable debate about the deliverability of this complex project. Also considered was the wish of one of the major landowners, Gilbert Gilkes and Gordon the long-established and successful turbine manufacturing firm, to redevelop on a new production site within the area, and the related need for possible enabling development in the form of a supermarket, as well as new housing and a hotel.

A detailed scheme is not before me and I have not been party to the costings and viability testing of possible options. But it is clear that any scheme including a new bridge over the River Kent would be a substantial project needing to attract major funding partners. In such a scenario, given the area's relative proximity to the town centre and the likely spending levels available I consider that there is a need to include the option of an appropriate scale of retail development within the list of possible elements of a regeneration scheme for the AAP. The precise level of the retail floorspace would be dependent on assessments of retail, traffic and visual impact on the conservation area and the settings of listed buildings among others. I recommend that change **IC1** and the Council's related clarification change **CC14** be made to ensure clarity and help deliverability.

Finally the reservations about the possible landscape impact of new development of scale on the setting of the town prompted the Council to suggest changes to Policy CS7.2 which I agreed to in an earlier section. The use of the sequential approach and site selection criteria along with the protection of the local plan's green gaps pending more detailed review should allay the fears of some that the level of new employment land would cause unacceptable damage. The Allocation of Land DPD process will allow this topic to be closely scrutinised with the aim of accommodating new development without spoiling the town's setting and special character.

Policies CS3.1 & 3.2 for Ulverston & Furness

Ulverston and its rural Furness hinterland lie in the south-western corner of the district, close to the boundary with Barrow-in-Furness. As well as Ulverston the area contains a number of LSCs and smaller rural villages and hamlets. Like Cartmel Peninsula the area is linked by rail to Lancaster and Barrow, but is relatively remote from the national motorway network to which it is linked by the partly dualled A590 dual carriageway. Key issues include the need to strengthen the economic base which has suffered structural decline, to regenerate the town, to develop new housing and address affordability issues, and to regenerate the Ulverston Canal Area. The lower lying part of the area close to Morecambe Bay is at some risk of coastal flooding.

Stakeholders and respondents were supportive of the policies' aims to regenerate the town by a mix of new employment and housing, while also regenerating the underused Canal Head area. However, concern was expressed by Barrow BC at the 1,760 new homes proposed for Ulverston by 2025. It felt this was too many and could dominate Barrow's own new housing provisions and put at risk the successful implementation of its Barrow Port AAP, recently examined and found to be 'sound'. At the heart of Barrow's regeneration plan is a proposal to deliver 925 dwellings out of some 2,700 in the borough to be provided between 2003 and 2021. Barrow Council is close to agreement with the putative lead developer of the large Barrow Island Urban Village who has pointed out the risk profile of such a large project. The Council's concern is that, since the housing markets and travel-to-work areas overlap, market conditions may lead developers to forsake the costly and more challenging 'brownfield' development of the port area in favour of the more straightforward prospect of greenfield sites in and around Ulverston. Having travelled between the two towns and seen Barrow's housing renewal areas I consider that there is some basis for this concern.

However, both Barrow's regeneration plans and South Lakeland's aim to regenerate Ulverston enjoyed the support of the former RSS and there appeared to be no obvious reconciliation mechanism. It is unfortunate that a joint housing strategy was not worked up between the two Councils. After the hearings I consulted, without prejudice, on the proposition put by Barrow Council that there should be a modest reduction of the housing numbers for Ulverston and redistribution to other parts of the district. While some people were not strongly opposed to the notion, there was a strong expression of opinion against the idea from Kendal communities. Having reviewed the consultation comments and the evidence, there is ultimately little firm evidence to indicate that the housing and regeneration needs of Ulverston should be materially reduced to assist a neighbouring housing market area.

In my view a preferable approach would be slightly to re-phase the Ulverston housing delivery towards the later phases of the plan period. This would help Barrow's redevelopment proposals to achieve momentum prior to larger number of houses being built in Ulverston. Accordingly I recommend that change **IC2** be made.

With regards to the Canal Head and corridor area, the lack of a firm proposal to prepare an AAP to carry forward the 2004 Ulverston Canal Head and Corridor Master Plan (ED34) does not inspire confidence that co-ordinated regeneration action could commence soon. However, the Council explained that the future of the part-disused major industrial complex, owned and operated by GSK, is currently uncertain as the company considers its operational options. In such circumstances I agree that it would be premature to commit to an AAP process which could be stillborn if the company's plans change materially. However, the Council will need to keep this issue under close review and be ready to review the Master Plan as soon as the GSK position is clearer and stakeholder consultations permit. Accordingly I endorse the Council's suggested change (**CC17**) which makes this clear.

I also endorse the Council's suggested changes (**CC18, CC19 and CC20**) which clarify: the role of social rented housing in meeting affordable housing need in the town, the need to locate employment and office development in accessible locations, and the need to link the site allocation process to the Canal Head Masterplan and any future review thereof.

Policy CS4 for Cartmel Peninsula

The Cartmel Peninsula is a relatively secluded rural place jutting into Morecambe Bay south of the Lake District between Ulverston and Furness to the west and Kendal and rural hinterland to the east. The area is served by a railway line linking Lancaster to Barrow and the rest of West Cumbria. Facing Morecambe Bay and backed by attractive rural hinterland the main settlement, the KSC of Grange-over-Sands, is a popular holiday and retirement location. LSC villages include Cartmel, Allithwaite, and Cark/Flookburgh.

Plan aims for the area include: in Grange - regeneration and promotion of the town centre service role and moderate levels of new housing; in the LSCs - smaller scale housing development; optimizing the use of limited commercial land to help the local economy to prosper; maintaining/strengthening tourism across the area; improving public transport and pedestrian access; and protecting the local environment.

In the light of local congestion issues and the environmental constraints local community interests in Grange were concerned at the possible level of additional new housing, the adverse impact that this may have on the town, and the need for greater clarity on delivery. Conversely house-builders were concerned by the lack of a specific housing target for Grange as a KSC.

It is clear that further detail will be necessary to firm up specific plans for the area, but in my view the level of further detail necessary is more appropriate to the forthcoming Allocation of Land DPD. I consider that at the strategic level Policy CS4 is generally consistent with the Spatial Strategy and that the rest of the policies would ensure sufficient control over environmental and traffic issues.

I endorse the Council's suggested minor wording changes (**CC21 and CC22**) to clarify the plan's necessary linkages with the emerging Shoreline Management Plan, and the level and delivery mechanisms of affordable housing, in the interests of effectiveness.

Policies for the East, including Milnthorpe and Kirkby Lonsdale

The sub-area for the East includes the more-or-less free-standing historic market towns of Milnthorpe, south of Kendal, and Kirkby Lonsdale, lying further east towards the Dales, and the attractive rural hinterlands surrounding them. Key issues include: maintaining and improving their function as Key Service Centres, providing affordable housing, protecting the natural and historic environments, and improving public transport access to the Key Service Centres.

While local builders questioned the possible housing role of the villages closer to Kendal, there was little dissent to the main elements of the sub-area strategy itself. To achieve consensus the Council suggested some minor wording changes to help the clarity and effectiveness of the plan and to acknowledge the close relationship between the KCS of Milnthorpe and the outlying hamlet of Ackenthwaite. I endorse these changes (**CC23**) in the interests of clarity.

I also endorse the Council's suggested change (**CC24**) to clarify: the role of social rented housing in meeting affordable housing need in the towns.

Issue 9 – Implementation and Monitoring

The plan's implications for infrastructure provision have been the subject of an Infrastructure Report (SD6). In the present financial climate there is less certainty about the precise sources, levels and timing of funding likely to be available to help implement the growth plans in the strategy. However, the implementation and monitoring framework shows that the Council is aware of the needs and is in close consultation with necessary funding bodies and partner delivery agencies. On the evidence I am satisfied that the strategy includes a reasoned and balanced approach to the provisions of necessary infrastructure and that it is generally consistent with the advice in PPS12 and is sound in this regard.

More generally the monitoring targets are sufficiently precise and able to provide an adequate basis for monitoring of the DPD through the Annual Monitoring Review. The Council has proposed a raft of mostly minor changes to pick up minor errors and omissions and to deal with queries raised by representors. These changes also seek to clarify the relationship of the plan to saved policies in the Local Plan (including the extant settlement boundaries and Green Gap designations in LP policies H5 and C2) and how these will be reviewed through the Allocations of Land DPD. Accordingly, I endorse changes **CC56-72** in the interests of clarity, effectiveness and deliverability.

Changes

Appendices A - E of my report include the various changes arising from examination of the submission document many of which were discussed at the hearings:

- A Changes the Council considered necessary to make the Plan sound;
- B Minor editorial changes suggested by the Council;
- C Changes the Inspector concludes are necessary to make the Plan sound;
- D Council's editorial changes to reflect RSS revocation;
- E Council's Minor Consequential changes

For each necessary change the reason has been given in the body of the report. Reasons for the Council's suggested changes (which I endorse) are generally clear from their content but they are also explained more fully in the Council's own documentation (ED47).

Legal Requirements	
Local Development Scheme (LDS)	DPD contained within approved LDS December 2008 (SD15) with submission date of October 2009. Actual submission in November 2009 not fatal.
Statement of Community Involvement (SCI) and relevant regulations	SCI adopted in September 2006 (SD10A+B). Council's consultations comply with SCI and with the requirements in Regulations.
Sustainability Appraisal (SA)	Carried out and adequate for purpose (SD7, 8 & 9).
Appropriate Assessment (AA)	To meet requirements of EU Habitats Directive two stage AA undertaken (ENV1 & 2). Subject to acceptable mitigation measures no significant harm to conservation of: Morecambe Bay SAC, SPA and RAMSAR site; Morecambe Bay Pavements SAC; River Kent SAC.
National Policy	DPD complies with National Policy except where indicated and changes are recommended.
Sustainable Community Strategy (SCS)	SCS in place for 2008-28 (RLP6). Links to SCS are shown in Section 2 of CS Appendix B - DPD shows satisfactory regard to strategic aims.
2004 Act and Regulations (as amended)	DPD complies.

Overall Conclusion and Recommendation

I conclude that, with the changes proposed by the Council, set out in Appendix A, and the changes that I require, set out in Appendix C, the South Lakeland Core Strategy DPD satisfies the requirements of s20(5) of the 2004 Act and meets the criteria for soundness in PPS12. Therefore I

recommend that the plan be changed accordingly. And for the avoidance of doubt, I endorse the Council's proposed minor changes, set out in Appendix B, its proposed editorial changes in regard to the revocation of the RSS, set out in Appendix D, and its minor Consequential Changes in Appendix E.

Philip A Goodman

Inspector

APPENDIX A CHANGES THE COUNCIL CONSIDERS NECESSARY TO MAKE THE PLAN SOUND

These changes were, proposed or supported by the Council, in some case prompted by Representatives in Statements of Common Ground and also through the public hearings. In Column 1 'CC' refers to 'Council Change' and the numbers in brackets to the Council's Final Schedule of Proposed Changes (ED47). I endorse them in the interests of clarity and effectiveness.

Report ref (no in brackets is Council's schedules ref)	Policy or section	Change
CC1 (SLDC11)	Para 1.37	Add: "The special qualities of the Arnside and Silverdale AONB have been conserved and enhanced." After "...National Parks." and before "Towns and villages..."
CC2 (SLDC12)	Para 137	Add text at end of 1st sentence, to read; "without significant detrimental impact on landscape character".
CC3 (SLDC13)	Para 1.38 Environment boxed text	Add text in 2nd bullet point to read: "Promoting prudent use of resources, minimising the generation of waste, promoting recycling and preventing where possible or mitigating..."
CC4 (SOCG1)	Policy CS1.2	Delete reference to 50% target for new development to take place on previously developed land. Policy to read: "Priority will be given to the reuse of existing buildings and previously developed land for all new housing development, with a target of ensuring that at least 28% of new housing development takes place on such sites".
CC5 (SLDC1)	Policy CS1.2 para 2.15 & Fig 6	Add new 2nd sentence to justifying text para 2.15 to read: "There are a large number of smaller villages and hamlets in the district, of which only 25 are indicated on Figure 6". Publish A4 size Figure 6 to improve the legibility of text.
CC6 (SLDC15)	Key Diagram	Increase size of Key Diagram to A4 Add list of Local Service Centres and

		<p>number accordingly</p> <p>Enlarge size of symbol for principal key service centre</p>
CC7 (SLDC16)	Key Diagram	<p>Add the A591 road from A590 to Windermere A5074, and the A65 from Junction 36 to the border with Lancashire</p> <p>Show these routes as regional road routes.</p> <p>Add new text in key, after words 'Regional Road Route' add: "(trunk and non-trunk RSS Policy RTc Diagram 3)".</p> <p>Add sub title in the key relating to the road routes with wording "Principal routes".</p>
CC8 (SOCG2)	Policy CS2 para 3.20	<p>Add new sentence at end of para 3.20 to read: "The alternative strategy will also involve providing measures which impact on the travel behaviour of occupants of existing developments in order to provide sufficient capacity on highways and transport networks"</p>
CC9 (SOCG3)	Policy CS2 para 3.26	<p>Add new sentence at end of para to read: "The delivery of the regeneration of the former Kendal Canal Head area will only occur if a suitable site can be found for the relocation of the Household Waste Recycling Centre (HWRC). Within the County Council's Minerals and Waste Site Allocations document, land next to the Kendal Fell Quarry has been identified for the relocated HWRC. Support is given including access onto the A591/bypass for the relocation of the HWRC to such a site, this proposal will be recognised in the South Lakeland Allocations of Land DPD".</p>
CC10 (SLDC2)	Policy CS2	<p>Amend policy CS2 to replace the phrase: "...and that at least 60% of affordable housing is social rented, based on local need" with replacement text: "...and that <i>up to</i> 60% of affordable housing is social rented, based on local need, to be sought and delivered by a variety of means including Registered Social Landlords, public subsidy from the Homes and Communities Agency and developer contributions in accordance with the</p>

		approach set out in Appendix 1".
CC11 (SLDC3)	Policy CS2	<p>Add new bullet point and text under title economy to read: "Where possible locate new employment uses (B1 class b and c, B2 and B8) where they are not only accessible (or can be made accessible) by walking, cycling and public transport from main residential areas, but also provide good connections to the strategic transport network without any detrimental impact on the town centre network".</p> <p>Add new bullet point and text under title economy to read: "Focusing as far as possible new office development (Use Class B1 a) in or adjacent to Kendal Town Centre".</p>
CC12 (SO CG4)	Policy CS2	Amend text relating to travel plans to read: "Ensuring that developers of all new significant developments include and duly implement a Travel Plan"
CC13 (SLDC17)	Policy CS2	Amend text in middle of last Environment bullet point to read " Minimise both air pollution, through implementation of Air Quality management plans, and the risk of flooding"
CC14 (PHS2)	Policy CS2 para 3.32	Add new text as a sub para 3.32b following bullet points to read: "In order to enable the early delivery of the regeneration scheme, any comprehensive planning applications submitted prior to the adoption of the AAP would be considered in the context of the criteria listed above and the objectives of the emerging AAP and other elements of the Core Strategy. Applications would not be refused solely on the basis of prematurity of the AAP".
CC15 (SO CG5)	Policy CS2 para 3.42	Add a new sentence after 2 nd sentence to read: "Developer contributions should also be sought to improve the pedestrian and cycle network and where a Travel Plan is required in order to ensure it's successful implementation and to address the resource requirement that a Travel Plan creates".
CC16 (SO CG 6 7)	Policy CS2 para	Delete existing para 3.43 and replace with

<p>& 8)</p>	<p>3.43</p>	<p>following para to read: "Specific junction improvements are identified in the Transport Assessment to accommodate LDF growth. These improvements and those required to bus services, and walking and cycling routes, will be funded through a combination of developer contributions and potential public sector funding to be identified in the ongoing South Lakeland Infrastructure Delivery Plan".</p> <p>Add new text as sub para 3.43a to read: "Using the findings of the Kendal Transport Assessment and its recommendations, it is considered that the following principles should be used to help inform future decisions regarding the spatial strategy for Kendal. The results of the modelling and the principles below will be used to inform the Allocations of Land DPD:</p> <p>Further development within the Shap Road/Appleby Road corridor needs to be assessed to determine whether its transport and movement impacts can be accommodated as there are significant capacity issues regarding HGV and other peak traffic flows;</p> <p>Further development at the Todds site, west of Burneside Road and Stonebank Green (the boundaries of these sites are shown in the Kendal Transport Assessment), needs to be assessed to determine whether its transport and movement impacts can be accommodated;</p> <p>Further development at Kendal Canal Head needs to be assessed to determine whether its transport and movement impacts can be accommodated as there are significant capacity issues in the evening peak period;</p> <p>Encouragement of sustainable transport, including greater use of walking, cycling and public transport should be continued as a priority. This encouragement should include the development, implementation, monitoring and enforcement of Travel Plans;</p> <p>Recognition that it is not possible to make improvements at many road junctions without land take and this would involve the demolition of existing buildings;</p> <p>There is a need to explore all possible</p>
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		<p>options and benefits to improve road access between the A591 Kendal bypass and the A6 Shap Road; Town Fringe Parking sites that have good walking, cycling and bus links to the town centre and employment areas will be pursued and options for potential park and ride will be considered; South Lakeland District Council will review with Cumbria County Council parking locations and management arrangements to assist in the reduction of traffic in the town centre and encourage more walking, cycling and bus use". Add new text as paragraph 3.43b following the above text to read: "It is proposed that Kendal will accommodate a significant amount of employment land. The location of this will need to take into account the findings of the Kendal Transport Assessment and include evaluation of whether improved links to the A591 would benefit existing business and existing town centre infrastructure. As such it is considered that before employment land can be proposed in the Shap Road/Appleby Road corridor, the transport impact should be identified and any necessary improvements to the transport or services be secured; the assessment to include the possibility of infrastructure improvements by developer contributions".</p>
<p>CC17 (SLDC60)</p>	<p>Para 4.25 Ulverston & Furness tomorrow</p>	<p>In 3rd bullet point amend text to read: "Responding positively to future intentions of GSK (as a major employer in the area) through the development of a major employment regeneration site"</p>
<p>CC18 (SLDC4)</p>	<p>Policy CS3.1</p>	<p>Replace the phrase: ".. and that at least 60% of affordable housing is social rented, based on local need" with the replacement text: "...and that up to 60% of affordable housing is social rented, based on local need, to be sought and delivered by a variety of means including Registered Social Landlords, public subsidy from the Homes and Communities Agency and developer contributions in accordance with the approach set out in Appendix D".</p>

CC19 (SLDC4a)	Policy CS3.1	<p>Add new bullet point and text under title economy to read: "Where possible locate new employment uses (B1 b and c, B2 and B8) where they are not only accessible (or can be made accessible) by walking, cycling and public transport from main residential areas, but also provide good connections to the strategic transport network without any detrimental impact on the town centre network".</p> <p>Add new bullet point and text under title economy to read: "Focusing as far as possible new office development (Use Class B1 a) in or adjacent to Ulverston Town Centre.</p>
CC20 (SLDC61)	Policy CS3.2	Delete last sentence in the policy and replace with words to read "Specific land allocations for the area will be pursued through the Allocations of Land DPD, informed by the Ulverston Canal Head Masterplan and any subsequent review of its contents".
CC21 (SLDC62)	Para 5.24/5.25	Delete para 5.25. Add new text at end of para 5.24 to read "The outcomes and finalisation of this process could have significant implications for any future development."
CC22 (SLDC5)	Policy CS4	Replace phrase: "At least 55% of affordable housing delivered should be social rented, based on local need" with text: "Up to 55% of affordable housing delivered should be social rented, based on local need, to be sought and delivered by a variety of means including Registered Social Landlords, public subsidy from the Homes and Communities Agency and developer contributions in accordance with the approach set out in Appendix 1".
CC23 (SLDC63) & (SLDC6)	Para 6.13 4 th sentence	<p>Replace with: "However, there are some smaller villages and hamlets in close proximity to Milnthorpe, for which there is no regular connecting bus service."</p> <p>Add final sentence to read: "In the case of Ackenthwaite, it's very close proximity to Milnthorpe means it enjoys ready access to the town's services without relying on</p>

		public transport."
CC24 (SLDC7)	Policy CS5	Replace phrase: "At least 55% of affordable housing delivered should be social rented, based on local need" with the text: "Up to 55% of affordable housing delivered should be social rented, based on local need, to be sought and delivered by a variety of means including Registered Social Landlords, public subsidy from the Homes and Communities Agency and developer contributions in accordance with the approach set out in Appendix 1".
CC25 (SOCG9)	Policy CS6.1 para 7.6	Add para 7.6a to read: "The District Council published a final Strategic Housing Market Assessment (SHMA) in December 2009. The SHMA considers the effects of different growth scenarios on future housing requirements in the District's housing market areas. The Council will take account of the study's findings in regard to housing requirements and land supply through future reviews of the Core Strategy".
CC26 (SLDC18)	Policy CS6.1	Delete 2nd sentence in 2nd para of the policy
CC27 (SLDC19, 20 & 21)	CS6.1 Housing Split Table	<p>Delete columns 2, 3 and 15 and 16 in the Table i.e. those relating to 'Housing Stock 1991', 'Housing Stock 2009' and 'Percentage Increase 2009 – 2025'.</p> <p>Delete information relating to the individual Key and local Service Centre settlements.</p> <p>Amend table to include grouped targets and information at the overall Key and Local Service Centre level and planning permissions in a separate column.</p> <p>Delete reference to Oxenholme being classed as part of Kendal. Table 75 column titled 'settlements' should refer to Kendal only and not including Oxenholme.</p>
CC28 (SLDC22)	Policy CS6.1 text following table	Delete 1st and last bullet points in the notes supporting Table on page 75 in order to reflect changes above

		Add new bullet point to read: "Total projected dwellings 2009 – 2014 summarised the number of dwellings which will be delivered if all outstanding planning permissions are built out
CC29 (SOCG10, SLDC 64, 23 & 65)	Policy CS6.2	<p>Replace the sentence: 'All housing should be built to Lifetime Homes standard' with: "The Council will seek housing to be built to Lifetime Homes standard in accordance with its requirement at a national level through building regulations".</p> <p>Delete 3rd bullet point</p> <p>Add to end of 2nd para a new sentence to read: "The Council will liaise and negotiate with the County Council Adult Social Care Services how older persons housing needs will be accommodated using findings contained within relevant studies and reports (for example the 2009 Planning4care report)"</p> <p>Delete wording in 3rd paragraph and replace so it reads: "... explain how each of the design criteria as required at a national level through building regulations relating to Lifetime Homes standards has been satisfied in the proposal".</p>
CC30 (SLDC 8 & 66)	Policy CS6.3 1st bullet point	<p>Amend 2nd sentence to read: 'The Council may seek to require a higher percentage on individual sites, based on evidence of need and viability, through the preparation of Development Plan Documents which allocate sites'.</p> <p>Add words to end of 3rd bullet point to read "Further targets and requirements are set out in each of the Area Strategy policies C2-C5"</p>
CC31 (SLDC 24)	Para 7.17	Add new 3rd sentence to read: 'The Cumbria Gypsy and Traveller Accommodation Assessment, GTAA, (May 2008) assessed the accommodation needs for residential and transit pitches and also the number of plots required for travelling show people.'

CC32 (SLDC25 & SOCG11)	Policy CS6.5	<p>Split policy into 2 parts – (a) dealing with Gypsies and Travellers, and (b) dealing with Travelling Show People;</p> <p>Edit point 1 of each part to refer to the different groups as set out in SLDC Appendix 3</p> <p>Add additional criterion to each part to read: 'The needs of the users of the sites are accommodated'</p> <p>Add text to end of each part to read: 'Conditions will be used to control the nature and level of non-residential uses on the site'</p> <p>Delete from each part the words: 'and emerging targets in the partial review of the RSS'.</p>
CC33 (SLDC 26)	Para 7.19	At start delete words "In extreme circumstances", and replace with new wording to read "Where necessary, the Council..."
CC34 (SOCG12 & SLDC27)	Policy CS6.6	<p>In section 1 delete 50% PDL target and add text to read: 'at least 28%'</p> <p>In last bullet point of section 2 add text after 'acquiring properties' to read: 'and or land'.</p>
CC35 (SLDC67)	Para 8.5	Add text at end of para to read: 'the District Council will take account of employment land provision in the Lake District National Park in considering the amount, type and location of employment land required'
CC36 (SOCG13)	Para 8.11	Add text at end of para to read: "Allocations of new employment developments will be identified in the Allocations of Land DPD".
CC37 (SLDC28)	Policy CS7.1	In 5th para 2nd sentence delete reference to LDF and add text to read: "... should not be allocated in the Allocations of Land DPD."
CC38 (SLDC68)	Policy CS7.2	Add text at end to read: "Guidance contained within Appendix 1 of the Monitoring and Implementation Framework

		will be applied in connection to criteria and the sequential approach for identification of strategic employment sites".
CC39 (PHS3)	Policy CS7.5	Add text after 1st sentence in 2nd para to read: "Support will be given for convenience and comparison goods provision, of an appropriate scale, which aids the vitality and viability of Kendal Town Centre."
CC40 (SLDC69)	Para 8.30	In 3rd bullet point delete words 'off-shore'.
CC41 (SLDC70, SOCG28 & SLDC83))	Policy CS7.7	In 1st bullet point delete the words: 'contributing towards renewable energy generation targets in EM17 of the RSS,...' After the 1st bullet point add text to read: "The Wind Energy SPD will continue to be used in the determination of planning applications." Add bullet point between existing bullet points to read: "Supporting the development of environmental/renewable energy technology business clusters in Kendal and Ulverston, capitalising on the existing base of relevant skills and businesses"
CC42 (SLDC30, SOCG 15 & 16 & SLDC31)	Policy CS8.2	Replace 1st para as follows: "Proposals for development should be informed by, and sympathetic to, the distinctive landscape types identified in the: Cumbria Landscape Character Guidance and Toolkit Historic Landscape Character Assessment Arnside and Silverdale AONB Landscape and Seascape Assessment Features identified in relevant settlement studies and local evidence The Arnside and Silverdale AONB Management Plan In 1st of the criteria bullet points after 'Silverdale AONB add text: 'including their

		<p>settings'</p> <p>In 4th of the criteria bullet points after 'hedges' add text: 'walls, traditional buildings,'</p> <p>Edit criteria bullet point 5 to read: "...The setting of, and views into and from the AONB, the National Parks, conservation areas..."</p>
<p>CC43 (SLDC32, SOCG 17,18,19, 20, 21 SLDC33 & SOCG22)</p>	<p>Para 9.10</p>	<p>In 1st sentence after 'biodiversity' add: '(as shown in the Cumbria Biodiversity Evidence Base)....'</p> <p>Edit later text of 1st sentence to read: "...the protection and enhancement of areas designated or otherwise recognised for their biodiversity and geodiversity importance is paramount"</p> <p>At end of 1st sub-para add text: "The Monitoring and Implementation Framework (see Appendix 1) identifies the biodiversity and geodiversity resources in South Lakeland"</p> <p>Edit 1st sentence in 2nd sub-para to read: "Proposals should particularly seek to contribute towards the UK priority habitats and species in South Lakeland, and any additional Cumbria Biodiversity Action Plan species."</p> <p>Add text in 2nd sentence in 2nd sub-para after 'biodiversity or geology' to read: "...this should also take into consideration indirect effects, such as an increase in visitors, together with any proposed prevention, mitigation or compensation measures."</p> <p>Add text at end of 2nd sub-para to read, "It is also important to protect and enhance those sites, habitats and species that do not enjoy special protection (recognising that previously developed land can have biodiversity and geological value).</p> <p>Add final sub para to read: "Development likely to have an adverse effect on the integrity and conservation objectives of</p>

		<p>sites of international importance for nature conservation is unlikely to meet the requirements of the Habitats Directive and would be unlikely to be considered favourably. As part of the new national biodiversity strategy Biodiversity Action Plans and Opportunity Maps have been developed for the Northwest. These will be used along with species records, habitat inventories and wildlife designations to develop local opportunity maps and ecological frameworks to identify opportunities for biodiversity gains in South Lakeland”.</p>
<p>CC44 (SOCG23, SLDC34, SOCG 24 & 25, & SOCG20)</p>	<p>Policy CS8.4</p>	<p>Amend text in 1st bullet point to read: “Protect, enhance and restore the biodiversity and geodiversity value of land and buildings;” and delete words “and minimise fragmentation of habitats;”</p> <p>Edit 2nd bullet point with text to read, “Minimise fragmentation and maximise opportunities for restoration, enhancement and connection of natural habitats (including links to habitats outside South Lakeland);”</p> <p>Edit 3rd bullet point to read: “Incorporate beneficial biodiversity and geodiversity conservation features, including features that will help wildlife to adapt to climate change, where appropriate”</p> <p>Edit 2nd para to read: “Proposals should particularly seek to contribute towards the UK priority habitats and species in South Lakeland, and any additional Cumbria Biodiversity Action Plan species”</p> <p>Edit 3rd para to read: “Development proposals that would have a direct or indirect adverse effect on national, sub-regional, regional and local designated sites, and on non-protected sites that are shown to have geological and biodiversity value, will not be permitted unless...”</p> <p>Delete text in last sentence (now in explanatory text).</p>

<p>CC45 (SLDC35, 72 & 73)</p>	<p>Policy CS8.5</p>	<p>Add text to 4th bullet point after 'climate change,' to read: 'such as sea level rise and increased flood and storm events in determining...'</p> <p>Add text to 7th bullet point after 'Morecambe Bay Strategy' to read: '...and the Morecambe Bay European Marine Site Management Scheme and Action Plan.'</p> <p>Add to end of last bullet point: '...as set out in the current Shoreline Management Plan for the North West and North Wales'</p>
<p>CC46 (SLDC 36, 37, 38 & SOCG26)</p>	<p>Policy CS8.6</p>	<p>Add text at bullet point 3 after 'historic importance' to read: 'in order to assist in the planning of a prioritised programme of conservation management for such buildings and features'</p> <p>Add text at bullet point 5 after 'historic assets' to read: 'giving particular priority to those identified as being 'at risk''.</p> <p>Add text to end of bullet point 6 to read '...accessibility and, where opportunities exist, their use as an educational resource'.</p> <p>Add text in a new bullet point to read, "The safeguarding, and where possible enhancement, of locally important archaeological sites and features within the historic environment".</p>
<p>CC47 (SLDC75, SOCG27, SLDC74 & 39)</p>	<p>Policy CS8.7</p>	<p>Replace 1st para with: "New residential development and conversions will be required to meet the Code for Sustainable Homes as required by building regulations".</p> <p>In 4th para delete text in 1st sentence: 'contributing towards the target in RSS policy EM17'</p> <p>Delete 6th para</p>
<p>CC48 (SLDC76)</p>	<p>Para 9.33</p>	<p>Add new text to end of para to read: "The recent Cumbria Minerals Waste Development Framework Allocations of Land Preferred Options Consultation document suggests the Mechanical and Biological Treatment Plant is more likely as</p>

		it identifies site SL1A at Kendal Fell Quarry for waste treatment specifically".
CC49 (SLDC40)	Policy CS8.10	Add new text at end to read: "Designs that support and enhance local distinctiveness will be encouraged. New developments should protect and enhance key local views and features/characteristics of local importance and incorporate layouts that reinforce specific local distinctiveness"
CC50 (SLDC 41 & 42)	Policy CS9.1	Add new bullet point to read: "Tackling air pollution where necessary through Air Quality Management Plans". Add new bullet point to read: "Meeting needs and requirements associated with residential care homes, extra care housing and other types of housing for older people as identified in relevant reports and studies (for example the 2009 Planning4care Report)"
CC51 (SLDC43)	Para 10.5	Add text on page 108 in box relating to National and Regional Policy Context to read: "Circular 5/2005" Replace para 10.5 with new text to read: "The Council will apply developer contributions in the context of the provisions set out within Planning Circular 05/2005. An SPD relating to Planning Obligations will be produced by the Council in the future."
CC52 (SOCG29)	Para 10.6	Add new para 10.6 to read: "In rural locations there is a need to improve accessibility to public/sustainable transport measures. Development should provide a contribution towards improved public/sustainable transport measures or to support initiatives such as Rural Wheels in order to offset the environmental impact of development".
CC53 (SLDC44 & SOCG30)	Policy CS9.2	Replace 1st para with text to read: "In accordance with the provisions set out within Planning Circular 05/2005, the Council will require new developments to secure improvements which are necessary to make the development acceptable by planning condition or obligations, and

		<p>these must be phased so as to be in place in accordance with any agreed time frame prior to the occupation of an agreed number of units".</p> <p>Add text to end of 1st bullet point to read, '...and the securing of Travel Plans'.</p>
CC54 (SLDC46 & SLDC9)	Para 11.5	<p>Add new text in 1st sentence after 'route hierarchy' to read: '... (regionally significant roads) and RSS Policy RTc. Proposals...</p> <p>Add text at end of 2nd sentence to read: 'and strategic employment sites'.</p>
CC55 (SLDC 47, SOCG31, SLDC48)	Policy CS10.2	<p>In the last bullet point delete wording 'for non-residential schemes'.</p> <p>Add new bullet point to read: "The proposal incorporates parking standards that are in accordance with any adopted and emerging sub-regional and/or local policy and guidance"</p> <p>Add new bullet point to read: "Thresholds identified in National guidelines and any new regional and/or local guidelines relating to when Travel Assessments and Travel Plans are required"</p>
CC56 (SLDC79 & SOCG32)	Appendix D Monitoring Framework various pages 134-143	<p>Amend text re Lifetime Homes Standards and Code for Sustainable Development to give consistency with national target requirements and earlier policy changes. See Council's schedule for full details (ED47)</p> <p>On p 137 delete 50% and replace with 28% to reflect amended pdl target from Policy CS1.2 (<i>et seq</i>)</p>
CC57 (SLDC49)	Appendix D Implementation Plan page 145	Add bullet point to read: "AONB Management Plan and Action Plan" to 'Implementation Mechanism' column for policy CS1.1
CC58 (SLDC50)	Appendix D Implementation Plan page 146	Add new text after 4th bullet point relating to policy CS2 Kendal Area Strategy CS2 to read "Air Quality Management Plans
CC59 (SLDC77)	Appendix D Implementation	Add new bullet point relating to CS6.1 to read: "Potential for forum with

	Plan page 147	housebuilders
CC60 (SLDC51)	Appendix D Implementation Plan page 148	Add new bullet point relating to policy CS6.2 to read: "Local Studies and Reports such as the 2009 Planning4care report to be used to inform decision making regarding meeting older persons' housing needs"
CC61 (SLDC78)	Appendix D Implementation Plan page 151	Add new bullet point in the Implementation Mechanism to CS8.5 to read: "Working With Morecambe Bay Partnership". Add new text in responsible agencies cell: "Morecambe Bay Partnership".
C62 SLDC80)	Appendix D Implementation Plan page 152	Delete text in paragraph 4.3
CC63 (SOCG33)	Appendix D Implementation Plan page 153	Add new paragraph 6.3 to read, "Where evidence through SHMA suggests significant change relating to housing need across the district this will be taken into consideration in decisions regarding the management of housing land supply in the future"
CC64 (SLDC52)	Appendix D Implementation Plan page 158 <i>et seq</i>	Replace 1st table in section 7.4.0 with 1st table in Appendix 1 and accompanying text. Replace para 7.4.1 with examples 1 & 2 and accompanying text in Appendix 1.
CC65 (SLDC53 & SLDC54)	Appendix D Implementation Plan page 162-3	Add text to sentence ending '...in the Council's Strategic Housing Market Assessment' to read: ", however households able to afford the open market price of an affordable property (using the calculation above) will not qualify (see note below)." Add the words "as lower quartile prices" before the phrase 'in the Council's Strategic Housing Market Assessment'. Add additional sentence at the end of paragraph 7.5.3 to read: "Note: In some cases there may be housing schemes with similar properties being sold at different

		affordable prices. In such cases applicants will be eligible for the price suited to their financial circumstances."
CC66 (SLDC55)	Appendix D Implementation Plan page 164	Add new section 8.0 to Core Strategy's Appendix D, as set out as Appendix 2 to Council's schedule explaining implementation of policy CS7.2 re Employment Land
CC67 (SLDC56)	Appendix I (Saved & Extended Policies in the S Lakeland Local Plan & Cumbria Joint Structure Plan)	<p>Add text in para 1.2.3 as new sentence to read: "With regard to Local Plan policy H5 this policy will only in part be replaced by the Core Strategy as it contains spatial elements that will be replaced by other DPD's notably the Allocations of Land DPD.</p> <p>Policy H5</p> <p>Core Strategy policy CS1.2 proposes the removal of settlement boundaries in settlements not classified as Principal, Key or Local Service Centre. As a consequence the boundaries of the following settlements listed in policy H5 will be removed once the Core Strategy is adopted:</p> <p>Ackenthwaite, Barbon, Bardsea, Baycliff, Beetham, Brigsteer, Carr Bank, Casterton, Endmoor (Low Park), Gatebeck, Gleaston, Heversham, Hutton Roof, Leasgill, Leece, Loppergarth, Newbiggin, Old Hutton, Old Hutton (Middleshaw), Old Hutton (Bridge End), Ravenstown, Scales, Sedgwick, Slackhead and Stainton-with-Adgarley.</p> <p>For all other settlements listed in policy H5 the boundaries will be saved until replaced by the Allocations of Land DPD.</p>
CC68 (SLDC57 & SLDC58)	Appendix I (Saved & Extended Policies in the S Lakeland Local Plan & Cumbria Joint Structure Plan)	<p>Add text in para 1.2.3 as new sentence to read: "With regard to Local Plan policy C2 this policy will only in part be replaced by the Core Strategy as it contains spatial elements that will be replaced by other DPD's notably the Allocations of Land DPD.</p> <p>Policy C2</p> <p>Core Strategy policy CS8.2 sets out the approach to protecting and enhancing landscape and settlement character,</p>

		<p>including the retention of green gaps based on fulfilling specific criteria.</p> <p>These criteria in CS8.2 replace those previously contained within Local Plan Policy C2.</p> <p>The existing Local Plan Green Gap designations are considered to be protected by Core Strategy policy CS8.2 (fulfilling, as they do, at least some of its criteria). Thus their designation will be maintained pending review through the Allocations of Land DPD."</p> <p>In following Saved Policy etc table in H5 reference 3rd column after 'CS1.2 sets out a settlement hierarchy and related levels of development' add text: "As explained in paragraph 1.2.3, this policy will only in part be replaced by CS1.2. The policy will no longer apply to those settlements listed in paragraph 1.2.3. For all other settlements listed in policy H5 the boundaries will be saved until replaced by the Allocations of Land DPD".</p>
CC70 (SLDC59)	Appendix I Table under para 1.2.3 re policy C2	Add text in 3 rd column under sub-heading of environment and conservation relating to policy C2 to read: "The existing Local Plan Green Gap designations are considered to be protected by Core Strategy policy CS8.2 (fulfilling, as they do, at least some of its criteria). Thus their designation will be maintained pending review through the Allocations of Land DPD"
CC71 (SLDC 81)	Appendix L page 195	Delete paras 1.3 and 1.4. Changes to be incorporated into Appendix 1 Monitoring and Implementation Framework. The Housing Trajectory will follow on from Paragraph 4.4 of Appendix 1 Monitoring and Implementation Framework.
CC72 (SLDC 82)	Appendix L page 196	Delete table and replace with table as shown in Appendix 4 to Council's schedule (ED47)

APPENDIX B – MINOR EDITORIAL CHANGES SUGGESTED BY THE COUNCIL

The Council proposed several minor changes that do not affect the soundness of the document and hence are not dealt with in the report. The Minor Editorial and other presentational Changes proposed by the Council in ED47.1 are listed in plan order in the Schedule below. As these changes correct minor errors and generally improve the DPD I endorse them. The numbers in column 1 refer to the Council's Final Schedule of Proposed Changes (ED47).

Council's Minor Edit Change No.	Policy or section	Change
SLDC10	Front cover	Add to the front cover the timescale of the Core Strategy this being 2010-2025
ME27	Forward	Amend wording to read: "Foreword" Add picture/signature from portfolio holder
ME28	Contents Page ii	Amend wording to read: "Travellers"
ME29	Figure 1 Page 1	Add numbered roads to the map
ME23	Paragraph 1.3	Correct footnote reference in first bullet point to "1"
ME105	Paragraph 1.4	Amend 1 st sentence to read: "The total population of the area of South Lakeland District is around 105,000..."
ME1	Figure 5 Bus routes	Add text on plan to show location of Grange-over-Sands, Milnthorpe and Kirkby Lonsdale
ME30	Vision para 1.37	Amend wording in second sub-paragraph of 1.37 to read: "Lake District"
ME31	Vision para on page 11	Amend wording "schedules ancient monuments" to read: "scheduled ancient monuments".
ME32	Vision top right green boxed text	Delete full stop in the middle of 3 rd sentence between words 'cycleways' and 'serving'.
ME2	Policy CS1.2	Amend first sentence, replace word 'designed' to read: "designated" as in 'designated Local Service Centres'.
ME3	Policy CS1.2	In the settlement hierarchy table add a comma between Natland and Swarthmoor so it reads: "...Natland, Swarthmoor...."
ME4	Policy CS1.2 3 rd	Amend text to read: "In order to adapt to

	para	changing circumstances...."
ME5	Policy CS1.2 3 rd para	Amend text to read: "Any changes to the apportionment will be clearly evidenced and monitored through the Annual Monitoring Report".
ME33	Para 2.23	Amend wording in the first sentence to read: "previously developed land".
ME34	Para 2.24	Amend wording in the second sentence to read: "...and in light of..."
ME35	Key Diagram	Amend text in the key to read "Lancaster Canal".
ME24	Key Diagram	Add rail link to Barrow in Furness
ME37	P.28	Amend text in the second sentence, word 'mediaeval', to read: "medieval".
ME38	Policy CS2	Amend header to the policy to read: "Kendal Strategy".
ME39	Policy CS2, para 3.46	At start of 1 st sentence add wording to read: "An appropriate assessment has been undertaken on the Core Strategy to assess the..." etc...
ME40	P.39 Section 4	Add text to the end of header to read: "Section 4 – Spatial Strategy for Ulverston and Furness"
ME41	P.41 para 4.14	Amend text in 1 st and 2 nd sentences so word 'mediaeval' reads: "medieval"
ME42	P.42 para 4.18	Delete: 'A591' in second sentence and replace with 'A590'.
ME43	P.47	At end of para 4.29 replace reference to CS8.3 with CS6.3.
ME44	P.48	Amend text in 4 th sentence of para 4.37 so 'encourage' reads: 'encouraged'.
ME45	Para 4.38	Amend word in 1 st sentence so 'mediaeval' reads 'medieval'.
ME46	Para 5.2	Amend break in the word 'the', by closing the space.
ME47	Para 5.13	Amend text in final sentence to read: "...rebuilding footbridges and developing new links will make a real difference to how..."
ME48	Para 5.20	Amend word 'mediaeval' to read: 'medieval'.
ME49	Policy CS4	Amend wording in the second bullet under the title 'Access' to read: " Grange-over-Sands to cross the..."
ME50	Para 5.28	Delete text in the first part of the second bullet point so it reads: "Starting to re-use the Lido buildings etc...."
ME52	Para 5.33	In 3 rd sentence amend text so it reads: 'solicitors' offices'

ME53	Para 5.36	In 2 nd sentence amend text to read: 'environmental designations'.
ME54	Para 6.2	In 3 rd bullet point between words 'Grayrigg' and 'Hutton Roof' add new text to read: 'Heversham and Leasgill' and between 'Hutton Roof' and 'Old Hutton' add new text to read: 'New Hutton'.
ME55	Para 6.7	Amend text of 1 st sentence to read: "...Kirkby Lonsdale in terms of annual spend".
ME56	Para 6.13	4 th sentence delete words: "Heversham and Leasgill"
ME57	Para 6.15	Amend word in last sentence so 'mediaeval' reads: 'medieval'
ME58	Para 6.18	Amend name in 3 rd sentence to read: 'Arnside Knott'
ME59	Para 6.20	Amend text of 2 nd sentence so words 'flood zone' read: 'flood risk'
ME60	Policy CS5	Amend text of 3 rd bullet point relating to smaller villages & hamlets so 'Gatebank' reads: 'Gatebeck'
ME62	Para 6.29	Amend text so it reads: "... support the vitality and viability"...
ME63	Para 6.32	Amend text in the paragraph so it reads: "...internationally important environmental designations..."
ME64	Para 7.1	Amend text in 3 rd sentence so it reads: "The Core Strategy covers the period..."
ME65	Para 7.2	Amend text in 1 st sentence to read: "... which is less than the..."
ME68	Policy CS6.2	Amend text in 1 st sentence second bullet point so it reads: "...All new housing should be easily adaptable for everyone..."
ME90	Para 7.15	In first sentence replace 'mix' with 'mixed' and remove word 'use'
ME70	Policy CS6.5	Amend para 7.17 header to read: 'Gypsies and travellers', and references to gypsies to be capitalised, ie 'Gypsies'
ME71	Policy CS6.5	Amend text in 1 st sentence of para 7.17 to read: "...It is important that the Core Strategy meets the needs..."
ME73	Policy CS7	In 1 st sentence of para 8.1 amend "see table below" to read: "see table overleaf".
ME12	Policy CS7 para 8.3	Amend text in last sentence to read: "...as fully serviced and actively marketed, or likely to be serviced in the next three years".
ME74	Policy CS7.1	Amend text in para 8.11 to read: "... identified on the proposal map."
ME13	Policy CS7.2	Amend footnote numbering "1" to read: "3"

ME25	Policy CS7.2	Delete footnote 4 reference to '8+ hectares', and replace with: '5+ hectares'
ME75 & ME103	Para 8.21	Amend text of 1 st sentence to read: "... and other small-scale economic uses, including village pubs, to rural communities and seeks to take this into account when assessing development proposals..."
ME76	Policy CS7.4	Amend text of 1 st sentence to read: "...Support will be given to..."
ME77	Policy CS7.4	In 4 th last bullet point amend text to read: "The buildings are structurally..."
ME78	Policy CS7.5	In the last bullet point amend text to read: "...a strong social identity..."
ME79	Policy CS7.6	Amend text in 1 st sentence of 3 rd para to read: "...where the environment and..."
ME14	Policy CS7.6	Amend text in 2 nd sentence of 3 rd para to read: "...then it will be permitted only where it relies on a specific geographical resource..."
ME15	Policy CS8.1	Amend text in final bullet point to read: "Ensure the protection and enhancement of watercourses and..."
ME80 & ME92	Policy 8.3b standards table	Amend text in the header column titles to read: ""Parks and Gardens" and "Natural and Semi Natural Greenspace" and "Amenity Greenspace" and "Provision for children and young people" Delete Milnthorpe playing pitch figure of 1.95 hectares and replace with 3.37 hectares
ME81	Policy CS8.4	Amend text in 2 nd last paragraph to read: "...enhance biodiversity or geodiversity..."
ME26	Policy CS8.5	In 6 th bullet point, make text from the 2 nd sentence onwards a separate bullet point.
ME104	Para 9.29	Amend word 'there' to read: 'their'
ME82	Policy CS8.9	Amend text in 2 nd paragraph to read: "... including the required mechanical and..."
ME18	Appendix D p.134	Delete reference to 50% target for total amount of additional employment floorspace on previously developed land.
ME83	Appendix D p.134	Amend text in 3 rd objective to read: "...but also communities within the parks".
ME19	Appendix D P.139	RE final column target for change in areas of biodiversity importance: Amend text to read: "Annual Increase"
ME20	Appendix D	Add text in 'Implementation Mechanism' section re. policy CS6.1 to read: "The Strategic Housing Market Assessment" Add text in 'Implementation Mechanism'

		section re. policy CS6.3 to read: "The Strategic Market Housing Assessment"
ME85	Appendix D	In 1st column of table relating to CS6.4 delete "Community Led Affordable Housing in Smaller Rural Settlements" and replace with "Rural Exception Policy"
ME86	Appendix D	In 1st column of table relating to Policy CS6.5A&B Accommodation for Gypsies and Travellers, add to the end: " and Travelling showpeople"
ME88	Appendix D	Add new text in policy column to relating to CS8.4 to read: "Biodiversity and Geodiversity"
ME87	Appendix D	Add a new row after CS8.9 and title it "CS8.10 Design". In the Implementation Mechanisms add text to read: "Allocations of Land DPD, Development Management Decisions, Planning and Design Guidance". In responsible agencies add text to read "Landowners/Developers, SLDC and CCC"
ME89	Appendix D Section 4	In 2nd sentence of para 4.4 amend text in brackets to read: "see overleaf"
ME93	Appendix D para 7.3.5	Amend 2 nd sentence to read: '...Upper Kent and South Westmorland local area partnership areas...'
ME94	Appendix D table p.156	Amend 2 nd column header by omitting 'Key and Local Service Centres' and replacing with: 'Parishes'
ME95	Appendix D table p.156	Fifth row 1 st column delete: 'Kent Estuary' and replace with: 'South Westmorland'
ME96	Appendix D table p.158	Add title: 'Table 1'
ME97	Appendix D p.158	In sub para after Table 1 edit 2 nd sentence to read: 'The most simple way would be to use the Affordable Housing Contribution figures in Table 1, so using Example 1....'
ME98	Appendix D p.158 Example 2	Amend final para reading: 'Reduce the overall number of affordable homes...' by indenting and inserting number '2'
ME99	Appendix D para 7.4.2	Edit 2 nd sentence to read: 'For further information contact: the Strategic Housing and Enabling Officer on 1539 717455 (housingstrategy@southlakeland.gov.uk)
ME100 & ME101	Appendix D paras 7.5.1 & 7.5.2	Replace all references to the 'Community and Housing Manager' with 'Affordable Housing Officer'
ME102	Appendix D para	In contact details at end edit to read: 'Affordable Housing Officer on 01539

	7.5.4	717333 (housingstrategy@southlakeland.gov.uk)
ME21	Appendix D Section 9	<p>Add new sub-heading on page 164 titled "South Lakeland Biodiversity and Geodiversity Resources".</p> <p>Add text to read: "The areas and features within South Lakeland which are formally identified as being of national and international importance are:</p> <ul style="list-style-type: none"> • Areas of Outstanding Natural Beauty – Arnside and Silverdale; • Ramsar sites and/or Special Areas of Conservation and Special Protection Areas – Duddon Estuary; Duddon Mosses; Morecambe Bay; Morecambe Bay Pavements; River Kent and Roundsea Wood and Mosses; • National Nature Reserves; Sites of Special Scientific Interest; statutorily protected wildlife species; Limestone Pavements protected by Orders; nationally important archaeological sites whether Scheduled or not; Registered Parks and Gardens of Historic Interest; and listed buildings. <p>Wildlife, geological, geomorphological landscape and historic environment areas and features which are of particular County importance, or which make a contribution to biodiversity and geological conservation include:-</p> <ul style="list-style-type: none"> • Local Nature Reserves; • Local Sites (these are County Wildlife Sites and Regionally Important Geological and Geomorphological Sites); • Species and habitats listed as of principal importance for the conservation of biodiversity in the UK (Section 74 of the CROW Act 2000); • UK list of priority habitats and species; • Cumbria Biodiversity Action Plan species and additional species of conservation importance for the North West Region that occur within Cumbria (to be reviewed); • Cumbria Geodiversity Action Plan sites; • Listed Buildings, Conservation Areas and their settings; the settings of the Lake District and Yorkshire Dales National Parks, of the Areas of Outstanding Natural Beauty, of Registered Historic Parks and Gardens and of Scheduled Ancient

		<p>Monuments; Add new text to read: "</p> <ul style="list-style-type: none"> • Distinctive landscape types identified in the Cumbria Landscape Character Guidance and Toolkit, Historic Landscape Character Assessment, Arnside and Silverdale AONB Landscape and Seascape Assessment, features identified in relevant settlement studies and local evidence and the Arnside and Silverdale AONB Management Plan which relate to landscape features of major importance for wildlife that are essential for migration, dispersal and genetic exchange and which encourage the protection, conservation and expansion of the general ecological fabric; lakes, tarns and rivers."
ME22	Appendix E	<p>Add text to read: "RES - A former regional strategy which provided and set a ten year blueprint to improve the region's economy. It set out a plan for the North West of England to become a world leader in transforming its economy"</p>

APPENDIX C - CHANGES THE INSPECTOR CONCLUDES ARE NECESSARY TO MAKE THE PLAN SOUND

These changes are required to make the DPD sound. They were advertised and, at the Inspector's request, the Council undertook a review of its Sustainability Appraisal to confirm that none would have an adverse impact.

'IC' stands for 'Inspector Change'.

Inspector Change No.	Policy, Para or Page No	Change
IC1	Policy CS2 para 3.32 Kendal	In justification text in relation to Kendal Canal Head Area Action Plan add bullet point in para 3.32 to read: "The potential provision of an appropriate scale of retail development".
IC2	Policy CS3.1 Ulverston & Furness Area	Edit 'Housing Split' table so as to reduce first 5 years of housing target for Ulverston and Furness (2009-2014) by 10% of balance remaining (ie 1,470 x 5% = 147 dwellings) and re-distribute 'lost' 147 dwellings equally between 2nd and 3rd five year periods (73 dwellings to 2014-19 and 74 dwellings to 2019-25), and keep local needs under review.
IC3	Policy CS6.3 Local Occupancy	Delete penultimate bullet point relating to local occupancy housing and all associated supporting text and explanatory appendices including from sub-area strategies as set out below:

IC3.1 p.ii (Contents)	Delete reference to Local Occupancy Housing
IC3.2 p.8 (Key Issues) Bullet 2, Point 2	Delete: "Making provision for Local Occupancy Housing"
IC3.3 p.13 (Strategic Objectives) First text box, Bullet 5	Delete: "Requiring some new housing developments to make provision for local occupancy housing;"
IC3.4 Policy CS3.1 (Ulverston & Furness) Housing subheading, 4 th bullet	Delete: "Ensure that, outside Ulverston, new development is restricted by local occupancy conditions (see CS8.3).
IC3.5 Para 4.29	Delete: "Evidence regarding the supply of housing in the Furness Peninsula (outside Ulverston) and demand from both people moving into the area and local households in the emerging Strategic Housing Market Assessment supports the requirement to restrict new development in the area to local people, to ensure that they are able to access the housing market (see CS8.3)".
IC3.6 Policy CS4	Delete: "Outside Grange-over-Sands, new development

(Cartmel Peninsula) Housing subheading, 3 rd bullet	should be restricted by local occupancy conditions (see CS8.3)."
IC3.7 Para 5.32	Delete: "Evidence regarding the supply of housing in the Cartmel Peninsula (outside Grange) and demand from both people moving into the area and local households in the emerging Strategic Housing Market Assessment supports the requirement to restrict new development in the area to local people, to ensure that they are able to access the housing market (see CS8.3)".
IC3.8 Policy CS5 (The East including Milnthorpe and Kirkby Lonsdale) – Housing subheading 4 th bullet	Delete: "Outside Milnthorpe, new development should be restricted by local occupancy conditions (see CS8.3).
IC3.9 Para 6.27	Delete: "Evidence regarding the supply of housing in the area (outside Milnthorpe) and demand from both people moving into the area and local households in the emerging Strategic Housing Market Assessment supports the requirement to restrict new development in the area to local people, to ensure that they are able to access the housing market (see CS8.3)".
IC3.10 Para 7.10	Delete: "and local occupancy" from title
IC3.11 Para 7.14 2 nd sentence	Delete: "To ensure that local people who would not qualify for affordable housing can access the housing market, and further to requiring an affordable housing contribution from new developments, the occupancy of a proportion of new housing will be restricted to people with a local connection in areas of identified need".
IC3.12 Policy CS6.3	<p>Title – Delete: "/local occupancy housing"</p> <p>Delete last two bullet points from the policy:</p> <ul style="list-style-type: none"> ● In addition to the affordable housing requirements above, on all residential developments of three or more dwellings across the district outside the Key Service Centres of Kendal, Ulverston, Milnthorpe and Grange-over-Sands, 35% of the total number of dwellings proposed should be for local occupancy. Schemes for one or two dwellings should be for local occupancy; ● Eligibility for local occupancy housing would extent to the District and surrounding areas as defined in the monitoring and implementation framework. <p>Fourth paragraph delete words: "/local occupancy" so it reads "... A lower requirement for affordable housing will be acceptable..."</p>

	Delete final sentence in the policy: "The ongoing requirements for local occupancy restrictions is dependent on the continued demonstration of evidence of need (Strategic Housing Market Assessment)"
IC3.13 Appendix D p.137	Monitoring and Implementation Framework Housing Objectives table: Delete third row relating to Local Occupancy Housing
IC3.14 Appendix D p.148 Implementation Plan	Second row relating to Policy CS6.3, left column Delete reference to Local Occupancy housing
IC3.15 Appendix D p.153 paras 7.0 & 7.1	Implementing Policy CS6.3 - Heading Amend title so it reads: "Implementing Policy CS6.3 - Provision of Affordable Housing" Delete first two bullet points: Application of the Local Occupancy restriction Definition of Local Occupancy
IC3.16 Appendix D p.154 Paras 7.2.1-4	Delete paragraphs 7.2.1 - 7.2.4 relating to Local Occupancy housing
IC3.17 Appendix D p.159 Implementing Policy CS6.1 Para 7.4.3	Implementing Policy CS6.1 - Heading Amend title so it reads: "Affordable Housing Requirements" Delete text in the sentence relating to "local occupancy dwellings" so it reads: "...the number of affordable dwellings which will be..." Delete 3rd column of the table in para 7.4.3

APPENDIX D - COUNCIL'S EDITORIAL CHANGES TO REFLECT RSS REVOCATION

Policy, or Para or number	Change
Policy CS1.1	Delete existing Bullet 8 and replace with; 'Development should accord with the following sequential approach: <ul style="list-style-type: none"> • first, using existing buildings (including conversion) within settlements, and previously developed land within settlements; • second, using other suitable infill opportunities within settlements; • third, the development of other land where this is well located in relation to housing, jobs, other services and infrastructure.'
Para 2.2	Add additional paragraph after Para 2.2: 'At the time of adoption, the Secretary of State had recently announced his intention to revoke Regional Strategies. Now that the Regional Strategy is revoked, the principles for defining settlement hierarchies are no longer part of the Development Plan. However, the Council remains of the view that these are soundly based and, having regard to local circumstances, form a rational basis for the definition of Principal Service Centres, Key Service Centres and Local Service Centres in the Core Strategy.'
Para 7.1	Add additional paragraph before Para 7.1: 'At the time of adoption, the Secretary of State had recently announced his intention to revoke Regional Strategies. Now that the Regional Strategy is revoked, its dwelling completion targets are no longer part of the Development Plan. However, the Council remains of the view that these are soundly based and, having regard to clear affordable housing needs identified in the Strategic Housing Market Assessment, environmental capacity and deliverability constraints, that they remain a sound basis for the delivery of new housing in South Lakeland District.'
CS6.1	In 1 st line delete: 'in accordance with the Regional Spatial Strategy for the North West'; In last para 1 st bullet delete 'RSS;' and replace with 'CS1.1;'
CS6.3	In 1 st sentence delete: 'and achieve housing requirements in the RSS;'
Para 7.17	Delete 4 th sentence: 'The partial review of the Regional Spatial Strategy will include targets for the provision of Gypsies, travellers and travelling show people'.
Paras 8.3 & 8.4	In para 8.3 insert: 'former' before: 'RSS'; In para 8.4 delete: 'The RSS advises that the pattern and scale of provision of allocated employment land should be determined by employment land reviews'.
Para 8.24	Delete sentence: 'Kendal is identified in the RSS as key regional

	retail centre'.
Policy CS7.7	In bullet 1 delete: 'contributing towards renewable energy generation targets in EM17 of the RSS'
Policy CS8.7 4 th para	In 1 st sentence delete words: 'contributing to the target in RSS policy EM17'
Para 9.10	Additional text proposed in Change SOCG22: Delete 'Work is progressing in relation to meeting the requirements of RSS Policy EM1(b)'
Para 9.26	Delete Para 9.26
Text boxes	Text boxes on Pages 21, 31, 46, 59, 69, 89, 101, 114, 117 Delete references to RSS policies throughout. Delete references to regional context in sub-headings. Where text boxes only contain RSS policies, delete text box
Para 11.5 as amended by SLDC46	Delete 'and RSS Policy RTc'
Key Diagram	Delete: 'RSS Policy RTc Diagram 3 from Proposed Change SLDC16;
Glossary	p.167 Explanation of Brownfield Land (previously developed land) - add: 'Domestic gardens are not classified as previously developed land.' p.174 Explanation of Department of Communities and Local Government - delete: 'It is also the lead sponsor for the Government Offices for the Regions.' p.175 Explanation of Greenfield Land/Site – add: 'Domestic gardens are not classified as previously developed land.' p.177 Explanation of Regional Spatial Strategy (RSS) – amend title to read: 'Regional Spatial Strategy (RSS) (Now Revoked)'. In 2 nd sentence replace 'identifies' with 'identified'

APPENDIX E – Council's Minor Consequential Changes

These minor consequential changes to the Submission Core Strategy and Appendices were suggested by the Council to simplify and streamline its structure and to clarify and reflect the document's adoption as compared to language and content more appropriate to the submission stage. None of the changes alter the thrust of the policies and are endorsed in the interests of clarity.

Foreword

CSQ1 Amend title of page 1 to read "Foreword" and delete text except paragraphs 1 and 2 on page 1.

CSQ2 Add new additional text into the Foreword to read:

The Core Strategy is a document which forms part of the South Lakeland Local Development Framework (LDF). The LDF is a series of documents which will eventually replace the South Lakeland Local Plan that was adopted in 1997 and the Alterations to the Local Plan adopted in 2006. The LDF will consider how the District (outside the two National Parks) will develop over the next fifteen years and will form part of the statutory Development Plan for the District.

The Core Strategy does not set out site-specific proposals or allocations; rather it looks at the broad locations for delivering new development such as for housing, employment, transport, retail, public services et cetera.

The delivery of the Core Strategy will require a partnership approach. It involves other organisations and groups who will work within the framework of their own strategies and plans as well as the spatial plan for the District – the LDF

Evidence of how well the policies in the Core Strategy are being achieved against clear targets set out within the Monitoring and Implementation Framework is highlighted in the Annual Monitoring Report.

The Core Strategy has resulted in some minor changes needing to be made to the 2006 Local Plan Proposals Map. These changes relate to the inclusion of an inset map showing the boundary of the Kendal Canal Head Area Action Plan as well as the removal of settlement boundaries relating to those settlements not identified as a Principal, Key or Local Service Centre. Further amendments to the Proposals Map will be required when other Development Plan Documents are published, primarily the Allocations of Land DPD.

CSQ3 Delete Appendix A of Submission Core Strategy Appendices (Background Information)

CSQ4 Delete Appendix B of Submission Core Strategy Appendices (Contextual Influences)

CSQ5 Delete Appendix C of Submission Core Strategy Appendices (Evidence Base)

CSQ6 Add an Appendix 1 to the Main Document with the following title:

APPENDIX 1 Monitoring and Implementation Framework

Appendix 1 should include text in Appendix D of the Submission Core Strategy.

Appendix 1 should include text in Appendix L of the Submission Core Strategy apart from existing text in paragraphs 1.3 and 1.4 which are to be deleted and the replacement of table in page 196 with new table.

CSQ7 Add an Appendix 2 to the Main Document with the following title:

APPENDIX 2 Saved and Extended Policies in the South Lakeland Local Plan and Cumbria Joint Structure Plan

Appendix 2 should include text in Appendix I of the Submission Core Strategy.

CSQ8 Add an Appendix 3 to the Main Document with the following title:

APPENDIX 3 Glossary

Appendix 3 should include text in Appendix E of the Submission Core Strategy with text in smaller font size.

CSQ9 Delete Appendix F of the Submission Core Strategy

CSQ10 Delete Appendix G of the Submission Core Strategy

CSQ11 Delete Appendix H of the Submission Core Strategy

CSQ12 Delete Appendix J of the Submission Core Strategy

CSQ13 Delete Appendix K of the Submission Core Strategy

Other consequential changes resulting from the incorporation of the Appendices:

Contents Page and Appendices – These will need to be amended to reflect incorporation of suggested changes and consequential changes.

CSQ14 Para 2.31 – Change reference to Appendix D to read Appendix 1

CSQ15 Para 7.5 – Change reference to Appendix D to read Appendix 1

CSQ16 Para 2.22 – Change reference to Appendix D to read Appendix 1

CSQ17 Main Policy CS6.3 at the end of the last sentence in the third paragraph add text: '(Appendix 1)'.