The Chairman would like to invite all members to a presentation by Nelson’s Journey (his chosen charity for the year) at 7.00pm in the ancillary area.

Group Meetings

Conservatives:  
Cavell & Colman Rooms  6.00 pm

Liberal Democrats:  
Blomefield Room  6.30 pm

Contact
Claire White  tel (01508) 533669
South Norfolk District Council  
Swan Lane  
Long Stratton Norwich  
NR15 2XE

If you have any special requirements in order to attend this meeting, please let us know in advance.

Large print version can be made available.
A G E N D A

1. Apologies for absence;

2. Urgent Items

   Any items of business which the Chairman decides should be considered as matters of urgency pursuant to Section 100 B (4) (b) of the Local Government Act, 1972; [Urgent business may only be taken if, "by reason of special circumstances" (which will be recorded in the minutes), the Chairman of the meeting is of the opinion that the item should be considered as a matter of urgency.]

3. To Receive Declarations of Interest from Members;
   (Please see guidance form and flow chart attached – page 6)

4. To confirm the minutes of the meeting of the Council held on Monday 23 September 2013 ;
   (attached – page 8)

5. Chairman's Announcements;
   (engagements attached – page 20)

6. To consider any petitions received under Section I of the “Rights of the Public at Meetings”
7. Notice of Motions:

(a) Cllrs C Kemp and G Wheatley

South Norfolk District Council applauds the initiative and application of Cringleford Parish Council in producing a Neighbourhood Development Plan that sets out the Parish's aspirations and objectives for their community over the intended lifetime of the Plan. Noting that the final stage of this process is the consideration of the Plan in a Parish referendum, this Council urges all electors in Cringleford to participate in that referendum early in 2014.

Cllrs C J Kemp and G S Wheatley.

(b) Cllr J Savage

This Council regrets that the Government formula for Local Government funding support allocates urban local authorities 50 per cent more funding per head of population than for rural authorities, despite the well-known facts of the extra cost of delivering services in rural areas and that average incomes are lower in rural areas. Accordingly, this Council urges the Government to move toward reducing this imbalance in the funding it offers to Local Government and instructs the Chief Executive to inform all three MPs with South Norfolk constituencies and the Department of Communities and Local Government of the terms of this resolution.

Cllr J Savage

8. Recommendations from the Cabinet;

PLEASE BRING YOUR CABINET PAPERS FOR THE MEETINGS HELD ON 28 OCTOBER AND 2 DECEMBER 2013

(a) Capital and Treasury Report Quarter 2 2013/14;

(page 33 of the Cabinet agenda 28 October 2013)

<table>
<thead>
<tr>
<th>RESOLVED:</th>
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<td>1. TO RECOMMEND THAT COUNCIL:</td>
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<tr>
<td>a) Approves the 2013/14 prudential indicators for the quarter.</td>
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<td>b) Notes the treasury activity in the quarter and that it complies with the agreed strategy.</td>
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<td>c) Approves the increases in the counterparty limits for UK clearing banks as proposed in 7.3.</td>
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<tr>
<td>d) Notes the breach in the prudential indicators relating to external debt set out in 8.2.</td>
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(b) Business Rate Pooling;

(page 49 of the Cabinet agenda 28 October 2013)

| RESOLVED: | TO RECOMMEND THAT COUNCIL agrees, subject to the negotiation of the detailed financial and governance arrangements, that the Deputy Chief Executive, in consultation with the Head of Finance and the Leader of the Council, be given delegated authority to enter the Council into a business rates pooling arrangement for Norfolk with Norfolk County Council and other Norfolk district councils. |

(c) Development Management – Proposed revised Scheme of Delegation;

(page 54 of the Cabinet agenda 28 October 2013)

NOTE: The proposed changes to the Scheme of delegation following Cabinet's recommendations are detailed in the Monitoring Officer's report at agenda item 10

| RESOLVED: | TO RECOMMEND THAT COUNCIL approves the proposed Revised Scheme of Delegation (with an implementation date of 1 January 2014), subject to:
| a) the clause referring to the potential to generate employment being retained; |
| b) The word “significant” in the penultimate sentence of 3.1 is replaced with a more appropriate form of words. |

(d) Council Tax Support Scheme;

(page 68 of the Cabinet agenda 2 December 2013)

(the proposed South Norfolk Council Support Scheme for 2014/15 is detailed on the website)

The recommendation from the Cabinet meeting held 2 December will follow shortly.

9. Adoption of the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland part of the Norwich Policy Area Local Plan;

(report attached – page 22)

(Appendices 1 and 2 are available to view electronically on the Council’s website)

10. Monitoring Officer Report;

(report attached – page 29)
11. Chairmen’s Reports;

To receive/hear reports and to take questions from Councillors and the public.

Note: [Time allocated to be at the discretion of the Chairman. No notice is required of questions, however it may be necessary for written answers to be provided where an immediate response cannot be supplied]. If members choose to submit questions in writing in advance, they will be circulated before the meeting.


(Report attached – page 37)

Questions to the Leader and other Cabinet members as follows:

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<table>
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<tbody>
<tr>
<td>Martin Wilby</td>
<td>Deputy Leader, Communities and Localism</td>
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<tr>
<td>Yvonne Bendle</td>
<td>Housing and Public Health</td>
</tr>
<tr>
<td>David Bills</td>
<td>Innovation and Efficiency</td>
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<tr>
<td>Keith Kiddie</td>
<td>Environment and Regulation</td>
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<tr>
<td>Garry Wheatley</td>
<td>Finance and Resources</td>
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</table>

b. Scrutiny Committee – Report of the Chairman

Questions to the Chairman

(Report attached – page 40)

c. Licensing, Appeals and Complaints Committee/Licensing and Gambling Acts Committee – Report of the Chairman

Questions to the Chairman

(Report attached – page 43)

d. Development Management Committee – Report of the Chairman

Questions to the Chairman

(Report attached – page 44)

12. Representatives on Strategic Outside Bodies;

To receive feedback from representatives as set out below:

(Report on the Police and Crime Panel for Norfolk attached – page 45)

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Cllr Gould</td>
<td>Broads Authority</td>
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<td>Cllr Fuller</td>
<td>LGA General Assembly</td>
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<tr>
<td>Cllr J Savage</td>
<td>LGA Rural Commission</td>
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<tr>
<td>Cllr Legg</td>
<td>Norfolk Health Overview and Scrutiny Committee</td>
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<tr>
<td>Cllr C Kemp</td>
<td>Norfolk Police and Crime Panel</td>
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<td>Cllr Kiddie</td>
<td>Norfolk Waste Partnership</td>
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<td>Cllr Wilby</td>
<td>South Norfolk Alliance</td>
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<tr>
<td>Cllr Palmer and Overton</td>
<td>Saffron Housing Trust</td>
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13. To consider any correspondence
South Norfolk Council
Council Tax Support Scheme
2014/2015

S13A and Schedule 1a of the Local Government Finance Act 1992
South Norfolk Council

Council Tax Support Scheme

1.0 Introduction to the Council Tax Support Scheme

PART 2 Interpretation
2.0 Interpretation

3.0 Application of scheme: pensioners and persons who are not pensioners

4.0 Meaning of “couple”

5.0 Polygamous marriages

6.0 Meaning of “family”

7.0 Circumstances in which a person is to be treated as responsible or not responsible for another

8.0 Households

9.0 Non-dependants

10.0 Remunerative work

PART 3 Procedural Matters
11.0 Procedural Matters

PART 4 Classes of person entitled to support under this scheme

12.0 Classes of person entitled to support under this scheme

13.0 Class A: pensioners or lone parents with a child under 5 years of age whose income is less than the applicable amount

14.0 Class B: pensioners or lone parents with a child under 5 years of age whose income is greater than the applicable amount

15.0 Class C: Alternative Maximum Council Tax Support – pensioners or lone parents with a child under 5 years of age

16.0 Class D: persons who are not pensioners or lone parents with a child under 5 years of age whose income is less than the applicable amount

17. Class E: persons who are not pensioners or lone parents with a child under 5 years of age whose income is greater than the applicable amount

18.0 Class F: Alternative Maximum Council Tax Support – persons who are not pensioners or lone parents with a child under 5 years of age

19.0 Periods of absence from a dwelling

PART 5 Classes of person excluded from this scheme

20.0 Classes of person excluded from this scheme

21.0 Class of person excluded from this scheme: persons treated as not being in Great Britain

22.0 Class of person excluded from this scheme: persons subject to immigration control

23.0 Class of person excluded from this scheme: capital limit

24.0 Class of person excluded from this scheme: students

PART 6 Applicable amounts

25.0 Applicable amounts: pensioners
26.0 Applicable amounts: persons who are not pensioners ................................................................. 27
27.0 Polygamous marriages: persons who are not pensioners ............................................................ 28
28.0 Applicable amount: persons who are not pensioners who have an award of universal credit .... 29
PART 7 Maximum Council Tax Support for the purposes of calculating eligibility for support under this scheme and amount of support .................................................................................................................. 29
29.0 Maximum Council Tax Support under this scheme: pensioners or lone parents with a child under 5 years of age ........................................................................................................................................... 29
29A Maximum Council Tax Support under this scheme: persons who are not pensioners or lone parents with a child under 5 years of age ........................................................................................................................................... 30
30.0 Non-dependant deductions: pensioners .......................................................................................... 30
30A Non-dependant deductions: persons who are not pensioners ....................................................... 31
PART 8 Alternative Maximum Council Tax Support for the purposes of calculating eligibility for support under this scheme and amount of support ......................................................................................... 34
31.0 Alternative Maximum Council Tax Support under this scheme: pensioners and lone parents with a child under 5 years of age ........................................................................................................................................... 34
PART 9 Amount of support under this scheme ..................................................................................... 33
32.0— Amount of support under this scheme: Classes A to E ............................................................ 343
PART 10 Income and capital for the purposes of calculating eligibility for support under this scheme and amount of support .......................................................................................................................... 35
CHAPTER 1 Income and capital: general ............................................................................................... 35
33.0 Calculation of income and capital: applicant's family and polygamous marriages .................. 35
34.0 Circumstances in which income and capital of non-dependant is to be treated as applicant's .... 35
CHAPTER 2 Income and capital: pensioners in receipt of guarantee credit or savings credit .......... 35
35.0 Applicant in receipt of guarantee credit: pensioners ........................................................................ 35
36.0 Calculation of applicant's income and capital in savings credit only cases: pensioners ............ 35
CHAPTER 3 Income and capital where there is an award of universal credit .................................. 37
37.0 Calculation of income and capital: persons who are not pensioners who have an award of universal credit ............................................................................................................................................... 37
CHAPTER 4 Income: other pensioners .................................................................................................. 37
38.0 Calculation of income and capital where state pension credit is not payable: pensioners ........ 37
39.0 Meaning of "income": pensioners .................................................................................................. 37
40.0 Calculation of weekly income: pensioners and lone parents with a child under 5 years of age ........................................................................................................................................... 40
41.0 Earnings of employed earners: pensioners and lone parents with a child under 5 years of age ........................................................................................................................................... 41
42.0 Calculation of net earnings of employed earners: pensioners and lone parents with a child under 5 years of age ........................................................................................................................................... 42
43.0 Calculation of earnings of self-employed earners: pensioners and lone parents with a child under 5 years of age .................................................................43
44.0 Earnings of self-employers earners: pensioners and lone parents with a child under 5 years of age .................................................................43
45.0 Notional income: pensioners ..................................................................................44
46.0 Income paid to third parties: pensioners ..................................................................46
CHAPTER 5 Income: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................................................................46
47.0 Average weekly earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................46
48.0 Average weekly earnings of self-employed earners: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................47
49.0 Average weekly income other than earnings: persons who are not pensioners or lone parents with a child under 5 years of age ..........................................................................................47
50.0 Calculation of weekly income of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................47
51.0 Earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................48
52.0 Calculation of net earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age ..................................................................................48
53.0 Earnings of self-employed earners: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................50
54.0 Calculation of income other than earnings: persons who are not pensioners ...............50
55.0 Capital treated as income: persons who are not pensioners ......................................52
56.0 Notional income: persons who are not pensioners ..................................................52
CHAPTER 6 Income: further provisions applying to all applicants ........................................55
57.0 Calculation of income on a weekly basis ....................................................................55
58.0 Treatment of child care charges ..................................................................................55
59.0 Calculation of weekly income from tax credits ..........................................................60
60.0 Disregard of changes in tax, contributions etc. ..........................................................60
61.0 Calculation of net profit of self-employed earners .....................................................61
62.0 Calculation of deduction of tax and contributions of self-employed earners ...............63
CHAPTER 7 Capital ...........................................................................................................63
63.0 Calculation of capital ..................................................................................................63
64.0 Income treated as capital: persons who are not pensioners .......................................64
65.0 Calculation of capital in the United Kingdom ............................................................64
66.0 Calculation of capital outside the United Kingdom .....................................................65
67.0 Notional capital ........................................................................................................65
68.0 Diminishing notional capital rule: pensioners ................................................................. 67
69.0 Diminishing notional capital rule: persons who are not pensioners ................................ 69
70.0 Capital jointly held ........................................................................................................... 72
71.0 Calculation of tariff income from capital: pensioners ..................................................... 72
72.0 Calculation of tariff income from capital: persons who are not pensioners .................. 72
PART 11 Students .................................................................................................................... 73
CHAPTER 1 General .............................................................................................................. 73
73.0 Interpretation ................................................................................................................... 73
74.0 Treatment of students ..................................................................................................... 76
75.0 Students who are excluded from entitlement to support under this scheme ................... 76
CHAPTER 2 Income ............................................................................................................. 78
76.0 Calculation of grant income ............................................................................................ 78
77.0 Calculation of covenant income where a contribution is assessed ................................. 79
78.0 Covenant income where no grant income or no contribution is assessed ....................... 79
79.0 Relationship with amounts to be disregarded under Schedule 8 ................................. 79
80.0 Other amounts to be disregarded .................................................................................. 80
81.0 Treatment of student loans ............................................................................................ 80
82.0 Treatment of payments from access funds ..................................................................... 81
83.0 Disregard of contribution ............................................................................................... 82
84.0 Further disregard of student's income ............................................................................ 82
85.0 Income treated as capital ............................................................................................... 82
86.0 Disregard of changes occurring during summer vacation .............................................. 82
PART 12 Extended Council Tax Support .................................................................................. 83
CHAPTER 1 Extended support: pensioners ........................................................................... 83
87.0 Extended support: pensioners ....................................................................................... 83
88.0 Extended support (qualifying contributory benefits): pensioners ................................. 83
89.0 Duration of extended support period (qualifying contributory benefits): pensioners ........ 83
90.0 Amount of extended support (qualifying contributory benefits): pensioners ................. 84
91.0 Extended support (qualifying contributory benefits)—movers: pensioners .................... 84
92.0 Relationship between extended support (qualifying contributory benefits) and entitlement to support by virtue of classes A to C ................................................................. 84
93.0 Continuing support where state pension credit claimed: pensioners ............................. 84
CHAPTER 2 Extended support: persons who are not pensioners ........................................... 85
94.0 Extended support: persons who are not pensioners ...................................................... 85
95.0 Extended support: persons who are not pensioners, including lone parents with a child under 5 years of age .............................................................................................................. 85
96.0 Duration of extended support period: persons who are not pensioners ......................... 86
97.0 Amount of extended support: persons who are not pensioners ..................................... 87
98.0 Extended support—movers: persons who are not pensioners ........................................87
99.0 Relationship between extended support and entitlement to support by virtue of classes D to F 87
100.0— Extended support (qualifying contributory benefits): persons who are not pensioners ..........88
101.0 Duration of extended support period (qualifying contributory benefits): persons who are not pensioners .........................................................................................................................................................................................88
102.0— Amount of extended support (qualifying contributory benefits): persons who are not pensioners .........................................................................................................................................................................................88
103.0 Extended support (qualifying contributory benefits) — movers: persons who are not pensioners .........................................................................................................................................................................................89
104.0 Relationship between extended support (qualifying contributory benefits) and entitlement to support by virtue of classes D to F ..........................................................................................................................89
CHAPTER 3 Extended support: movers in the authority's area .........................................................89
105.0 Extended support: applicant moving into the authority's area .............................................. 89
PART 13 When entitlement begins and change of circumstances takes effect .................................................91
106.0 Date on which entitlement begins .........................................................................................91
107.0 Date on which change of circumstances is to take effect .........................................................91
107A When beneficial changes of circumstances take effect .............................................................91
107B Conditions for accepting a delay in notification of a change ....................................................91
108.0 Change of circumstances where state pension credit in payment .............................................93
PART 14 Application (including duties to notify authority of change of circumstances) ................95
109.0 Making an application ...........................................................................................................95
110.0 Date on which an application is made .....................................................................................96
111.0 Back-dating of applications: pensioners ...................................................................................98
112.0 Back-dating of applications: persons who are not pensioners ..................................................98
113.0 Information and evidence .........................................................................................................98
113A Suspension and termination of support and other matters: persons who are not pensioners or lone parents with a child under 5 years of age .................................................................................100
114.0 Amendment and withdrawal of application ...........................................................................101
115.0 Duty to notify changes of circumstances ..............................................................................101
PART 15 Decisions by authority .........................................................................................................102
116.0 Decision by authority .............................................................................................................102
117.0 Notification of decision ...........................................................................................................103
PART 16 Circumstances in which a payment may be made .................................................................103
118.0— Payment where there is joint and several liability ..............................................................103
Schedule 1 ...........................................................................................................................................105
Procedural matters ............................................................................................................................105
PART 1 Procedure by which a person may apply for support under this scheme ................................106
PART 2 Procedure by which a person may make an appeal against certain decisions of the authority .................................................................................................................................................. 106

PART 3 Procedure for an application to the authority for support under section 13A(1)(c) of the 1992
Act .............................................................................................................................................. 107

PART 4 Electronic communication ................................................................................................................................. 107
Schedule 2 .................................................................................................................................................... 110
Applicable amounts: pensioners ............................................................................................................................ 110
1. Personal allowance ........................................................................................................................................... 111
2. Child or young person amounts .................................................................................................................... 111
3. Family premium ......................................................................................................................................... 112
4. Premiums .................................................................................................................................................. 112
6. Severe disability premium ............................................................................................................................ 112
7. Enhanced disability premium ........................................................................................................................ 114
8. Disabled child premium ............................................................................................................................... 114
9. Carer premium ........................................................................................................................................ 114
10. Persons in receipt of concessionary payments .......................................................................................... 115
11. Person in receipt of benefit ........................................................................................................................ 115
12. Amounts of premium specified .................................................................................................................. 115
Schedule 3 .................................................................................................................................................. 117
Applicable amounts: persons who are not pensioners ........................................................................................ 117
Personal allowances ...................................................................................................................................... 118
Family premium ....................................................................................................................................... 119
Premiums ................................................................................................................................................ 120
9. Disability premium ................................................................................................................................... 120
10. Additional condition for the disability premium ......................................................................................... 120
11. Severe disability premium ........................................................................................................................ 122
12. Enhanced disability premium ..................................................................................................................... 124
13. Disabled child premium ............................................................................................................................. 124
14. Carer premium ......................................................................................................................................... 124
15. Persons in receipt of concessionary payments .......................................................................................... 125
16. Persons in receipt of benefit for another .................................................................................................. 125
17. Amounts of Premiums Specified ................................................................................................................ 125
18. The components ..................................................................................................................................... 126
Schedule 4 ................................................................................................................................................ 130
Amount of Alternative Maximum Council Tax Support: pensioners and persons who are not
pensioners ................................................................................................................................................... 130
Schedule 5 ................................................................................................................................................ 133
Sums disregarded from applicant’s earnings: pensioners .................................................................................. 133

7
Schedule 6 ............................................................................................................................................. 138
Amounts to be disregarded in the calculation of income other than earnings: pensioners .......... 138
Schedule 7 ............................................................................................................................................. 143
Sums disregarded in the calculation of earnings: persons who are not pensioners, including lone
parents with a child under 5 years of age ......................................................................................... 143
Schedule 8 ............................................................................................................................................. 149
Sums disregarded in the calculation of income other than earnings: persons who are not pensioners,
including lone parents with a child under 5 years of age ............................................................... 149
Schedule 9 ............................................................................................................................................. 161
Capital disregards: pensioners ............................................................................................................. 161
Capital disregarded only for the purposes of determining deemed income ............................... 168
Schedule 10 .......................................................................................................................................... 169
Capital disregards: persons who are not pensioners ........................................................................ 169
Schedule 11 .......................................................................................................................................... 181
Additional discretionary payments due to exceptional and/or extreme hardship ..................... 181
Schedule 12 .......................................................................................................................................... 183
Enhanced Temporary Support ............................................................................................................. 183
PART 1 Introduction

1.0 Introduction to the Council Tax Support Scheme

This document details how the scheme will operate for both pension credit age and working age applicants and in accordance with Section 13a of the Local Government Finance Act 1992 specifies the classes of person who are to be entitled to support under the scheme and is effective from 1st April 2014.

This Council Tax Support Scheme has been adopted by the Council and takes effect for the year commencing 1st April 2014. The Council reserves the right to review the scheme in respect of subsequent years.

The scheme in respect of pension age applicants is defined by Central Government within the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012 and the Local Government Finance Act 1992 (as amended). The Council has no discretion in relation to the calculation of Council Tax Support in respect of the pension age scheme and it is designed to provide broadly the same level of support provided within the previous Council Tax Benefit scheme, prior to April 2013.
PART 2 Interpretation

2.0 Interpretation

(1) In this scheme—

“the 1992 Act” means the Local Government Finance Act 1992;

“Abbeyfield Home” means an establishment run by the Abbeyfield Society including all bodies corporate or unincorporated which are affiliated to that society;

“adoption leave” means a period of absence from work on ordinary or additional adoption leave by virtue of section 75A or 75B of the Employment Rights Act 1996 ¹;

“an AFIP” means an armed forces independence payment payable in accordance with an armed and reserve forces compensation scheme established under section 1(2) of the Armed Forces (Pensions and Compensation) Act 2004;

“Alternative Maximum Council Tax Support” means the amount determined in accordance with paragraph 31 and Schedule 4:

“applicable amount” means
(a) in relation to a pensioner, the amount calculated in accordance with paragraph 25 and Schedule 2; and
(b) in relation to a person who is not a pensioner, the amount calculated in accordance with
(i) paragraph 26 and Schedule 3; or
(ii) paragraph 28, as the case may be;

“applicant” means a person who has made an application;

“application” means an application for support under this scheme;

“assessment period” means
(a) in relation to pensioners:
(i) in relation to the earnings of a self-employed earner, the period determined in accordance with paragraph 43 for the purpose of calculating the weekly earnings of the applicant; or
(ii) in relation to any other income, the period determined in accordance with paragraph 40 for the purpose of calculating the weekly income of the applicant;
(b) in relation to persons who are not pensioners, such period as is set out in paragraphs 47 to 49 over which income falls to be calculated;

“attendance allowance” means
(a) an attendance allowance under Part 3 of the SSCBA;
(b) an increase of disablement pension under section 104 or 105 of that Act;
(c) a payment by virtue of article 14, 15, 16, 43 or 44 of the Personal Injuries (Civilians) Scheme 1983 or any analogous payment; or
(d) any payment based on need for attendance which is paid as part of a war disablement pension;

“the authority” means a billing authority in relation to whose area this scheme has effect by virtue of paragraph 4(6) of Schedule 1A to the 1992 Act;

“basic rate” has the meaning given by the Income Tax Act 2007;

“the benefit Acts” means the SSCBA, the Jobseekers Act 1995, the State Pension Credit Act 2002 and the Welfare Reform Act 2007;

“board and lodging accommodation” means accommodation provided to a person or, if he is a member of a family, to him or any other member of his family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises;

“care home” has the meaning given by section 3 of the Care Standards Act 2000 and in Scotland means a care home service within the meaning given by section 2(3) of the Regulation of Care (Scotland) Act 2001 and in Northern Ireland means a nursing home within the meaning of Article 11 of the Health and Personal Social Services (Quality, Improvement and Regulation) (Northern Ireland) Order 2003 or a residential care home within the meaning of Article 10 of that Order;
“the Caxton Foundation” means the charitable trust of that name established on 28th March 2011 out of funds provided by the Secretary of State for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with its provisions;
“child” means a person under the age of 16;
“child benefit” has the meaning given by section 141 of the SSCBA;
“child tax credit” means a child tax credit under section 8 of the Tax Credits Act 2002;
“close relative” means a parent, parent-in-law, son, son-in-law, daughter, daughter-in-law, step-parent, step-son, step-daughter, brother, sister, or if any of the preceding persons is one member of a couple, the other member of that couple;
“concessionary payment” means a payment made under arrangements made by the Secretary of State with the consent of the Treasury which is charged either to the National Insurance Fund or to a Departmental Expenditure Vote to which payments of benefit or tax credits under the benefit Acts or the Tax Credits Act 2002 are charged;
“contributory employment and support allowance” means a contributory allowance under Part 1 of the Welfare Reform Act 2007;
“council tax benefit” means council tax benefit under Part 7 of the SSCBA;
“couple” has the meaning given by paragraph 4;
“designated office” means the office of the authority designated by it for the receipt of application;
(a) by notice upon or with a form supplied by it for the purpose of making an application; or
(b) by reference upon or with such a form to some other document available from it and sent by electronic means or otherwise on application and without charge; or
(c) by any combination of the provisions set out in paragraphs (a) and (b);
“disability living allowance” means a disability living allowance under section 71 of the SSCBA;
“earnings” has the meaning given by paragraph 41, 44, 51 or 53 as the case may be;
“the Eileen Trust” means the charitable trust of that name established on 29th March 1993 out of funds provided by the Secretary of State for the benefit of persons eligible for payment in accordance with its provisions;
“electronic communication” has the same meaning as in section 15(1) of the Electronic Communications Act 2000;
“employed earner” is to be construed in accordance with section 2(1)(a) of the SSCBA and also includes a person who is in receipt of a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay or statutory maternity pay;
“the Employment, Skills and Enterprise Scheme” means a scheme under section 17A (schemes for assisting persons to obtain employment: “‘work for your benefit’” schemes etc.) of the Jobseekers Act 1995 known by that name and provided pursuant to arrangements made by the Secretary of State that is designed to assist claimants for jobseekers allowance to obtain employment, including self-employment, and which may include for any individual work-related activity (including work experience or job search);
“employment zone” means an area within Great Britain designated for the purposes of section 60 of the Welfare Reform and Pensions Act 1999 and an “employment zone programme” means a programme established for such an area or areas designed to assist claimants for a jobseeker’s allowance to obtain sustainable employment;
“enactment” includes an enactment comprised in, or in an instrument made under, an Act of the Scottish Parliament;
“enhanced temporary support” means that maximum support is given for the first 13 weeks (see Schedule 12)
“extended support” means support under this scheme for which a person is eligible under Part 12 (extended support);
“extended support period” means the period for which a person is in receipt of extended support in accordance with paragraph 89, 96 or 101;
“extended support (qualifying contributory benefits)” means support under this scheme for which a person is eligible in accordance with paragraph 88 or 95;
“family” has the meaning given by paragraph 6;
“the Fund” means moneys made available from time to time by the Secretary of State for the benefit of persons eligible for payment in accordance with the provisions of a scheme established by him on 24th April 1992 or, in Scotland, on 10th April 1992;
“guarantee credit” is to be construed in accordance with sections 1 and 2 of the State Pension Credit Act 2002;
“a guaranteed income payment” means a payment made under article 15(1)(c) (injury benefits) or 29(1)(a) (death benefits) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011;
“housing benefit” means housing benefit under Part 7 of the SSCBA;
“an income-based jobseeker’s allowance” and “a joint-claim jobseeker’s allowance” have the meanings given by section 1(4) of the Jobseekers Act 1995;
“income-related employment and support allowance” means an income-related allowance under Part 1 of the Welfare Reform Act 2007;
“independent hospital”
(a) in England means a hospital as defined by section 275 of the National Health Service Act 2006 that is not a health service hospital as defined by that section;
(b) in Wales has the meaning given by section 2 of the Care Standards Act 2000; and
(c) in Scotland means an independent health care service as defined by section 10F of the National Health Service (Scotland) Act 1978;
“the Independent Living Fund (2006)” means the Trust of that name established by a deed dated 10th April 2006 and made between the Secretary of State for Work and Pensions of the one part and Margaret Rosemary Cooper, Michael Beresford Boyall and Marie Theresa Martin of the other part;
“invalid carriage or other vehicle” means a vehicle propelled by a petrol engine or by electric power supplied for use on the road and to be controlled by the occupant;
“the London Bombings Relief Charitable Fund” means the company limited by guarantee (number 5505072), and registered charity of that name established on 11th July 2005 for the purpose of (amongst other things) relieving sickness, disability or financial need of victims (including families or dependants of victims) of the terrorist attacks carried out in London on 7th July 2005;
“lone parent” means a person who has no partner and who is responsible for and a member of the same household as a child or young person;
“the Macfarlane (Special Payments) Trust” means the trust of that name, established on 29th January 1990 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia;
“the Macfarlane (Special Payments) (No. 2) Trust” means the trust of that name, established on 3rd May 1991 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia and other beneficiaries;
“the Macfarlane Trust” means the charitable trust, established partly out of funds provided by the Secretary of State to the Haemophilia Society, for the relief of poverty or distress among those suffering from haemophilia;
“main phase employment and support allowance” means an employment and support allowance where the calculation of the amount payable in respect of the applicant includes a component under section 2(1)(b) or 4(2)(b) of the Welfare Reform Act 2007 except in Part 1 of Schedule 3;
“maternity leave” means a period during which a woman is absent from work because she is pregnant or has given birth to a child, and at the end of which she has a right to return to work either under the terms of her contract of employment or under Part 8 of the Employment Rights Act 1996;
“maximum Council Tax Support amount” means the amount determined in accordance with paragraph 29;
“member of a couple” means a member of a married or unmarried couple;
“MFET Limited” means the company limited by guarantee (number 7121661) of that name, established for the purpose in particular of making payments in accordance with arrangements made with the Secretary of State to persons who have acquired HIV as a result of treatment by the NHS with blood or blood products;
“minimum income floor” means assuming the national minimum wage for the number of hours worked.

“mobility supplement” means
(a) in relation to pensioners, a supplement to which paragraph 5(1)(a)(vii) of Schedule 5 refers;
(b) in relation to persons who are not pensioners, a supplement to which paragraph 13 of Schedule 8 refers;

“mover” means an applicant who changes the dwelling in which the applicant is resident, and
in respect of which the applicant is liable to pay council tax, from a dwelling in the area of
the authority to a dwelling in the area of a second authority;

“net earnings” means such earnings as are calculated in accordance with paragraph 42 or 52, as the case may be;

“net profit” means such profit as is calculated in accordance with paragraph 61;

“new dwelling” means, for the purposes of the definition of “second authority” and
paragraphs 91, 98 and 103, the dwelling to which an applicant has moved, or is about to
move, in which the applicant will be resident;

“non-dependant” has the meaning given by paragraph 9;

“occasional assistance” means any payment or provision made by a local authority, the
Welsh Ministers or the Scottish Ministers for the purposes of:
(a) meeting, or helping to meet an immediate short-term need—
(i) arising out of an exceptional event or exceptional circumstances, or
(ii) that needs to be met to avoid a risk to the well-being of an individual, and
(b) enabling qualifying individuals to establish or maintain a settled home, and—
(i) “local authority” has the meaning given by section 270(1) of the Local Government
Act 1972; and
(ii) “qualifying individuals” means individuals who have been, or without the assistance
might otherwise be
(aa) in prison, hospital, an establishment providing residential care or other institution,
or
(bb) homeless or otherwise living an unsettled way of life; and “local authority” means
a local authority in England within the meaning of the Local Government Act 1972;

“occupational pension” means any pension or other periodical payment under an
occupational pension scheme but does not include any discretionary payment out of a
fund established for relieving hardship in particular cases;

“occupational pension scheme” has the same meaning as in section 1 of the Pension
Schemes Act 1993;

“partner”, in relation to a person, means:
(a) where that person is a member of a couple, the other member of that couple;
(b) subject to paragraph (c), where that person is polyggrily married to two or more
members of his household, any such member to whom he is married; or
(c) where that person is polygously married and has an award of universal credit with
the other party to the earliest marriage that still subsists, that other party to the
earliest marriage;

“passported benefits” means any of the following: Income Support, Job Seekers Allowance
(Income Based), Employment & Support Allowance (Income Related)

“paternity leave” means a period of absence from work on ordinary paternity leave by virtue
of section 80A or 80B of the Employment Rights Act 1996 or an additional paternity leave
by virtue of section 80AA or 80BB of that Act;

“pension fund holder” means with respect to a personal pension scheme or an occupational
pension scheme, the trustees, managers or scheme administrators, as the case may be, of
the scheme concerned;

“pensionable age” has the meaning given by the rules in paragraph 1 of Schedule 4 to the
Pensions Act 1995;

“pensioner” has the meaning given by paragraph 3(2)(a);

“person on income support” means a person in receipt of income support;

“person treated as not being in Great Britain” has the meaning given by paragraph 21;

“person who is not a pensioner” has the meaning given by paragraph 3(2)(b);
“personal independence payment” has the meaning given by Part 4 of the Welfare Reform Act 2012;

“personal pension scheme” means:
(a) a personal pension scheme as defined by section 1 of the Pension Schemes Act 1993;
(b) an annuity contract or trust scheme approved under section 620 or 621 of the Income and Corporation Taxes Act 1988 or a substituted contract within the meaning of section 622(3) of that Act which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(f) of Schedule 36 to the Finance Act 2004;
(c) a personal pension scheme approved under Chapter 4 of Part 14 of the Income and Corporation Taxes Act 1988 which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(g) of Schedule 36 to the Finance Act 2004;

“policy of life insurance” means any instrument by which the payment of money is assured on death (except death by accident only) or the happening of any contingency dependent on human life, or any instrument evidencing a contract which is subject to payment of premiums for a term dependent on human life;

“polygamous marriage” means any marriage to which paragraph 5 applies;
“protected group” means a lone parent with a child under 5 years of age;
“qualifying age for state pension credit” means (in accordance with section 1(2)(b) and (6) of the State Pension Credit Act 2002)
(a) in the case of a woman, pensionable age; or
(b) in the case of a man, the age which is pensionable age in the case of a woman born on the same day as the man;

“qualifying contributory benefit” means
(a) severe disablement allowance;
(b) incapacity benefit;
(c) contributory employment and support allowance;

“qualifying income-related benefit” means
(a) income support;
(b) income-based jobseeker’s allowance;
(c) income-related employment and support allowance;

“qualifying person” means a person in respect of whom payment has been made from the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;

“relative” means a close relative, grandparent, grandchild, uncle, aunt, nephew or niece;

“relevant week”, in relation to any particular day, means the week within which the day in question falls;

“remunerative work” has the meaning given by paragraph 10;

“rent” means ““eligible rent”” to which regulation 12 of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 12, refer, less any deductions in respect of non-dependants which fall to be made under paragraph 30 (non-dependant deductions);

“savings credit” is to be construed in accordance with sections 1 and 3 of the State Pension Credit Act 2002;

“second authority” means the authority to which a mover is liable to make payments for the new dwelling;

“self-employed earner” is to be construed in accordance with section 2(1)(b) of the SSCBA;

“self-employment route” means assistance in pursuing self-employed earner’s employment whilst participating in:
(a) an employment zone programme;
(b) a programme provided by or under arrangements made pursuant to section 2 of the Employment and Training Act 1973 (functions of the Secretary of State) or section 2 of the Enterprise and New Towns (Scotland) Act 1990 (functions in relation to training for employment, etc.); or
(c) the Employment, Skills and Enterprise Scheme;

“service user group” means a group of individuals that is consulted by or on behalf of:
(a) a Health Board, Special Health Board or the Agency in consequence of a function under section 2B of the National Health Service (Scotland) Act 1978;
(b) a landlord authority in consequence of a function under section 105 of the Housing Act 1985;
(c) a public authority in Northern Ireland in consequence of a function under section 49A of the Disability Discrimination Act 1995;
(d) a public authority in consequence of a function under section 149 of the Equality Act 2010;
(e) a best value authority in consequence of a function under section 3 of the Local Government Act 1999;
(f) a local authority landlord or registered social landlord in consequence of a function under section 53 of the Housing (Scotland) Act 2001;
(g) a relevant English body or a relevant Welsh body in consequence of a function under section 242 of the National Health Service Act 2006;
(h) a Local Health Board in consequence of a function under section 183 of the National Health Service (Wales) Act 2006;
(i) the Care Quality Commission in exercise of a function under section 4 or 5 of the Health and Social Care Act 2008;
(j) the regulator or a private registered provider of social housing in consequence of a function under section 98, 193 or 196 of the Housing and Regeneration Act 2008; or
(k) a public or local authority in Great Britain in consequence of a function conferred under any other enactment,
for the purposes of monitoring and advising on a policy of that body or authority which affects or may affect persons in the group, or of monitoring or advising on services provided by that body or authority which are used (or may potentially be used) by those persons;
“single applicant” means an applicant who neither has a partner nor is a lone parent;
“the Skipton Fund” means the ex-gratia payment scheme administered by the Skipton Fund Limited, incorporated on 25th March 2004, for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with the scheme’s provisions;
“sports award” means an award made by one of the Sports Councils named in section 23(2) of the National Lottery etc. Act 1993 out of sums allocated to it for distribution under that section;
“the SSCBA” means the Social Security Contributions and Benefits Act 1992;
“state pension credit” means state pension credit under the State Pension Credit Act 2002;
“student” has the meaning given by paragraph 73;
“support week” means a period of seven consecutive days beginning with a Monday and ending with a Sunday;
“tax year” means a period beginning with 6th April in one year and ending with 5th April in the next;
“training allowance” means an allowance (whether by way of periodical grants or otherwise) payable:
(a) out of public funds by a Government department or by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise, the Chief Executive of Skills Funding or the Welsh Ministers;
(b) to a person for his maintenance or in respect of a member of his family; and
(c) for the period, or part of the period, during which he is following a course of training or instruction provided by, or in pursuance of arrangements made with, that department or approved by that department in relation to him or so provided or approved by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise or the Welsh Ministers,
but it does not include an allowance paid by any Government department to or in respect of a person by reason of the fact that he is following a course of full-time education, other than under arrangements made under section 2 of the Employment and Training Act 1973, or is training as a teacher;
“the Trusts” (except where the context otherwise requires) means the Macfarlane Trust, the Macfarlane (Special Payments) Trust and the Macfarla?ne (Special Payments) (No. 2) Trust and “Trustees” is to be construed accordingly;
“universal credit” has the meaning given by section 1 of the Welfare Reform Act 2012;

“voluntary organisation” means a body, other than a public or local authority, the activities of which are carried on otherwise than for profit;

“war disablement pension” means any retired pay or pension or allowance payable in respect of disablement under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003;

“war pension” means a war disablement pension, a war widow’s pension or a war widower’s pension;

“war pensioner” means a person in receipt of a war pension;

“war widow’s pension” means any pension or allowance payable to a woman as a widow under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

“war widower’s pension” means any pension or allowance payable to a man as a widower or to a surviving civil partner under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

“water charges” means:
(a) as respects England and Wales, any water and sewerage charges under Chapter 1 of Part 5 of the Water Industry Act 1991,
(b) as respects Scotland, any water and sewerage charges established by Scottish Water under a charges scheme made under section 29A of the Water Industry (Scotland) Act 2002;

“working age” has the meaning given by paragraph 3(2)(b); in so far as such charges are in respect of the dwelling which a person occupies as his home;

“working tax credit” means a working tax credit under section 10 of the Tax Credits Act 2002;

“young person” means a person who falls within the definition of qualifying young person in section 142 of the SSCBA.

(2) In this scheme, where an amount is to be rounded to the nearest penny, a fraction of a penny must be disregarded if it is less than half a penny and must otherwise be treated as a whole penny.

(3) For the purpose of this scheme, a person is on an income-based jobseeker’s allowance on any day in respect of which an income-based jobseeker’s allowance is payable to him and on any day:
(a) in respect of which he satisfies the conditions for entitlement to an income-based jobseeker’s allowance but where the allowance is not paid because of a reduction in accordance with section 19 or 19A or regulations made under section 17A or 19B of the Jobseekers Act 1995 (circumstances in which a jobseeker’s allowance is not payable);
(b) which is a waiting day for the purposes of paragraph 4 of Schedule 1 to that Act and which falls immediately before a day in respect of which an income-based jobseeker’s allowance is payable to him or would be payable to him but for section 19 or 19A or regulations made under section 17A or 19B of that Act; or
(c) in respect of which an income-based jobseeker’s allowance would be payable but for a restriction imposed pursuant to section 6B, 7, 8 or 9 of the Social Security Fraud Act 2001 (loss of benefit provisions).

(4) For the purposes of this scheme, a person is on an income-related employment and support allowance on any day in respect of which an income-related employment and support allowance is payable to him and on any day:
(a) in respect of which he satisfies the conditions for entitlement to an income-related employment and support allowance but where the allowance is not paid in accordance with section 18 of the Welfare Reform Act 2007 (disqualification); or
(b) which is a waiting day for the purposes of paragraph 2 of Schedule 2 to that Act (employment and support allowance: supplementary provisions) and which falls immediately before a day in respect of which an income-related employment and
support allowance is payable to him or would be payable to him but for section 18 of that Act.

(5) For the purposes of this scheme, two persons must be taken to be estranged only if their estrangement constitutes a breakdown of the relationship between them.

(6) In this scheme, references to any person in receipt of state pension credit includes a person who would be in receipt of state pension credit but for regulation 13 of the State Pension Credit Regulations 2002 (small amounts of state pension credit).

3.0 Application of scheme: pensioners and persons who are not pensioners

(1) This scheme applies to—
   (a) pensioners who fall within any of classes A to C; and
   (b) persons who are not pensioners who fall within any of classes D to F.

(2) In this scheme:
   (a) a person is a “pensioner” if—
      (i) he has attained the qualifying age for state pension credit; and
      (ii) he is not, or, if he has a partner, his partner is not—
         (aa) a person on income support, on an income-based jobseeker’s allowance
         or on an income-related employment and support allowance, or
         (bb) a person with an award of universal credit; and
   (b) a person is a “person who is not a pensioner” or “working age” if—
      (i) he has not attained the qualifying age for state pension credit; or
      (ii) he has attained the qualifying age for state pension credit and he, or if he has a
      partner, his partner, is—
         (aa) a person on income support, on an income-based jobseeker’s allowance
         or on an income-related employment and support allowance, or
         (bb) a person with an award of universal credit.

4.0 Meaning of “couple”

(1) In this scheme “couple” means:
   (a) a man and woman who are married to each other and are members of the same
       household;
   (b) a man and woman who are not married to each other but are living together as
       husband and wife;
   (c) two people of the same sex who are civil partners of each other and are members of
       the same household; or
   (d) two people of the same sex who are not civil partners of each other but are living
       together as if they were civil partners.

(2) Two people of the same sex are to be treated as living together as if they were civil
    partners if, and only if, they would be treated as living together as husband and wife were
    they of opposite sexes.

5.0 Polygamous marriages

(1) This paragraph applies to any case where—
   (a) a person is a husband or wife by virtue of a marriage entered into under a law which
       permits polygamy; and
   (b) either party to the marriage has for the time being any spouse additional to the
       other party.

(2) For the purposes of paragraph 4 (meaning of “couple”) neither party to the marriage is to
be taken to be a member of a couple.

6.0 Meaning of “family”

(1) In this scheme “family” means
(a) a couple;
(b) a couple and a member of the same household for whom one of them is or both are
responsible and who is a child or a young person; or
(c) a person who is not a member of a couple and a member of the same household for
whom that person is responsible and who is a child or a young person.

(2) The references to a child or young person in sub-paragraph (1)(b) and (c) include a child or
young person in respect of whom section 145A of the SSCBA applies for the purposes of
entitlement to child benefit, but only for the period prescribed under section 145A(1).

(3) The references to a young person in sub-paragraph (1)(b) and (c) do not include a young
person who is—
(a) on income support, an income-based jobseeker’s allowance or an income-related
employment and support allowance, or has an award of universal credit; or
(b) a person to whom section 6 of the Children (Leaving Care) Act 2000 (exclusion from
benefits) applies.

7.0 Circumstances in which a person is to be treated as responsible or not responsible for another

(1) A person is to be treated as responsible for a child or young person who is normally living
with him, including a child or young person to whom paragraph 6(2) applies.

(2) Where a child or young person spends equal amounts of time in different households, or
where there is a question as to which household he is living in, the child or young person
must be treated for the purposes of sub-paragraph (1) as normally living with—
(a) the person who is receiving child benefit in respect of that child or young person, or
(b) if there is no such person—
   (i) where only one claim for child benefit has been made in respect of him, the
       person who made that claim, or
   (ii) in any other case the person who has the primary responsibility for him.

(3) For the purposes of this scheme a child or young person is the responsibility of only one
person in any support week and any person other than the one treated as responsible for
the child or young person under this paragraph is to be treated as not so responsible.

8.0 Households

(1) Subject to sub-paragraphs (2) and (3), an applicant and any partner and, where the
applicant or his partner is treated (by virtue of paragraph 7) as responsible for a child or
young person, that child or young person and any child of that child or young person, are
to be treated as members of the same household notwithstanding that any of them is
temporarily absent from that household.

(2) A child or young person is not be treated as a member of the applicant’s household where
he is—
(a) placed with the applicant or his partner by a local authority under section 22C or
   23(2)(a) of the Children Act 1989 or by a voluntary organisation under section
   59(1)(a) of that Act, or in Scotland boarded out with the applicant or his partner
   under a relevant enactment; or
(b) placed, or in Scotland boarded out, with the applicant or his partner prior to adoption; or
(c) placed for adoption with the applicant or his partner in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009 or the Adoption (Northern Ireland) Order 1987.

(3) Subject to sub-paragraph (4), sub-paragraph (1) does not apply to a child or young person who is not living with the applicant and who—
(a) is being looked after, or in Scotland is in the care of, a local authority under a relevant enactment; or
(b) has been placed, or in Scotland boarded out, with a person other than the applicant prior to adoption; or
(c) has been placed for adoption in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009.

(4) The authority must treat a child or young person to whom sub-paragraph (3)(a) applies as being a member of the applicant’s household in any support week where—
(a) that child or young person lives with the applicant for part or all of that support week; and
(b) the authority considers that it is reasonable to do so taking into account the nature and frequency of that child’s or young person’s visits.

(5) In this paragraph “relevant enactment” means:
(a) the Army Act 1955;
(b) the Air Force Act 1955;
(c) the Naval Discipline Act 1957;
(d) the Matrimonial Proceedings (Children) Act 1958;
(e) the Social Work (Scotland) Act 1968;
(f) the Family Law Reform Act 1969;
(g) the Children and Young Persons Act 1969;
(h) the Matrimonial Causes Act 1973;
(i) the Children Act 1975;
(j) the Domestic Proceedings and Magistrates’ Courts Act 1978;
(k) the Adoption and Children (Scotland) Act 2007;
(l) the Family Law Act 1986;
(m) the Children Act 1989;
(n) the Children (Scotland) Act 1995; and
(o) the Legal Aid, Sentencing and Punishment of Offenders Act 2012.

9.0 Non-dependants

(1) In this scheme, “non-dependant” means any person, except someone to whom sub-paragraph (2) applies, who normally resides with an applicant or with whom an applicant normally resides.

(2) This paragraph applies to—
(a) any member of the applicant’s family;
(b) if the applicant is polygamously married—
   (i) where the applicant has (alone or jointly with his partner) an award of universal credit, any:
      (aa) party to such a marriage other than the applicant’s partner; and
      (bb) any child or young person who is a member of his household and for whom he or his partner or another party to the polygamous marriage is responsible; or
   (ii) in any other case, any partner of his and any child or young person who is a member of his household and for whom he or one of his partners is responsible;
   (c) a child or young person who is living with the applicant but who is not a member of
his household by virtue of paragraph 8 (households);
(d) subject to sub-paragraph (3), any person who, with the applicant, is jointly and severely liable to pay council tax in respect of a dwelling for any day under section 6 or 7 of the 1992 Act (persons liable to pay council tax);
(e) subject to sub-paragraph (3), any person who is liable to make payments on a commercial basis to the applicant or the applicant’s partner in respect of the occupation of the dwelling;
(f) a person who lives with the applicant in order to care for him or a partner of his and who is engaged by a charitable or voluntary organisation which makes a charge to the applicant or his partner for the services provided by that person.

(3) Excepting persons to whom sub-paragraph (2)(a) to (c) and (f) refer, a person to whom any of the following paragraphs applies is a non-dependant:
(a) a person who resides with the person to whom he is liable to make payments in respect of the dwelling and either—
   (i) that person is a close relative of his or his partner; or
   (ii) the tenancy or other agreement between them is other than on a commercial basis;

(b) a person whose liability to make payments in respect of the dwelling appears to the authority to have been created to take advantage of a Council Tax Support scheme except someone who was, for any period within the eight weeks prior to the creation of the agreement giving rise to the liability to make such payments, otherwise liable to make payments of rent in respect of the same dwelling;

(c) a person who becomes jointly and severally liable with the applicant for council tax in respect of a dwelling and who was, at any time during the period of eight weeks prior to his becoming so liable, a non-dependant of one or more of the other residents in that dwelling who are so liable for the tax, unless the change giving rise to the new liability was not made to take advantage of a Council Tax Support scheme.

10.0 Remunerative work

(1) Subject to the following provisions of this paragraph, a person must be treated for the purposes of this scheme as engaged in remunerative work if he is engaged, or, where his hours of work fluctuate, he is engaged on average, for not less than 16 hours a week, in work for which payment is made or which is done in expectation of payment.

(2) Subject to sub-paragraph (3), in determining the number of hours for which a person is engaged in work where his hours of work fluctuate, regard must be had to the average of hours worked over

   (a) if there is a recognisable cycle of work, the period of one complete cycle (including, where the cycle involves periods in which the person does no work, those periods but disregarding any other absences);
   (b) in any other case, the period of 5 weeks immediately prior to the date of application, or such other length of time as may, in the particular case, enable the person’s weekly average hours of work to be determined more accurately.

(3) Where, for the purposes of sub-paragraph (2)(a), a person’s recognisable cycle of work at a school, other educational establishment or other place of employment is one year and includes periods of school holidays or similar vacations during which he does not work, those periods and any other periods not forming part of such holidays or vacations during which he is not required to work must be disregarded in establishing the average hours for which he is engaged in work.
(4) Where no recognisable cycle has been established in respect of a person's work, regard must be had to the number of hours or, where those hours will fluctuate, the average of the hours, which he is expected to work in a week.

(5) A person must be treated as engaged in remunerative work during any period for which he is absent from work referred to in sub-paragraph (1) if the absence is either without good cause or by reason of a recognised, customary or other holiday.

(6) A person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance for more than 3 days in any support week is to be treated as not being in remunerative work in that week.

(7) A person must not be treated as engaged in remunerative work on any day on which the person is on maternity leave, paternity leave or adoption leave, or is absent from work because he is ill.

(8) A person must not be treated as engaged in remunerative work on any day on which he is engaged in an activity in respect of which—
(a) a sports award has been made, or is to be made, to him; and
(b) no other payment is made or is expected to be made to him.
PART 3 Procedural Matters

11.0 Procedure for Council Tax Support applications and appeals against decisions

Schedule 1 contains provisions about the procedure
(a) by which a person may apply for support under this scheme;
(b) by which a person may make an appeal against certain decisions of the authority;
(c) by which a person can apply to the authority for support under section 13A(1)(c) of the 1992 Act.

PART 4 Classes of person entitled to support under this scheme

12.0 Classes of person entitled to Council Tax Support under this scheme

(1) The classes of person described in paragraphs 13 to 18 are entitled to support under this scheme.

(2) In those paragraphs, references to the applicant's income or capital include, in a case where that income or capital cannot accurately be determined, references to the applicant's estimated income or capital.

13.0 Class A: pensioners or lone parents with a child under 5 years of age whose income is less than the applicable amount

On any day class A consists of any person who is a pensioner or a lone parent with a child under 5 years of age
(a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
(b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
(c) in respect of whom a maximum Council Tax Support amount can be calculated;
(d) who does not fall within a class of person not entitled to support under this scheme;
(e) whose income (if any) for the relevant week does not exceed his applicable amount, and
(f) who has made an application.

14.0 Class B: pensioners or lone parents with a child under 5 years of age whose income is greater than the applicable amount

On any day class B consists of any person who is a pensioner or a lone parent with a child under 5 years of age
(a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
(b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
(c) in respect of whom a maximum Council Tax Support amount can be calculated;
(d) who does not fall within a class of person not entitled to support under this scheme;
(e) whose income for the relevant week is greater than his applicable amount;
(f) in respect of whom amount A exceeds amount B where—
(i) amount A is the maximum Council Tax Support in respect of the day in the applicant's case; and
(ii) amount B is 2 6/7 per cent of the difference between his income for the relevant week and his applicable amount, and
(g) who has made an application.
15.0 Class C: Alternative Maximum Council Tax Support – pensioners or lone parents with a child under 5 years of age

(1) On any day class C consists of any person who is a pensioner or a lone parent with a child under 5 years of age
(a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
(b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
(c) in respect of whom a maximum Council Tax Support amount can be calculated;
(d) who does not fall within a class of person not entitled to support under this scheme;
(e) who has made an application; and
(f) in relation to whom the condition in sub-paragraph (2) is met.

(2) The condition referred to in sub-paragraph (1)(f) is that no other resident of the dwelling is liable to pay rent to the applicant in respect of the dwelling and there is an Alternative Maximum Council Tax Support in respect of the day in the case of that person which is derived from the income, or aggregate incomes, of one or more residents to whom this sub-paragraph applies.

(3) Sub-paragraph (2) applies to any other resident of the dwelling who:
(a) is not a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount;
(b) is not a person who is liable for council tax solely in consequence of the provisions of section 9 of the 1992 Act (spouse’s or civil partner’s joint and several liability for tax);
(c) is not a person who is residing with a couple or with the members of a polygamous marriage where the applicant is a member of that couple or of that marriage and
(i) in the case of a couple, neither member of that couple is a person who, in accordance with Schedule 1 to the 1992 Act (persons disregarded for the purposes of discount), falls to be disregarded for the purposes of discount; or
(ii) in the case of a polygamous marriage, two or more members of that marriage are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount;
(d) is not a person who jointly with the applicant falls within the same paragraph of section 6(2)(a) to (e) of the 1992 Act (persons liable to pay council tax) as applies in the case of the applicant; or
(e) is not a person who is residing with two or more persons both or all of whom fall within the same paragraph of section 6(2)(a) to (e) of the 1992 Act where two or more of those persons are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount.

16.0 Class D: persons who are not pensioners or lone parents with a child under 5 years of age whose income is less than the applicable amount

On any day class D consists of any person who is not a pensioner or a lone parent with a child under 5 years of age:
(a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
(b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
(c) in respect of whom a maximum Council Tax Support amount can be calculated;
(d) who does not fall within a class of person not entitled to support under this scheme;
(e) whose income (if any) for the relevant week is less than his applicable amount, and
(f) who has made an application.
17. Class E: persons who are not pensioners or a lone parent with a child under 5 years of age whose income is greater than the applicable amount
On any day class E consists of any person who is not a pensioner or a lone parent with a child under 5 years of age:
(a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
(b) who, subject to paragraph 19 (periods of absence from a dwelling), is not absent from the dwelling throughout the day;
(c) in respect of whom a maximum Council Tax Support amount can be calculated;
(d) who does not fall within a class of person not entitled to support under this scheme;
(e) whose income for the relevant week is greater than his applicable amount;
(f) in respect of whom amount A exceeds amount B where—
(ii) amount B is 2 6/7 per cent of the difference between his income for the relevant week and his applicable amount, and
(g) who has made an application.

18.0 Class F: Alternative Maximum Council Tax Support – persons who are not pensioners or lone parents with a child under 5 years of age
On any day class F consists of any person who is not a pensioner or a lone parent with a child under 5 years of age:
(1) There shall be no entitlement to Alternative Maximum Council Tax Support.

19.0 Periods of absence from a dwelling
(1) A person is not absent from a dwelling in relation to any day which falls within a period of temporary absence from that dwelling.
(2) In sub-paragraph (1), a “period of temporary absence” means
(a) a period of absence not exceeding 13 weeks, beginning with the first whole day on which a person resides in residential accommodation where and for so long as—
(i) the person resides in that accommodation;
(ii) the part of the dwelling in which he usually resided is not let or sub-let; and
(iii) that period of absence does not form part of a longer period of absence from the dwelling of more than 52 weeks,
where he has entered the accommodation for the purpose of ascertaining whether it suits his needs and with the intention of returning to the dwelling if it proves not to suit his needs;
(b) a period of absence not exceeding 13 weeks, beginning with the first whole day of absence from the dwelling, where and for so long as:
(i) the person intends to return to the dwelling;
(ii) the part of the dwelling in which he usually resided is not let or sub-let; and
(iii) that period is unlikely to exceed 13 weeks; and
(c) a period of absence not exceeding 52 weeks, beginning with the first whole day of that absence, where and for so long as:
(i) the person intends to return to the dwelling;
(ii) the part of the dwelling in which he usually resided is not let or sub-let;
(iii) the person is a person to whom sub-paragraph (3) applies; and
(iv) the period of absence is unlikely to exceed 52 weeks or, in exceptional circumstances, is unlikely substantially to exceed that period.

(3) This sub-paragraph applies to a person who—
(a) is detained in custody on remand pending trial or required, as a condition of bail, to reside—
(i) in a dwelling, other than the dwelling referred to in sub-paragraph (1), or
(ii) in premises approved under section 13 of the Offender Management Act 2007, or is detained in custody pending sentence upon conviction;
(b) is resident in a hospital or similar institution as a patient;
(c) is undergoing, or whose partner or dependent child is undergoing, in the United
Kingdom or elsewhere, medical treatment, or medically approved convalescence, in
accommodation other than residential accommodation;
(d) is following, in the United Kingdom or elsewhere, a training course;
(e) is undertaking medically approved care of a person residing in the United Kingdom
or elsewhere;
(f) is undertaking the care of a child whose parent or guardian is temporarily absent
from the dwelling normally occupied by that parent or guardian for the purpose of
receiving medically approved care or medical treatment;
(g) is, in the United Kingdom or elsewhere, receiving medically approved care provided
in accommodation other than residential accommodation;
(h) is a student;
(i) is receiving care provided in residential accommodation and is not a person to whom
sub-paragraph (2)(a) applies; or
(j) has left the dwelling he resides in through fear of violence, in that dwelling, or by a
person who was formerly a member of the family of the person first mentioned.

(4) This sub-paragraph applies to a person who is
(a) detained in custody pending sentence upon conviction or under a sentence imposed
by a court (other than a person who is detained in hospital under the provisions of
the Mental Health Act 1983, or, in Scotland, under the provisions of the Mental
Health (Care and Treatment) (Scotland) Act 2003 or the Criminal Procedure
(Scotland) Act 1995 or, in Northern Ireland, under Article 4 or 12 of the Mental
Health (Northern Ireland) Order 1986); and
(b) on temporary release from detention in accordance with Rules made under the
provisions of the Prison Act 1952 or the Prisons (Scotland) Act 1989.

(5) Where sub-paragraph (4) applies to a person, then, for any day when he is on temporary
release—
(a) if such temporary release was immediately preceded by a period of temporary
absence under sub-paragraph (2)(b) or (c), he must be treated, for the purposes of
sub-paragraph (1), as if he continues to be absent from the dwelling, despite any
return to the dwelling;
(b) for the purposes of sub-paragraph (3)(a), he must be treated as if he remains in
detention;
(c) if he does not fall within paragraph (a), he is not to be considered to be a person
who is liable to pay council tax in respect of a dwelling of which he is a resident.

(6) In this paragraph—
“medically approved” means certified by a medical practitioner;
“patient” means a person who is undergoing medical or other treatment as an in-patient
in any hospital or similar institution;
“residential accommodation” means accommodation which is provided in
(a) a care home;
(b) an independent hospital;
(c) an Abbeyfield Home; or
(d) an establishment managed or provided by a body incorporated by Royal Charter or
constituted by Act of Parliament other than a local social services authority;
“training course” means a course of training or instruction provided wholly or partly by or
on behalf of or in pursuance of arrangements made with, or approved by or on behalf of,
Skills Development Scotland, Scottish Enterprise, Highlands and Islands Enterprise, a
government department or the Secretary of State.
PART 5 Classes of person excluded from this scheme

20.0 Classes of person excluded from this scheme
The classes of person described in paragraphs 21 to 24 are not entitled to support under this scheme.

21.0 Class of person excluded from this scheme: persons treated as not being in Great Britain
(1) The class of person described in this paragraph consists of any person treated as not being in Great Britain.

(2) Except where a person falls within sub-paragraph (5) or (6), a person is to be treated as not being in Great Britain if the person is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland.

(3) A person must not be treated as habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland unless the person has a right to reside in one of those places.

(4) For the purposes of sub-paragraph (3), a right to reside does not include a right which exists by virtue of, or in accordance with—
   (a) regulation 13 of the EEA Regulations or Article 6 of Council Directive No 2004/38/EC; or
   (b) regulation 15A(1) of the EEA Regulations, but only in a case where the right exists under that regulation because the applicant satisfies the criteria in paragraph (4A) of that regulation or Article 20 of the Treaty on the Functioning of the European Union (in a case where the right to reside arises because a British citizen would otherwise be deprived of the genuine enjoyment of their rights as a European Union citizen).

(5) A person falls within this sub-paragraph if the person is:
   (a) a qualified person for the purposes of regulation 6 of the EEA Regulations as a worker or a self-employed person;
   (b) a family member of a person referred to in paragraph (a) within the meaning of regulation 7(1)(a), (b) or (c) of the EEA Regulations;
   (c) a person who has a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of the EEA Regulations;
   (d) a person recorded by the Secretary of State as a refugee within the definition in Article 1 of the Convention relating to the Status of Refugees done at Geneva on 28th July 1951, as extended by Article 1(2) of the Protocol relating to the Status of Refugees done at New York on 31st January 1967;
   (e) a person granted limited leave to enter or remain in the United Kingdom outside the provisions of the rules made under section 3(2) of the Immigration Act 1971 on the rejection of their claim for asylum;
   (f) a person who has humanitarian protection granted under those rules; or
   (g) a person who is not a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999 and who is in the United Kingdom as a result of his deportation, expulsion or other removal by compulsion of law from another country to the United Kingdom.

(6) A person falls within this sub-paragraph if the person is a Crown servant or member of Her Majesty’s forces posted overseas.

(7) A person mentioned in sub-paragraph (6) is posted overseas if the person is performing overseas the duties of a Crown servant or member of Her Majesty’s forces and was, immediately before the posting or the first of consecutive postings, habitually resident in the United Kingdom.
(8) In this paragraph—
“claim for asylum” has the same meaning as in section 94(1) of the Immigration and Asylum Act 1999;
“EEA Regulations” means the Immigration (European Economic Area) Regulations 2006.

22.0 Class of person excluded from this scheme: persons subject to immigration control

(1) Persons subject to immigration control are not entitled to support under this scheme.

(2) “Person subject to immigration control” has the meaning given in section 115(9) of the Immigration and Asylum Act 1999.

23.0 Class of person excluded from this scheme: capital limit

(1) The class of person described in this paragraph consists of any person whose capital exceeds £16,000.

(2) Capital for the purposes of sub-paragraph (1) is to be calculated in accordance with Part 10 of this scheme.

24.0 Class of person excluded from this scheme: students

The class of person described in this paragraph consists of any student to whom paragraph 75(1) applies (except to the extent that a student may be entitled to an Alternative Maximum Council Tax Support by virtue of paragraph 18).

PART 6 Applicable Amounts

The amounts that will operate for the purposes of this Part will be subject to annual uprating, in line with Housing Benefit (General) Regulations 2006 and The Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012.

25.0 Applicable amounts: pensioners

(1) The applicable amount for a pensioner for a week is the aggregate of such of the following amounts as apply in his case—

(a) an amount in respect of his personal allowance, determined in accordance with paragraph 1 of Schedule 2 (personal allowance);

(b) an amount in respect of any child or young person who is a member of his family, determined in accordance with paragraph 2 of that Schedule (child or young person amounts);

(c) if he is a member of a family of which at least one member is a child or young person, an amount determined in accordance with paragraph 3 of that Schedule (family premium);

(d) the amount of any premiums which may be applicable to him, determined in accordance with Parts 3 and 4 of that Schedule ( premiums).

(2) In Schedule 2—

“additional spouse” means a spouse by the party to the marriage who is additional to the party to the marriage;

“patient” means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005.

26.0 Applicable amounts: persons who are not pensioners

(1) Subject to paragraphs 27 and 28, the applicable amount for a week for a person who is
not a pensioner is the aggregate of such of the following amounts as may apply in his case—
(a) an amount in respect of himself or, if he is a member of a couple, an amount in respect of both of them, determined in accordance with paragraph 1 of Schedule 3;
(b) an amount in respect of any child or young person who is a member of his family, determined in accordance with paragraph 3 of that Schedule;
(c) if he is a member of a family of which at least one member is a child or young person, an amount determined in accordance with Part 2 of that Schedule (family premium);
(d) the amount of any premiums which may be applicable to him, determined in accordance with Parts 3 and 4 of that Schedule (premiums);
(e) the amount of either the—
(i) work-related activity component; or
(ii) support component, which may be applicable to him in accordance with Parts 5 and 6 of that Schedule (the components);
(f) the amount of any transitional addition which may be applicable to him in accordance with Parts 7 and 8 of that Schedule (transitional addition).

(2) In Schedule 3—
“additional spouse” means a spouse by the party to the marriage who is additional to the party to the marriage;
“converted employment and support allowance” means an employment and support allowance which is not income-related and to which a person is entitled as a result of a conversion decision within the meaning of the Employment and Support Allowance (Existing Awards) Regulations 2008;
“patient” means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005.

27.0 Polygamous marriages: persons who are not pensioners
(1) This paragraph applies where an applicant who is not a pensioner is a member of a polygamous marriage and does not have (alone or jointly with a party to a marriage), an award of universal credit.
(2) The applicable amount for a week of an applicant where this paragraph applies is the aggregate of such of the following amounts as may apply in his case:
(a) the amount applicable to him and one of his partners determined in accordance with paragraph 1(3) of Schedule 3 as if he and that partner were a couple;
(b) an amount equal to the difference between the amounts specified in subparagraphs (3) and (1)(b) of that Schedule in respect of each of his other partners;
(c) an amount determined in accordance with paragraph 2 of that Schedule (main phase employment and support allowance) in respect of any child or young person for whom he or a partner of his is responsible and who is a member of the same household;
(d) if he or another partner of the polygamous marriage is responsible for a child or young person who is a member of the same household, the amount specified in Part 2 of that Schedule (family premium);
(e) the amount of any premiums which may be applicable to him determined in accordance with Parts 3 and 4 of that Schedule (premiums);
(f) the amount of either the—
(i) work-related activity component; or
(ii) support component, which may be applicable to him in accordance with Parts 5 and 6 of that Schedule (the components);
(g) the amount of any transitional addition which may be applicable to him in
accordance with Parts 7 and 8 of that Schedule (transitional addition).

28.0 Applicable amount: persons who are not pensioners who have an award of universal credit

(1) Subject to sub-paragraph (2), in determining the applicable amount for a week of an applicant who is not a pensioner:
   (a) who has, or
   (b) who (jointly with his partner) has,

   an award of universal credit, the authority must use the calculation or estimate of the maximum amount of the applicant, or the applicant and his partner jointly (as the case may be), subject to the adjustment described in sub-paragraph (3).

(2) In determining the applicable amount for a week of an applicant who is a member of a polygamous marriage, the fact that two people are husband and wife is to be disregarded if:
   (a) one of them is a party to an earlier marriage that still subsists; and
   (b) the other party to that earlier marriage is living in the same household.

(3) The adjustment referred to in sub-paragraph (1) is to multiply the maximum amount by 12 and divide the product by 52.

(4) In this paragraph “maximum amount” means the maximum amount calculated by the Secretary of State in accordance with section 8(2) of the Welfare Reform Act 2012.

PART 7 Maximum Council Tax Support for the purposes of calculating eligibility for support under this scheme and amount of support

29.0 Maximum Council Tax Support amount under this scheme: pensioners or lone parents with a child under 5 years of age

(1) Subject to sub-paragraphs (2) to (4), a person’s maximum Council Tax Support amount in respect of a day is 100 per cent of the amount A/B where:
   (a) A is the amount set by the authority as the council tax for the relevant financial year in respect of the dwelling in which he is a resident and for which he is liable, subject to any discount which may be appropriate to that dwelling under the 1992 Act; and
   (b) B is the number of days in that financial year,

   less any deductions in respect of non-dependants which fall to be made under paragraph 30 (non-dependant deductions: pensioners and persons who are not pensioners).

(2) In calculating a person’s maximum Council Tax Support under this scheme any reduction in the amount that person is liable to pay in respect of council tax, which is made in consequence of any enactment in, or made under, the 1992 Act (other than support under this Council Tax Support scheme), is to be taken into account.

(3) where a person’s daily award of Council Tax Support does not meet 100% of their council tax liability, the Council may consider a further award of Council Tax Support; (a) where the conditions in Schedule 11 are satisfied and
   (b) where in the Council’s opinion a person or persons would otherwise suffer extreme or exceptional hardship.

(4) Subject to sub-paragraph (5), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons, in determining the maximum Council Tax Support in his case in accordance with sub-
paragraph (1), the amount A is to be divided by the number of persons who are jointly and severally liable for that tax.

(5) Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, sub-paragraph (4) does not apply in his case.

(6) The reference in sub-paragraph (4) to a person with whom an applicant is jointly and severally liable for council tax, does not include a student to whom paragraph 75(1) (entitlement of students to support under this scheme) applies.

(7) In this paragraph “relevant financial year” means, in relation to any particular day, the financial year within which the day in question falls.

29A Maximum Council Tax Support amount under this scheme: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Subject to sub-paragraphs (2) to (5), a person’s maximum Council Tax Support amount in respect of a day is 85 per cent of the amount A/B where:

a) A is the amount set by the authority as the council tax for the relevant financial year in respect of the dwelling in which he is a resident and for which he is liable, restricted to an upper level of a band D property and subject to any discount which may be appropriate to that dwelling under the 1992 Act; and

b) B is the number of days in that financial year,

c) less any deductions in respect of non-dependants which fall to be made under paragraph 30A (non-dependant deductions: pensioners and persons who are not pensioners). For the purposes of this calculation, properties that fall within bands E to H shall, in paragraph (a) above, be treated as if in band D.

d) For claimants in receipt of a passported benefit the level of support will be reduced by a further 15% (to be applied after reducing A/B to 85%)

(2) In calculating a person’s maximum Council Tax Support under this scheme any reduction in the amount that person is liable to pay in respect of council tax, which is made in consequence of any enactment in, or made under, the 1992 Act (other than a support under this Council Tax Support scheme), is to be taken into account.

(3) where a person’s daily award of Council Tax Support does not meet 100% of their Council Tax liability, the Council may consider a further award of Council Tax Support; (a) where the conditions in Schedule 11 are satisfied and

(b) where in the Council’s opinion a person or persons would otherwise suffer extreme or exceptional hardship

(4) Subject to sub-paragraph (5), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons, in determining the maximum Council Tax Support in his case in accordance with sub-paragraph (1), the amount A is to be divided by the number of persons who are jointly and severally liable for that tax.

(5) Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, sub-paragraph (4) does not apply in his case.

(6) The reference in sub-paragraph (4) to a person with whom an applicant is jointly and severally liable for council tax, where the applicant is a person who is not a pensioner, does not include a student to whom paragraph 75(1) (entitlement of students to support under this scheme) applies.

(7) In this paragraph “relevant financial year” means, in relation to any particular day, the financial year within which the day in question falls.
30.0 Non-dependant deductions: pensioners and lone parents with a child under 5 years of age

The amounts that will operate for the purposes of this Part will be subject to annual uprating, in line with Housing Benefit (General) Regulations 2006 and The Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012.

(1) Subject to the following provisions of this paragraph, the non-dependant deductions in respect of a day referred to in paragraph 29 is —
   (a) in respect of a non-dependant aged 18 or over in remunerative work, £10.95 x 1/7;
   (b) in respect of a non-dependant aged 18 or over to whom paragraph (a) does not apply, £3.65 x 1/7.

(2) In the case of a non-dependant aged 18 or over to whom sub-paragraph (1)(a) applies, where it is shown to the appropriate authority that his normal gross weekly income is—
   (a) less than £186.00, the deduction to be made under this paragraph is that specified in sub-paragraph (1)(b);
   (b) not less than £186.00 but less than £322.00, the deduction to be made under this paragraph is £7.25;
   (c) not less than £322.00 but less than £401.00, the deduction to be made under this paragraph is £9.15.

(3) Only one deduction is to be made under this paragraph in respect of a couple or, as the case may be, members of a polygamous marriage (other than where there is an award of universal credit) and, where, but for this paragraph, the amount that would fall to be deducted in respect of one member of a couple or polygamous marriage is higher than the amount (if any) that would fall to be deducted in respect of the other, or any other, member, the higher amount is to be deducted.

(4) In applying the provisions of sub-paragraph (2) in the case of a couple or, as the case may be, a polygamous marriage, regard must be had, for the purpose of that sub-paragraph, to the couple’s or, as the case may be, all members of the polygamous marriage’s joint weekly gross income.

(5) Where in respect of a day—
   (a) a person is a resident in a dwelling but is not himself liable for council tax in respect of that dwelling and that day;
   (b) other residents in that dwelling (the liable persons) have joint and several liability for council tax in respect of that dwelling and that day otherwise than by virtue of section 9 of the 1992 Act (liability of spouses and civil partners); and
   (c) the person to whom paragraph (a) refers is a non-dependant of two or more of the liable persons,
   the deduction in respect of that non-dependant must be apportioned equally between those liable persons.

(6) No deduction is to be made in respect of any non-dependants occupying an applicant’s dwelling if the applicant or his partner is—
   (a) blind or treated as blind by virtue of paragraph 10 of Schedule 3 (additional condition for the disability premium); or
   (b) receiving in respect of himself—
      (i) attendance allowance, or would be receiving that allowance but for—
         (aa) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
         (bb) an abatement as a result of hospitalisation; or
      (ii) the care component of the disability living allowance, or would be receiving
that component but for—
(a) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
(bb) an abatement as a result of hospitalisation; or
(iii) the daily living component of personal independence payment, or would be receiving that allowance but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital inpatients); or
(iv) an AFIP, or would be receiving that payment but for a suspension of it in accordance with any terms of the armed and reserve forces compensation scheme which allows for a suspension because a person is undergoing medical treatment in a hospital or similar institution.

(7) No deduction is to be made in respect of a non-dependant if:
(a) although he resides with the applicant, it appears to the authority that his normal home is elsewhere; or
(b) he is in receipt of a training allowance paid in connection with youth training established under section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990; or
(c) he is a full-time student within the meaning of Part 11 (students); or
(d) he is not residing with the applicant because he has been a patient for a period in excess of 52 weeks, and for these purposes—
(i) “patient” has the meaning given in paragraph 19(6), and
(ii) where a person has been a patient for two or more distinct periods separated by one or more intervals each not exceeding 28 days, he is to be treated as having been a patient continuously for a period equal in duration to the total of those distinct periods.

(8) No deduction is to be made in respect of a non-dependant:
(a) who is on income support, state pension credit, an income-related jobseeker’s allowance or an income-related employment and support allowance; or
(b) to whom Schedule 1 to the 1992 Act applies (persons disregarded for purposes of discount) but this paragraph does not apply to a non-dependant who is a student to whom paragraph 4 of that Schedule refers.

(9) In the application of sub-paragraph (2) there is to be disregarded from the non-dependant’s weekly gross income:
(a) any attendance allowance, disability living allowance, personal independence payment or an AFIP received by him;
(b) any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006) which, had his income fallen to be calculated under paragraph 54 (calculation of income other than earnings: persons who are not pensioners), would have been disregarded under paragraph 28 of Schedule 8 (income in kind); and
(c) any payment which, had his income fallen to be calculated under paragraph 54, would have been disregarded under paragraph 41 of Schedule 8 (payments made under certain trusts and certain other payments).

30A Non-dependant deductions: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Subject to the following provisions of this paragraph, the non-dependant deductions in respect of a day referred to in paragraph 29A are—
(a) in respect of a non-dependant aged 18 or over, £5.00 x 1/7;

(2) Only one deduction is to be made under this paragraph in respect of a couple or, as the case may be, members of a polygamous marriage (other than where there is an award of
universal credit) and, where, but for this paragraph, the amount that would fall to be deducted in respect of one member of a couple or polygamous marriage is higher than the amount (if any) that would fall to be deducted in respect of the other, or any other member, the higher amount is to be deducted.

(3) Where in respect of a day—
(a) a person is a resident in a dwelling but is not himself liable for council tax in respect of that dwelling and that day;
(b) other residents in that dwelling (the liable persons) have joint and several liability for council tax in respect of that dwelling and that day otherwise than by virtue of section 9 of the 1992 Act (liability of spouses and civil partners); and
(c) the person to whom paragraph (a) refers is a non-dependant of two or more of the liable persons,
the deduction in respect of that non-dependant must be apportioned equally between those liable persons.

(4) No deduction is to be made in respect of any non-dependants occupying an applicant’s dwelling if the applicant or his partner is—
(a) blind or treated as blind by virtue of paragraph 10 of Schedule 3 (additional condition for the disability premium); or
(b) receiving in respect of himself—
(i) attendance allowance, or would be receiving that allowance but for—
(aa) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
(bb) an abatement as a result of hospitalisation; or
(ii) the care component of the disability living allowance, or would be receiving that component but for—
(aa) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or
(bb) an abatement as a result of hospitalisation; or
(iii) the daily living component of personal independence payment, or would be receiving that allowance but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients); or
(iv) an AFIP, or would be receiving that payment but for a suspension of it in accordance with any terms of the armed and reserve forces compensation scheme which allows for a suspension because a person is undergoing medical treatment in a hospital or similar institution.

(5) No deduction is to be made in respect of a non-dependant if:
(a) although he resides with the applicant, it appears to the authority that his normal home is elsewhere; or
(b) he is in receipt of a training allowance paid in connection with youth training established under section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990; or
(c) he is a full-time student within the meaning of Part 11 (students); or
(d) he is not residing with the applicant because he has been a patient for a period in excess of 52 weeks, and for these purposes—
(i) “patient” has the meaning given in paragraph 19(6), and
(ii) where a person has been a patient for two or more distinct periods separated by one or more intervals each not exceeding 28 days, he is to be treated as having been a patient continuously for a period equal in duration to the total of those distinct periods.

(6) No deduction is to be made in respect of a non-dependant:
(a) to whom Schedule 1 to the 1992 Act applies (persons disregarded for purposes of discount) but this paragraph does not apply to a non-dependant who is a student to
PART 8 Alternative Maximum Council Tax Support for the purposes of calculating eligibility for support under this scheme and amount of support

31.0 Alternative Maximum Council Tax Support under this scheme: pensioners and lone parents with a child under 5 years of age

(1) Subject to sub-paragraphs (2) and (3), the Alternative Maximum Council Tax Support in respect of a day where the conditions set out in paragraph 15 (Alternative Maximum Council Tax Support: pensioners and lone parents with a child under 5 years of age) is fulfilled, is the amount determined in accordance with Schedule 4 (amount of Alternative Council Tax Support).

(2) Subject to sub-paragraph (3), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons, in determining the Alternative Maximum Council Tax Support in his case, the amount determined in accordance with Schedule 4 must be divided by the number of persons who are jointly and severally liable for that tax.

(3) Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, solely by virtue of section 9 of the 1992 Act (liability of spouses and civil partners), sub-paragraph (2) does not apply in his case.

PART 9 Amount of support under this scheme

32.0— Amount of support under this scheme: Classes A to E

(1) Where a person is entitled to support under this scheme in respect of a day, the amount of Council Tax Support to which he is entitled as stated under Part 7 is as follows.

(2) Where the person is within class A or D, that amount is the maximum Council Tax Support in respect of the day in the applicant’s case.

(3) Where the person is within class B or E, that amount is the amount in the applicant’s case found by deducting amount B from amount A, where “amount A” and “amount B” have the meanings given in paragraph 14(f) or 17(f), as the case may be.

(4) Where the person is within class C, that amount is the amount which is the Alternative Maximum Council Tax Support in respect of the day in the applicant’s case.

(5) Sub-paragraph (6) applies where both:
   (a) sub-paragraph (2) or sub-paragraph (3), and
   (b) sub-paragraph (4),
apply to a person.

(6) The amount of support to which the person is entitled is whichever is the greater of:
   (a) the amount of support given by sub-paragraph (2) or sub-paragraph (3), as the case may be, and
   (b) the amount of support given by sub-paragraph (4).
PART 10 Income and capital for the purposes of calculating eligibility for support under this scheme and amount of support

CHAPTER 1 Income and capital: general

33.0 Calculation of income and capital: applicant's family and polygamous marriages

(1) The income and capital of—
   (a) an applicant; and
   (b) any partner of that applicant,
   is to be calculated in accordance with the provisions of this Part.

(2) The income and capital of any partner of the applicant is to be treated as income and capital of the applicant, and in this Part any reference to the applicant applies equally to any partner of that applicant.

(3) Except where paragraph 37 applies, where an applicant or the partner of an applicant is married polygamously to two or more members of his household—
   (a) the applicant must be treated as possessing capital and income belonging to each such member; and
   (b) the income and capital of that member is to be calculated in accordance with the following provisions of this Part in like manner as for the applicant.

34.0 Circumstances in which income and capital of non-depandant is to be treated as applicant's

(1) Sub-paragraph (2) applies where it appears to the authority that a non-depandant and an applicant have entered into arrangements in order to take advantage of this scheme and the non-depandant has more income and capital than the applicant.

(2) Except where—
   (a) the applicant is a pensioner and is on a guarantee credit, or
   (b) the applicant is not a pensioner and is on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance,

   the authority must treat the applicant as possessing income and capital belonging to that non-depandant and, in such a case, any income and capital which the applicant does possess is to be disregarded.

(3) Where an applicant is treated as possessing income and capital belonging to a non-depandant under sub-paragraph (2) the income and capital of that non-depandant must be calculated in accordance with the following provisions of this Part in like manner as for the applicant and, except where the context otherwise requires, any reference to the “applicant” is to be construed for the purposes of this Part as if it were a reference to that non-depandant.

CHAPTER 2 Income and capital: pensioners in receipt of guarantee credit or savings credit

35.0 Applicant in receipt of guarantee credit: pensioners

In the case of an applicant who is a pensioner and who is in receipt, or whose partner is in receipt, of a guarantee credit, the whole of his capital and income must be disregarded.

36.0 Calculation of applicant's income and capital in savings credit only cases: pensioners

(1) In determining the income and capital of an applicant who is a pensioner and who has, or whose partner has, an award of state pension credit comprising only the savings credit,
subject to the following provisions of this paragraph, the authority must use the
calculation or estimate of the applicant's or as the case may be, the applicant's partner's
income and capital made by the Secretary of State for the purpose of determining the
award of state pension credit.

(2) Where the calculation or estimate provided by the Secretary of State includes the amount
taken into account in that determination in respect of net income, the authority may only
adjust that amount so far as necessary to take into account—
(a) the amount of any savings credit payable;
(b) in respect of any dependent children of the applicant, child care charges taken into
account under paragraph 57(1)(c) (calculation of income on a weekly basis);
(c) the higher amount disregarded under this scheme in respect of—
(i) lone parent's earnings; or
(ii) payments of maintenance, whether under a court order or not, which is made
or due to be made by
(aa) the applicant's former partner, or the applicant's partner's former
partner; or
(bb) the parent of a child or young person where that child or young person
is a member of the applicant's family except where that parent is the
applicant or the applicant's partner;
(d) any amount to be disregarded by virtue of paragraph 10(1) of Schedule 5 (sums
disregarded from applicant's earnings: pensioners);
(e) the income and capital of any partner of the applicant who is treated as a member
of the applicant's household under paragraph 8, to the extent that it is not taken
into account in determining the net income of the person claiming state pension
credit;
(f) paragraph 34 (circumstances in which capital and income of a non-dependant is to
be treated as applicant's), if the authority determines that that provision applies in
the applicant's case;
(g) such further reduction (if any) as the authority thinks fit under section 13A(1)(c) of
the 1992 Act (power of billing authority to reduce amount of council tax payable);
(h) any amount to be disregarded by virtue of paragraph 6 of Schedule 5 (exempt
work).

(3) Paragraphs 39 to 46 (calculation of income: pensioners) and 57 to 61 (calculation of
income: pensioners and persons who are not pensioners) do not apply to the amount of
the net income to be taken into account under sub-paragraph (1), but do apply (so far as
relevant) for the purpose of determining any adjustments to that amount which the
authority makes under sub-paragraph (2).

(4) If sub-paragraph (5) applies, the authority must calculate the applicant's capital in
accordance with paragraphs 63, 65 to 68 and 70 (calculation of capital: pensioners).

(5) This sub-paragraph applies if:
(a) the Secretary of State notifies the authority that the applicant's capital has been
determined as being £16,000 or less or the authority determines his capital as being
£16,000 or less;
(b) subsequent to that determination the applicant's capital rises to more than
£16,000; and
(c) the increase occurs whilst there is in force an assessed income period within the
meaning of sections 6 and 9 of the State Pension Credit Act 2002.
CHAPTER 3 Income and capital where there is an award of universal credit

37.0 Calculation of income and capital: persons who are not pensioners who have an award of universal credit

(1) In determining the income of an applicant:
   (a) who has, or
   (b) who (jointly with his partner) has,
   an award of universal credit the authority must, subject to the following provisions of this paragraph, use the calculation or estimate of the amount of the income of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit.

(2) The authority must adjust the amount of the income referred to in sub-paragraph (1) by multiplying the amount by 12 and dividing the product by 52.

(3) The authority may only adjust the amount of the income as adjusted in accordance with sub-paragraph (2) so far as necessary to take into account—
   (a) the amount of the award of universal credit, determined in accordance with sub-paragraph (3);
   (b) paragraph 34 (circumstances in which income and capital of non-dependant is to be treated as applicant’s), if the authority determines that the provision applies in the applicant’s case;
   (c) such further reduction (if any) as the authority thinks fit under section 13A(1)(c) of the 1992 Act (power of billing authority to reduce amount of council tax payable).

(4) The amount for the award of universal credit to be taken into account for the purposes of sub-paragraph (3)(a) is to be determined by multiplying the amount of the award of universal credit by 12 and dividing the product by 52.

(5) Paragraph 34 (income and capital of non-dependant to be treated as applicant’s) applies for the purpose of determining any adjustments which fall to be made to the figure for income under sub-paragraph (3).

(6) In determining the capital of an applicant—
   (a) who has, or
   (b) who (jointly with his partner) has,
   an award of universal credit, the authority must use the calculation or estimate of the capital of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit.

CHAPTER 4 Income: other pensioners

38.0 Calculation of income and capital where state pension credit is not payable: pensioners

Where neither paragraph 35 (applicant in receipt of guarantee credit: pensioners) nor 36 (applicant in receipt of savings credit only: pensioners) applies in the applicant’s case, his income and capital is to be calculated or estimated in accordance with paragraphs 39 to 46 and 57 to 62 (calculation of income) and Chapter 7 of this Part (calculation of capital).

39.0 Meaning of “income”: pensioners

(1) For the purposes of classes A to C in this scheme, “income” means income of any of the following descriptions:
   (a) earnings;
   (b) working tax credit;
(c) retirement pension income within the meaning of the State Pension Credit Act 2002;
(d) income from annuity contracts (other than retirement pension income);
(e) a war disablement pension or war widow's or widower's pension;
(f) a foreign war disablement pension or war widow's or widower's pension;
(g) a guaranteed income payment;
(h) a payment made under article 29(1)(c) of the Armed Forces and Reserve Forces
   (Compensation Scheme) Order 2011, in any case where article 31(2)(c) applies;
(i) income from capital other than capital disregarded under Part 1 of Schedule 9;
(j) social security benefits, other than retirement pension income or any of the
   following benefits:
   (i) disability living allowance;
   (ii) personal independence payment;
   (iii) an AFIP;
   (iv) attendance allowance payable under section 64 of the SSCBA (entitlement to
       attendance allowance);
   (v) an increase of disablement pension under section 104 (increase for constant
       attendance) or 105 of that Act (increase for exceptionally severe disablement);
   (vi) child benefit;
   (vii) any guardian's allowance payable under section 77 of the SSCBA (guardian's
       allowance);
   (viii) any increase for a dependant, other than the applicant's partner, payable in
       accordance with Part 4 of that Act (increases for dependants);
   (ix) any:
      (aa) social fund payment made under Part 8 of the SSCBA (the social
           fund), or
      (bb) occasional assistance;
   (x) Christmas bonus payable under Part 10 of that Act (Christmas bonus for
       pensioners);
   (xi) housing benefit;
   (xii) council tax support;
   (xiii) bereavement payment;
   (xiv) statutory sick pay;
   (xv) statutory maternity pay;
   (xvi) ordinary statutory maternity pay payable under Part 12ZA of the SSCBA;
   (xvii) additional statutory maternity pay payable under Part 12ZA of the SSCBA;
   (xviii) statutory adoption pay payable under Part 12ZB of that Act (statutory
       adoption pay);
   (xix) any benefit similar to those mentioned in the preceding provisions of this
       paragraph payable under legislation having effect in Northern Ireland;
   (k) all foreign social security benefits which are similar to the social security benefits
       mentioned above;
   (l) a payment made:
      (i) under article 30 of the Naval, Military and Air Forces Etc. (Disablement and
          Death) Service Pensions Order 2006 (award for children who have reached the
          child's age limit), in any case where article 30(1)(b) applies; or
      (ii) under article 12(8) of that Order (unemployability allowances: children who
          have reached the child's age limit), in any case where sub-paragraph (b) of that
          article applies;
   (m) a pension paid to victims of National Socialist persecution under any special
       provision made by the law of the Federal Republic of Germany, or any part of it, or
       of the Republic of Austria;
   (n) payments under a scheme made under the Pneumoconiosis etc. (Worker's
       Compensation) Act 1979;
   (o) payments made towards the maintenance of the applicant by his spouse, civil
       partner, former spouse or former civil partner or towards the maintenance of the
       applicant's partner by his spouse, civil partner, former spouse or former civil
partner, including payments made—
(i) under a court order;
(ii) under an agreement for maintenance; or
(iii) voluntarily;
(p) payments due from any person in respect of board and lodging accommodation provided by the applicant;
(q) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark;
(r) any payment in respect of any—
(i) book registered under the Public Lending Right Scheme 1982; or
(ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982;
(s) any payment, other than a payment ordered by a court or made in settlement of a claim, made by or on behalf of a former employer of a person on account of the early retirement of that person on grounds of ill-health or disability;
(t) any sum payable by way of pension out of money provided under—
(i) the Civil List Act 1837,
(ii) the Civil List Act 1937,
(iii) the Civil List Act 1952,
(iv) the Civil List Act 1972, or
(v) the Civil List Act 1975;
(u) any income in lieu of that specified in paragraphs (a) to (r);
(v) any payment of rent made to an applicant who:
(i) owns the freehold or leasehold interest in any property or is a tenant of any property;
(ii) occupies part of the property; and
(iii) has an agreement with another person allowing that person to occupy that property on payment of rent;
(w) any payment made at regular intervals under an equity release scheme;
(x) PPF periodic payments within the meaning of section 17(1) of the State Pension Credit Act 2002.

(2) Where the payment of any social security benefit referred to in sub-paragraph (1) is subject to any deduction (other than an adjustment specified in sub-paragraph (4)) the amount to be taken into account under sub-paragraph (1) is to be the amount before the deduction is made.

(3) Where an award of any working tax credit or child tax credit is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account under sub-paragraph (1) is to be the amount of working tax credit or child tax credit awarded less the amount of that deduction.

(4) The adjustments specified in this sub-paragraph are those made in accordance with—
(a) the Social Security (Overlapping Benefits) Regulations 1979;
(b) the Social Security (Hospital In-Patients) Regulations 1975;
(c) section 30DD or section 30E of the SSCBA (reductions in incapacity benefit in respect of pensions and councillor’s allowances);
(d) section 3 of the Welfare Reform Act 2007 (deductions from contributory employment and support allowance in respect of pensions and councillor’s allowances) and regulations made under it.

(5) In sub-paragraph (1)(w), “equity release scheme” means a loan:
(a) made between a person (“the lender”) and the applicant;
(b) by means of which a sum of money is advanced by the lender to the applicant by way of payments at regular intervals; and
(c) which is secured on a dwelling in which the applicant owns an estate or interest and
which he occupies as his home.

40.0 Calculation of weekly income: pensioners and lone parents with a child under 5 years of age

(1) Except in a case within sub-paragraph (2) or (4), for the purposes of calculating the weekly income of an applicant who is a pensioner or a lone parent with a child under 5 years of age, where the period in respect of which a payment is made:
   (a) does not exceed a week, the whole of that payment is to be included in the applicant’s weekly income;
   (b) exceeds a week, the amount to be included in the applicant’s weekly income is to be determined:
      (i) in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;
      (ii) in a case where that period is three months, by multiplying the amount of the payment by 4 and dividing the product by 52;
      (iii) in a case where that period is a year, by dividing the amount of the payment by 52;
      (iv) in any other case, by multiplying the amount of the payment by 7 and dividing the product by the number of days in the period in respect of which it is made.

(2) Sub-paragraph (3) applies where:
   (a) the applicant’s regular pattern of work is such that he does not work the same hours every week; or
   (b) the amount of the applicant’s income fluctuates and has changed more than once.

(3) The weekly amount of that applicant’s income is to be determined:
   (a) if, in a case to which sub-paragraph (2)(a) applies, there is a recognised cycle of work, by reference to his average weekly income over the period of the complete cycle (including, where the cycle involves periods in which the applicant does no work, those periods but disregarding any other absences); or
   (b) in any other case, on the basis of:
      (i) the last two payments if those payments are one month or more apart;
      (ii) the last four payments if the last two payments are less than one month apart; or
      (iii) calculating or estimating such other payments as may, in the particular circumstances of the case, enable the applicant’s average weekly income to be determined more accurately.

(4) For the purposes of sub-paragraph (3)(b) the last payments are the last payments before the date the application was made or treated as made.

(5) If the applicant is entitled to receive a payment to which sub-paragraph (6) applies, the amount of that payment is to be treated as if made in respect of a period of a year.

(6) This sub-paragraph applies to:
   (a) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark;
   (b) any payment in respect of any:
      (i) book registered under the Public Lending Right Scheme 1982; or
      (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982; and
   (c) any payment which is made on an occasional basis.

(7) The period under which any benefit under the benefit Acts is to be taken into account is to be the period in respect of which that benefit is payable.

(8) Where payments are made in a currency other than Sterling, the value of the payment is
to be determined by taking the Sterling equivalent on the date the payment is made.

(9) The sums specified in Schedule 5 are to be disregarded in calculating—
(a) the applicant’s earnings; and
(b) any amount to which sub-paragraph (6) applies where the applicant is the first owner of the copyright, design, patent or trademark, or an original contributor to the book or work referred to in sub-paragraph (6)(b).

(10) For the purposes of sub-paragraph (9)(b), and for that purpose only, the amounts specified in sub-paragraph (6) is to be treated as though they were earnings.

(11) Income specified in Schedule 6 is to be disregarded in the calculation of the applicant’s income.

(12) Schedule 9 (capital disregards: pensioners) has effect so that
(a) the capital specified in Part 1 is disregarded for the purpose of determining an applicant’s income; and
(b) the capital specified in Part 2 is disregarded for the purpose of determining an applicant’s income under paragraph 71 (calculation of tariff income from capital: pensioners).

(13) In the case of any income taken into account for the purpose of calculating a person’s income any amount payable by way of tax is disregarded.

41.0 Earnings of employed earners: pensioners and lone parents with a child under 5 years of age

(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as an employed earner who is a pensioner or a lone parent with a child under 5 years of age, means any remuneration or profit derived from that employment and includes
(a) any bonus or commission;
(b) any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;
(c) any payment in lieu of notice;
(d) any holiday pay;
(e) any payment by way of a retainer;
(f) any payment made by the applicant’s employer in respect of expenses not wholly, exclusively and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant’s employer in respect of—
(i) travelling expenses incurred by the applicant between his home and place of employment;
(ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant’s absence from home;
(g) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person’s earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001;
(h) statutory sick pay and statutory maternity pay payable by the employer under the SSCBA;
(i) statutory paternity pay payable under Part 12ZA of that Act;
(j) statutory adoption pay payable under Part 12ZB of that Act;
(k) any sums payable under a contract of service—
(i) for incapacity for work due to sickness or injury; or
(ii) by reason of pregnancy or confinement.

(2) Earnings does not include—
(a) subject to sub-paragraph (3), any payment in kind;
(b) any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment;
(c) any occupational pension;
(d) any lump sum payment made under the Iron and Steel Re-adaptation Benefits Scheme;
(e) any payment of compensation made pursuant to an award by an employment tribunal established under the Employment Tribunals Act 1996 in respect of unfair dismissal or unlawful discrimination;
(f) any payment in respect of expenses arising out of the applicant's participation in a service user group.

(3) Sub-paragraph (2)(a) does not apply in respect of any non-cash voucher referred to in sub-paragraph (1)(g).

42.0 Calculation of net earnings of employed earners: pensioners and lone parents with a child under 5 years of age

(1) For the purposes of paragraph 57 (calculation of income on a weekly basis), the earnings of an applicant who is a pensioner or a lone parent with a child under 5 years of age derived or likely to be derived from employment as an employed earner to be taken into account must, subject to paragraph 40(5) and Schedule 5 (sums to be disregarded from earnings: pensioners and lone parents with a child under 5 years of age), be his net earnings.

(2) For the purposes of sub-paragraph (1) net earnings must, except where sub-paragraph (5) applies, be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less—
(a) any amount deducted from those earnings by way of:
   (i) income tax;
   (ii) primary Class 1 contributions under the SSCBA;
(b) one-half of any sum paid by the applicant by way of a contribution towards an occupational pension scheme;
(c) one-half of the amount calculated in accordance with sub-paragraph (4) in respect of any qualifying contribution payable by the applicant; and
(d) where those earnings include a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay, statutory maternity pay, ordinary or additional statutory paternity pay or statutory adoption pay, any amount deducted from those earnings by way of any contributions which are payable under any enactment having effect in Northern Ireland and which correspond to primary Class 1 contributions under the SSCBA.

(3) In this paragraph “qualifying contribution” means any sum which is payable periodically as a contribution towards a personal pension scheme.

(4) The amount in respect of any qualifying contribution is to be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying contribution is to be determined—
(a) where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365 or 366 in a leap year;
(b) in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.

(5) Where the earnings of an applicant are determined under paragraph 40(2)(b) (calculation of weekly income: pensioners and lone parents with a child under 5 years of age) his net earnings is to be calculated by taking into account those earnings over the assessment period, less:
(a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances but, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph is to be calculated on a pro rata basis;
(b) an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the SSCBA in respect of those earnings if such contributions were payable; and
(c) one-half of any sum which would be payable by the applicant by way of a contribution towards an occupational or personal pension scheme, if the earnings so estimated were actual earnings.

43.0 Calculation of earnings of self-employed earners: pensioners and lone parents with a child under 5 years of age

(1) Where the earnings of an applicant who is a pensioner or a lone parent with a child under 5 years of age consist of earnings from employment as a self-employed earner, the weekly amount of his earnings is to be determined by reference to his average weekly earnings from that employment:
   (a) over a period of one year; or
   (b) where the applicant has recently become engaged in that employment or there has been a change which is likely to affect the normal pattern of business, over such other period (“computation period”) as may, in the particular case, enable the weekly amount of his earnings to be determined more accurately.

(2) For the purposes of determining the weekly amount of earnings of an applicant to whom sub-paragraph (1)(b) applies, his earnings over the computation period are to be divided by the number equal to the number of days in that period and the product multiplied by 7.

(3) The period over which the weekly amount of an applicant’s earnings is calculated in accordance with this paragraph is to be his assessment period.

44.0 Earnings of self-employers earners: pensioners and lone parents with a child under 5 years of age

(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as a self-employed earner who is a pensioner or a lone parent with a child under 5 years of age, means the gross income of the employment.

(2) “Earnings” in the case of employment as a self-employed earner does not include:
   (a) where an applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation for which payment is made, those payments;
   (b) any payment made by a local authority to an applicant—
      (i) with whom a person is accommodated by virtue of arrangements made under section 22C or 23(2)(a) of the Children Act 1989 or, as the case may be, section 26(1) of the Children (Scotland) Act 1995; or
      (ii) with whom a local authority fosters a child under the Looked After Children (Scotland) Regulations 2009 or who is a kinship carer under those Regulations;
   (c) any payment made by a voluntary organisation in accordance with section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations);
   (d) any payment made to the applicant or his partner for a person (“the person concerned”) who is not normally a member of the applicant’s household but is temporarily in his care, by—
      (i) a local authority but excluding payments of housing benefit made in respect of
the person concerned;
(ii) a voluntary organisation;
(iii) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;
(iv) the National Health Service Commissioning Board or a clinical commissioning group established under section 14D of the National Health Service Act 2006;
or
(v) a Local Health Board established under section 11 of the National Health Service (Wales) Act 2006;
(e) any sports award.

45.0 Notional income: pensioners

(1) An applicant who is a pensioner is to be treated as possessing:
(a) subject to sub-paragraph (2), the amount of any retirement pension income—
(i) for which no claim has been made; and
(ii) to which he might expect to be entitled if a claim for it were made;
(b) income from an occupational pension scheme which the applicant elected to defer.

(2) Sub-paragraph (1)(a) does not apply to the following where entitlement has been deferred—
(a) a Category A or Category B retirement pension payable under sections 43 to 55 of the SSCBA;
(b) a shared additional pension payable under section 55A of the SSCBA;
(c) graduated retirement benefit payable under sections 36 and 37 of the National Insurance Act 1965.

(3) For the purposes of sub-paragraph (2), entitlement has been deferred—
(a) in the case of a Category A or Category B pension, in the circumstances specified in section 55(3) of the SSCBA;
(b) in the case of a shared additional pension, in the circumstances specified in section 55C(3) of the SSCBA; and
(c) in the case of graduated retirement benefit, in the circumstances specified in section 36(4) and (4A) of the National Insurance Act 1965.

(4) This sub-paragraph applies where a person who has attained the qualifying age for state pension credit:
(a) is entitled to money purchase benefits under an occupational pension scheme or a personal pension scheme;
(b) fails to purchase an annuity with the funds available in that scheme; and
(c) either—
(i) defers in whole or in part the payment of any income which would have been payable to him by his pension fund holder, or
(ii) fails to take any necessary action to secure that the whole of any income which would be payable to him by his pension fund holder upon his applying for it, is so paid, or
(iii) income withdrawal is not available to him under that scheme.

(5) Where sub-paragraph (4) applies, the amount of any income foregone is to be treated as possessed by that person, but only from the date on which it could be expected to be acquired were an application for it to be made.

(6) The amount of any income foregone in a case where sub-paragraph (4)(c)(i) or (ii) applies is to be the maximum amount of income which may be withdrawn from the fund and must be determined by the authority, taking account of information provided by the pension fund holder.
(7) The amount of any income foregone in a case where sub-paragraph (4)(c)(iii) applies is to be the income that the applicant could have received without purchasing an annuity had the funds held under the relevant scheme been held under a personal pension scheme or occupational pension scheme where income withdrawal was available and is to be determined in the manner specified in sub-paragraph (6).

(8) In sub-paragraph (4), “money purchase benefits” has the same meaning as in the Pension Schemes Act 1993.

(9) Subject to sub-paragraphs (10) and (12), a person is to be treated as possessing income of which he has deprived himself for the purpose of securing entitlement to support under this scheme or increasing the amount of the support.

(10) Sub-paragraph (9) does not apply in respect of the amount of an increase of pension or benefit where a person, having made an election in favour of that increase of pension or benefit under Schedule 5 or 5A to the SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005, changes that election in accordance with regulations made under Schedule 5 or 5A to that Act in favour of a lump sum.

(11) In sub-paragraph (10), “lump sum” means a lump sum under Schedule 5 or 5A to the SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005.

(12) Sub-paragraph (9) does not apply in respect of any amount of income other than earnings, or earnings of an employed earner, arising out of the applicant's participation in a service user group.

(13) Where an applicant is in receipt of any benefit under the benefit Acts and the rate of that benefit is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter, the authority must treat the applicant as possessing such benefit at the altered rate from either 1st April or the first Monday in April in that year, whichever date the authority selects to apply, to the date on which the altered rate is to take effect.

(14) In the case of an applicant who has, or whose partner has, an award of state pension credit comprising only the savings credit, where the authority treats the applicant as possessing any benefit at the altered rate in accordance with sub-paragraph (13), the authority must—

(a) determine the income and capital of that applicant in accordance with paragraph 36(1) (calculation of applicant’s income in savings credit only cases: pensioners) where the calculation or estimate of that income and capital is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter; and

(b) treat that applicant as possessing such income and capital at the altered rate by reference to the date selected by the relevant authority to apply in its area, for the purposes of establishing the period referred to in sub-paragraph (13).

(15) For the purposes of sub-paragraph (9), a person is not to be regarded as depriving himself of income where:

(a) his rights to benefits under a registered pension scheme are extinguished and in consequence of this he receives a payment from the scheme, and

(b) that payment is a trivial commutation lump sum within the meaning given by paragraph 7 of Schedule 29 to the Finance Act 2004.

(16) In sub-paragraph (15), “registered pension scheme” has the meaning given in section 150(2) of the Finance Act 2004.
46.0 Income paid to third parties: pensioners or lone parents with a child under 5 years of age

(1) Any payment of income, other than a payment specified in sub-paragraph (2) or (3), to a third party in respect of an applicant who is a pensioner or a lone parent with a child under 5 years of age is to be treated as possessed by the applicant.

(2) Sub-paragraph (1) does not apply in respect of a payment of income made under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
(a) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person’s estate under section 41 of the Solicitors (Scotland) Act 1980;
(b) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
(c) the person referred to in paragraph (a) and his partner does not possess, or is not treated as possessing, any other income apart from that payment.

(3) Sub-paragraph (1) does not apply in respect of any payment of income other than earnings, or earnings derived from employment as an employed earner, arising out of the applicant’s participation in a service user group.

CHAPTER 5 Income: persons who are not pensioners or lone parents with a child under 5 years of age

47.0 Average weekly earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Where the income of an applicant who is not a pensioner or a lone parent with a child under 5 years of age consists of earnings from employment as an employed earner his average weekly earnings must be estimated by reference to his earnings from that employment—
(a) over a period immediately preceding the support week in which the application is made or treated as made and being a period of—
(i) 5 weeks, if he is paid weekly; or
(ii) 2 months, if he is paid monthly; or
(b) whether or not paragraph (a)(i) or (ii) applies, where an applicant’s earnings fluctuate, over such other period preceding the support week in which the application is made or treated as made as may, in any particular case, enable his average weekly earnings to be estimated more accurately.

(2) Where the applicant has been in his employment for less than the period specified in sub-paragraph (1)(a)(i) or (ii)—
(a) if he has received any earnings for the period that he has been in that employment and those earnings are likely to represent his average weekly earnings from that employment his average weekly earnings must be estimated by reference to those earnings;
(b) in any other case, the authority must estimate the applicant’s average weekly earnings.

(3) Where the amount of an applicant’s earnings changes the authority must estimate his average weekly earnings by reference to his likely earnings from the employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period must not in any case exceed 52 weeks.
(4) For the purposes of this paragraph the applicant’s earnings are to be calculated in accordance with paragraphs 51 and 52 (earnings of employed earners: persons who are not pensioners).

48.0 Average weekly earnings of self-employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Where the income of an applicant who is not a pensioner or a lone parent with a child under 5 years of age consists of earnings from employment as a self-employed earner his average weekly earnings must be estimated by reference to his earnings from that employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately but the length of the period must not in any case exceed a year.

(2) For the purposes of this paragraph the applicant’s earnings must be calculated in accordance with paragraphs 53, 61 and 62 (earnings, and net profit, of self-employed earners).

(3) In the case that earnings calculated from self-employment are less than the national minimum wage level, the level of earnings used to calculate support shall be a notional earnings figure calculated by multiplying the number of hours worked per week by the national minimum hourly wage (the minimum income floor).

49.0 Average weekly income other than earnings: persons who are not pensioners or lone parents with a child under 5 years of age

(1) The income of an applicant who is not a pensioner which does not consist of earnings must, except where sub-paragraph (2) applies, be estimated over such period as is appropriate in order that his average weekly income may be estimated accurately but the length of the period must not in any case exceed 52 weeks; and nothing in this paragraph authorises an authority to disregard any such income other than that specified in Schedule 8 (sums disregarded in the calculation of income other than earnings: persons who are not pensioners).

(2) The period over which any benefit under the benefit Acts is to be taken into account is to be the period in respect of which that benefit is payable.

(3) For the purposes of this paragraph income other than earnings is to be calculated in accordance with paragraph 54 (calculation of income other than earnings: persons who are not pensioners).

50.0 Calculation of weekly income of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) For the purposes of paragraphs 47 (average weekly earnings of employed earners), 49 (average weekly income other than earnings) and 59 (calculation of average weekly income from tax credits), where the period in respect of which a payment is made—
(a) does not exceed a week, the weekly amount is to be the amount of that payment; 
(b) exceeds a week, the weekly amount is to be determined—
   (i) in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52; 
   (ii) in any other case, by dividing the amount of the payment by the number equal to the number of days in the period to which it relates and multiplying the product by 7.

(2) For the purposes of paragraph 48 (average weekly earnings of self-employed earners) the weekly amount of earnings of an applicant is to be determined by dividing his earnings
over the assessment period by the number equal to the number of days in that period and multiplying the product by 7.

51.0 Earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as an employed earner of a person who is not a pensioner or a lone parent with a child under 5 years of age, means any remuneration or profit derived from that employment and includes:
(a) any bonus or commission;
(b) any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;
(c) any payment in lieu of notice or any lump sum payment intended as compensation for the loss of employment but only in so far as it represents loss of income;
(d) any holiday pay except any payable more than 4 weeks after termination or interruption of the employment;
(e) any payment by way of a retainer;
(f) any payment made by the applicant's employer in respect of expenses not wholly, exclusively and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant's employer in respect of—
(i) travelling expenses incurred by the applicant between his home and place of employment;
(ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant's absence from home;
(g) any award of compensation made under section 112(4) or 117(3)(a) of the Employment Rights Act 1996 (remedies and compensation for unfair dismissal);
(h) any payment or remuneration made under section 28, 34, 64, 68 or 70 of the Employment Rights Act 1996 (right to guarantee payments, remuneration on suspension on medical or maternity grounds, complaints to employment tribunals);
(i) any such sum as is referred to in section 112 of the SSCBA (certain sums to be earnings for social security purposes);
(j) any statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, or a corresponding payment under any enactment having effect in Northern Ireland;
(k) any remuneration paid by or on behalf of an employer to the applicant who for the time being is on maternity leave, paternity leave or adoption leave or is absent from work because he is ill;
(l) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person's earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001.

(2) Earnings does not include—
(a) subject to sub-paragraph (3), any payment in kind;
(b) any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment;
(c) any occupational pension;
(d) any payment in respect of expenses arising out of the applicant's participation in a service user group.

(3) Sub-paragraph (2)(a) does not apply in respect of any non-cash voucher referred to in sub-paragraph (1)(l).

52.0 Calculation of net earnings of employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) For the purposes of paragraph 47 (average weekly earnings of employed earners: persons
who are not pensioners or lone parents with a child under 5 years of age), the earnings of an applicant who is not a pensioner or a lone parent with a child under 5 years of age derived or likely to be derived from employment as an employed earner to be taken into account must, subject to sub-paragraph (2), be his net earnings.

(2) There is to be disregarded from an applicant’s net earnings, any sum, where applicable, specified in paragraphs 1 to 16 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners or lone parents with a child under 5 years of age).

(3) For the purposes of sub-paragraph (1) net earnings must, except where sub-paragraph (6) applies, be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less—

(a) any amount deducted from those earnings by way of—

(i) income tax;

(ii) primary Class 1 contributions under the SSCBA;

(b) one-half of any sum paid by the applicant by way of a contribution towards an occupational pension scheme;

(c) one-half of the amount calculated in accordance with sub-paragraph (5) in respect of any qualifying contribution payable by the applicant; and

(d) where those earnings include a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, any amount deducted from those earnings by way of any contributions which are payable under any enactment having effect in Northern Ireland and which correspond to primary Class 1 contributions under the SSCBA.

(4) In this paragraph “qualifying contribution” means any sum which is payable periodically as a contribution towards a personal pension scheme.

(5) The amount in respect of any qualifying contribution is to be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying contribution is to be determined—

(a) where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365 or 366 in a leap year;

(b) in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.

(6) Where the earnings of an applicant are estimated under paragraph 47(2)(b) (average weekly earnings of employed earners: classes D to E), his net earnings is to be calculated by taking into account those earnings over the assessment period, less:

(a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 of the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances but, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal relief deductible under this sub-paragraph is to be calculated on a pro rata basis;

(b) an amount equivalent to the amount of the primary Class 1 contributions that would be payable by him under the SSCBA in respect of those earnings if such contributions were payable; and

(c) one-half of any sum which would be payable by the applicant by way of a contribution towards an occupational or personal pension scheme, if the earnings so estimated were actual earnings.
53.0 Earnings of self-employed earners: persons who are not pensioners or lone parents with a child under 5 years of age

(1) Subject to sub-paragraph (2), “earnings”, in the case of employment as a self-employed earner of a person who is not a pensioner or a lone parent with a child under 5 years of age, means the gross income of the employment.

(2) “Earnings” does not include any payment to which paragraph 31 or 32 of Schedule 8 refers (payments in respect of a person accommodated with the applicant under arrangements made by a local authority or voluntary organisation and payments made to the applicant by a health authority, local authority or voluntary organisation in respect of persons temporarily in the applicant’s care) nor does it include any sports award.

(3) This paragraph applies to:
   (a) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark; or
   (b) any payment in respect of any—
      (i) book registered under the Public Lending Right Scheme 1982; or
      (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982,
      where the applicant is the first owner of the copyright, design, patent or trade mark, or an original contributor to the book or work concerned.

(4) Where the applicant’s earnings consist of any items to which sub-paragraph (3) applies, those earnings must be taken into account over a period equal to such number of weeks as is equal to the number obtained (and any fraction is to be treated as a corresponding fraction of a week) by dividing the earnings by:
   (a) the amount of support under this scheme to which the applicant would have been entitled had the payment not been made, plus
   (b) an amount equal to the total of the sums which would fall to be disregarded from the payment under Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners or lone parents with a child under 5 years of age) as appropriate in the applicant’s case.

54.0 Calculation of income other than earnings: persons who are not pensioners

(1) For the purposes of paragraph 49 (average weekly income other than earnings: persons who are not pensioners), the income of an applicant who is not a pensioner which does not consist of earnings to be taken into account must, subject to sub-paragraphs (2) to (8), be his gross income and any capital treated as income under paragraph 55 (capital treated as income: persons who are not pensioners).

(2) There is to be disregarded from the calculation of an applicant’s gross income under sub-paragraph (1), any sum, where applicable, specified in Schedule 8.

(3) Where the payment of any benefit under the benefit Acts is subject to any deduction by way of recovery the amount to be taken into account under sub-paragraph (1) must be the gross amount payable.

(4) Where the applicant or, where he is a member of a couple, his partner is receiving a contributory employment and support allowance and that benefit has been reduced under regulation 63 of the Employment and Support Allowance Regulations 2008, the amount of that benefit to be taken into account is the amount as if it had not been reduced.

(5) Where an award of any working tax credit or child tax credit under the Tax Credits Act...
2002 is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account under sub-paragraph (1) is to be the amount of working tax credit or child tax credit awarded less the amount of that deduction.

(6) Sub-paragraphs (7) and (8) apply where—
(a) a relevant payment has been made to a person in an academic year; and
(b) that person abandons, or is dismissed from, his course of study before the payment to him of the final instalment of the relevant payment.

(7) Where a relevant payment is made quarterly, the amount of a relevant payment to be taken into account for the assessment period for the purposes of sub-paragraph (1) in respect of a person to whom sub-paragraph (7) applies, is to be calculated by applying the formula—

\[
\frac{A - (B \times C)}{D}
\]

Where
(a) \(A\) = the total amount of the relevant payment which that person would have received had he remained a student until the last day of the academic term in which he abandoned, or was dismissed from, his course, less any deduction under paragraph 81(5) (costs of travel, books and equipment);
(b) \(B\) = the number of support weeks from the support week immediately following that which includes the first day of that academic year to the support week which includes the day on which the person abandoned, or was dismissed from, his course;
(c) \(C\) = the weekly amount of the relevant payment, before the application of the £10 disregard, which would have been taken into account as income under paragraph 81(2) (treatment of student loans) had the person not abandoned or been dismissed from, his course and, in the case of a person who was not entitled to support under this scheme immediately before he abandoned or was dismissed from his course, had that person, at that time, been entitled to housing benefit;
(d) \(D\) = the number of support weeks in the assessment period.

(8) Where a relevant payment is made by two or more instalments in a quarter, the amount of a relevant payment to be taken into account for the assessment period for the purposes of sub-paragraph (1) in respect of a person to whom sub-paragraph (7) applies, is to be calculated by applying the formula in sub-paragraph (8) but as if—

\[
A = \text{the total amount of relevant payments which that person received, or would have received, from the first day of the academic year to the day the person abandoned the course, or was dismissed from it, less any deduction under paragraph 81(5).}
\]

(9) In this paragraph—
"academic year" and “student loan” have the same meanings as in Part 11 (students);
“assessment period” means
(a) in a case where a relevant payment is made quarterly, the period beginning with the support week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the support week which includes the last day of the last quarter for which an instalment of the relevant payment was payable to that person;
(b) in a case where the relevant payment is made by two or more instalments in a quarter, the period beginning with the support week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the support week which includes—
(i) the day immediately before the day on which the next instalment of the relevant payment would have been due had the payments continued; or
(ii) the last day of the last quarter for which an instalment of the relevant payment was payable to that person,
whichever of those dates is earlier;
“quarter” in relation to an assessment period means a period in that year beginning
on—(c) 1st January and ending on 31st March;
(d) 1st April and ending on 30th June;
(e) 1st July and ending on 31st August; or
(f) 1st September and ending on 31st December;
“relevant payment” means either a student loan or an amount intended for the
maintenance of dependants referred to in paragraph 76(7) or both.

(10) For the avoidance of doubt there must be included as income to be taken into account
under sub-paragraph (1)—
(a) any payment to which paragraph 41(2) or 51(2) (payments not earnings) applies; or
(b) in the case of an applicant who is receiving support under section 95 or 98 of the
Immigration and Asylum Act 1999 including support provided by virtue of
regulations made under Schedule 9 to that Act, the amount of such support
provided in respect of essential living needs of the applicant and his dependants (if
any) as is specified in regulations made under paragraph 3 of Schedule 8 to the
Immigration and Asylum Act 1999.

55.0 Capital treated as income: persons who are not pensioners

(1) Any capital payable by instalments which are outstanding at the date on which the
application is made or treated as made, or, at the date of any subsequent revision or
supersession, must, if the aggregate of the instalments outstanding and the amount of
the applicant's capital otherwise calculated in accordance with Chapter 7 of this Part
exceeds £16,000, be treated as income.

(2) Any payment received under an annuity is to be treated as income.

(3) Any earnings to the extent that they are not a payment of income is to be treated as
income.

(4) Any Career Development Loan paid pursuant to section 2 of the Employment and Training
Act 1973 is to be treated as income.

(5) Where an agreement or court order provides that payments must be made to the
applicant in consequence of any personal injury to the applicant and that such payments
are to be made, wholly or partly, by way of periodic payments, any such periodic
payments received by the applicant (but not a payment which is treated as capital by
virtue of this Part), is to be treated as income.

56.0 Notional income: persons who are not pensioners

(1) An applicant who is not a pensioner is to be treated as possessing income of which he has
deprieved himself for the purpose of securing entitlement to support under a council tax
support scheme or increasing the amount of the support.

(2) Except in the case of—
(a) a discretionary trust;
(b) a trust derived from a payment made in consequence of a personal injury;
(c) a personal pension scheme, occupational pension scheme or a payment made by
the Board of the Pension Protection Fund where the applicant has not attained the
qualifying age for state pension credit;
(d) any sum to which paragraph 50(2)(a) of Schedule 10 (capital disregards: persons
who are not pensioners) applies which is administered in the way referred to in
paragraph 50(1)(a);
(e) any sum to which paragraph 51(a) of Schedule 10 refers;
(f) rehabilitation allowance made under section 2 of the Employment and Training Act 1973;

(g) child tax credit;

(h) working tax credit, or

(i) any sum to which sub-paragraph (11) applies,

any income which would become available to the applicant upon application being made, but which has not been acquired by him, is to be treated as possessed by the applicant but only from the date on which it could be expected to be acquired were an application made.

(3) Any payment of income, other than a payment of income specified in sub-paragraph (4), made—

(a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) must, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;

(b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) must, where it is not a payment referred to in paragraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;

(c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) must be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

(4) Sub-paragraph (3) does not apply in respect of a payment of income made—

(a) under or by the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006);

(b) pursuant to section 19(1)(a) of the Coal Industry Act 1994 (concessionary coal);

(c) pursuant to section 2 of the Employment and Training Act 1973 in respect of a person’s participation—

(i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker’s Allowance Regulations 1996;

(ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;

(iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;

(iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations; or

(v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;

(d) in respect of a person’s participation in the Work for Your Benefit Pilot Scheme;

(e) in respect of a person’s participation in the Mandatory Work Activity Scheme;

(f) in respect of an applicant’s participation in the Employment, Skills and Enterprise Scheme;

(g) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—

(i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that
person’s estate under section 41 of the Solicitors (Scotland) Act 1980;
(ii) the payment is made to the trustee in bankruptcy or any other person acting
on behalf of the creditors; and
(iii) the person referred to in sub-paragraph (i) and any member of his family does
not possess, or is not treated as possessing, any other income apart from that
payment.

(5) Where an applicant is in receipt of any benefit under the benefit Acts and the rate of that
benefit is altered with effect from a date on or after 1st April in any year but not more
than 14 days thereafter, the authority must treat the applicant as possessing such benefit
at the altered rate from either 1st April or the first Monday in April in that year, whichever
date the authority selects, to the date on which the altered rate is to take effect.

(6) Subject to sub-paragraph (7), where—
(a) an applicant performs a service for another person; and
(b) that person makes no payment of earnings or pays less than that paid for a
comparable employment in the area,
the authority must treat the applicant as possessing such earnings (if any) as is
reasonable for that employment unless the applicant satisfies the authority that the
means of that person are insufficient for him to pay or to pay more for the service.

(7) Sub-paragraph (6) does not apply—
(a) to an applicant who is engaged by a charitable or voluntary organisation or who is a
volunteer if the authority is satisfied in any of those cases that it is reasonable for
him to provide those services free of charge; or
(b) in a case where the service is performed in connection with—
(i) the applicant’s participation in an employment or training programme in
accordance with regulation 19(1)(q) of the Jobseeker’s Allowance Regulations
1996, other than where the service is performed in connection with the
applicant’s participation in the Intense Activity Period specified in regulation
75(1)(a)(iv) of those Regulations; or
(ii) the applicant’s or the applicant’s partner’s participation in an employment or
training programme as defined in regulation 19(3) of those Regulations for which
a training allowance is not payable or, where such an allowance is payable, it is
payable for the sole purpose of reimbursement of travelling or meal expenses to
the person participating in that programme; or
(c) to an applicant who is participating in a work placement approved by the Secretary
of State (or a person providing services to the Secretary of State) before the
placement starts.

(8) In sub-paragraph (7)(c) “work placement” means practical work experience which is not
undertaken in expectation of payment.

(9) Where an applicant is treated as possessing any income under any of sub-paragraphs (1)
to (8), the foregoing provisions of this Part apply for the purposes of calculating the
amount of that income as if a payment had actually been made and as if it were actual
income which he does possess.

(10) Where an applicant is treated as possessing any earnings under sub-paragraph (6) the
foregoing provisions of this Part apply for the purposes of calculating the amount of those
earnings as if a payment had actually been made and as if they were actual earnings
which he does possess except that paragraph 42(2) or 52(3) (calculation of net earnings of
employed earners: pensioners and persons who are not pensioners, respectively) do not
apply and his net earnings are to be calculated by taking into account those earnings
which he is treated as possessing, less—
(a) an amount in respect of income tax equivalent to an amount calculated by applying
to those earnings the basic rate of tax applicable to the assessment period less only
the personal relief to which the applicant is entitled under sections 35 to 37 of the
Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances;
but, if the assessment period is less than a year, the earnings to which the basic rate
of tax is to be applied and the amount of the personal relief deductible under this
sub-paragraph is to be calculated on a pro rata basis;
(b) an amount equivalent to the amount of the primary Class 1 contributions that
would be payable by him under the SSCBA in respect of those earnings if such
contributions were payable; and
(c) one-half of any sum payable by the applicant by way of a contribution towards an
occupational or personal pension scheme.

(11) Sub-paragraphs (1), (2), (3) and (6) do not apply in respect of any amount of income
other than earnings, or earnings of an employed earner, arising out of the applicant’s
participation in a service user group.

CHAPTER 6 Income: further provisions applying to all applicants

57.0 Calculation of income on a weekly basis

(1) Subject to paragraph 60 (disregard of changes in tax, etc.), the income of an applicant is to
be calculated on a weekly basis—
(a) by estimating the amount which is likely to be his average weekly income in
accordance with this Part;
(b) by adding to that amount the weekly income calculated—
(i) if the applicant is a pensioner, under paragraph 71 (tariff income: pensioners);
(ii) if the applicant (including lone parents with a child under 5 years of age) is a
person who is not a pensioner, under paragraph 72 (tariff income: persons
who are not pensioners); and
(c) deducting from the sum of paragraphs (a) and (b) any relevant child care charges to
which paragraph 58 (treatment of child care charges) applies from any earnings
which form part of the average weekly income or, in a case where the conditions in
sub-paragraph (2) are met, from those earnings plus whichever credit specified in
paragraph (b) of that sub-paragraph is appropriate, up to a maximum deduction in
respect of the applicant’s family of whichever of the sums specified in sub-
paragraph (3) applies in his case.

(2) The conditions of this paragraph are that—
(a) the applicant’s earnings which form part of his average weekly income are less than
the lower of either his relevant child care charges or whichever of the deductions
specified in sub-paragraph (3) otherwise applies in his case; and
(b) that applicant or, if he is a member of a couple either the applicant or his partner, is
in receipt of either working tax credit or child tax credit.

(3) The maximum deduction to which sub-paragraph (1)(c) above refers is to be—
(a) where the applicant’s family includes only one child in respect of whom relevant
child care charges are paid, £175.00 per week;
(b) where the applicant’s family includes more than one child in respect of whom
relevant child care charges are paid, £300 per week.

58.0 Treatment of child care charges

(1) This paragraph applies where an applicant (within the meaning in this paragraph) is
incurring relevant child care charges and—
(a) is a lone parent and is engaged in remunerative work;
(b) is a member of a couple both of whom are engaged in remunerative work; or
(c) is a member of a couple where one member is engaged in remunerative work and the other—
   (i) is incapacitated;
   (ii) is an in-patient in hospital; or
   (iii) is in prison (whether serving a custodial sentence or remanded in custody awaiting trial or sentence).

(2) For the purposes of sub-paragraph (1) and subject to sub-paragraph (4), a person to whom sub-paragraph (3) applies must be treated as engaged in remunerative work for a period not exceeding 28 weeks during which he—
   (a) is paid statutory sick pay;
   (b) is paid short-term incapacity benefit at the lower rate under sections 30A to 30E of the SSCBA;
   (c) is paid an employment and support allowance;
   (d) is paid income support on the grounds of incapacity for work under regulation 42A of, and paragraph 7 or 14 of Schedule 1B to, the Income Support (General) Regulations 1987; or
   (e) is credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations 1975.

(3) This sub-paragraph applies to a person who was engaged in remunerative work immediately before—
   (a) the first day of the period in respect of which he was first paid statutory sick pay, short-term incapacity benefit, an employment and support allowance or income support on the grounds of incapacity for work; or
   (b) the first day of the period in respect of which earnings are credited, as the case may be.

(4) In a case to which sub-paragraph (2)(d) or (e) applies, the period of 28 weeks begins on the day on which the person is first paid income support or on the first day of the period in respect of which earnings are credited, as the case may be.

(5) Relevant child care charges are those charges for care to which sub-paragraphs (6) and (7) apply, and are to be calculated on a weekly basis in accordance with sub-paragraph (10).

(6) The charges are paid by the applicant for care which is provided—
   (a) in the case of any child of the applicant’s family who is not disabled, in respect of the period beginning on that child’s date of birth and ending on the day preceding the first Monday in September following that child’s fifteenth birthday; or
   (b) in the case of any child of the applicant’s family who is disabled, in respect of the period beginning on that person’s date of birth and ending on the day preceding the first Monday in September following that person’s sixteenth birthday.

(7) The charges are paid for care which is provided by one or more of the care providers listed in sub-paragraph (8) and are not paid—
   (a) in respect of the child’s compulsory education;
   (b) by an applicant to a partner or by a partner to an applicant in respect of any child for whom either or any of them is responsible in accordance with paragraph 7 (circumstances in which a person is treated as responsible or not responsible for another); or
   (c) in respect of care provided by a relative of the child wholly or mainly in the child’s home.

(8) The care to which sub-paragraph (7) refers may be provided—
   (a) out of school hours, by a school on school premises or by a local authority—
      (i) for children who are not disabled in respect of the period beginning on their eighth birthday and ending on the day preceding the first Monday in
September following their fifteenth birthday; or
(ii) for children who are disabled in respect of the period beginning on their
eighth birthday and ending on the day preceding the first Monday in
September following their sixteenth birthday; or
(b) by a child care provider approved in accordance with the Tax Credit (New Category
of Child Care Provider) Regulations 1999; or
(c) by persons registered under Part 2 of the Children and Families (Wales) Measure
2010; or
(d) by a person who is excepted from registration under Part 2 of the Children and
Families (Wales) Measure 2010 because the child care that person provides is in a
school or establishment referred to in article 11, 12 or 14 of the Child Minding and
Day Care Exceptions (Wales) Order 2010; or
(e) by—
   (i) persons registered under section 59(1) of the Public Services Reform (Scotland)
       Act 2010; or
   (ii) local authorities registered under section 83(1) of that Act,
where the care provided is child minding or day care of children within the meaning of
that Act; or
(f) by a person prescribed in regulations made pursuant to section 12(4) of the Tax
Credits Act 2002; or
(g) by a person who is registered under Chapter 2 or 3 of Part 3 of the Childcare Act
2006; or
(h) by any of the schools mentioned in section 34(2) of the Childcare Act 2006 in
circumstances where the requirement to register under Chapter 2 of Part 3 of that
Act does not apply by virtue of section 34(2) of that Act; or
(i) by any of the schools mentioned in section 53(2) of the Childcare Act 2006 in
circumstances where the requirement to register under Chapter 3 of Part 3 of that
Act does not apply by virtue of section 53(2) of that Act; or
(j) by any of the establishments mentioned in section 18(5) of the Childcare Act 2006 in
circumstances where the care is not included in the meaning of “childcare” for the
purposes of Part 1 and Part 3 of that Act by virtue of that subsection; or
(k) by a foster parent or kinship carer under the Fostering Services Regulations 2011,
the Fostering Services (Wales) Regulations 2003 or the Looked After Children
(Scotland) Regulations 2009 in relation to a child other than one whom the foster
parent is fostering or kinship carer is looking after; or
(l) by a provider of personal care within the meaning of paragraph 1 of Schedule 1 to
the Health and Social Care Act 2008 (Regulated Activities) Regulations 2010 103 and
being a regulated activity prescribed by those Regulations; or
(m) by a person who is not a relative of the child wholly or mainly in the child's home.

(9) In sub-paragraphs (6) and (8)(a), “the first Monday in September” means the Monday
which first occurs in the month of September in any year.

(10) Relevant child care charges must be estimated over such period, not exceeding a year, as
is appropriate in order that the average weekly charge may be estimated accurately
having regard to information as to the amount of that charge provided by the child
minder or person providing the care.

(11) For the purposes of sub-paragraph (1)(c) the other member of a couple is incapacitated
where—
   (a) the applicant is a pensioner and the other member of the couple is aged not less
   than 80;
   (b) the applicant is a pensioner and the other member of the couple is aged less than
   80, and—
   (i) the additional condition specified in paragraph 10 of Schedule 3 (additional
   condition for the disability premium) to this scheme is treated as applying in
   his case; and

57
(ii) he satisfies that conditions or would satisfy it but for his being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;

(c) the applicant is not a pensioner, the applicant's applicable amount includes a disability premium on account of the other member's incapacity or the support component or the work-related activity component on account of his having limited capability for work;

(d) the applicant is not a pensioner, the applicant's applicable amount would include a disability premium on account of the other member's incapacity but for that other member being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;

(e) the applicant's applicable amount would include the support component or the work-related activity component on account of the other member having limited capability for work but for that other member being treated as not having limited capability for work by virtue of a determination made in accordance with the Employment and Support Allowance Regulations 2008;

(f) he is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work) for a continuous period of not less than 196 days; and for this purpose any two or more separate periods separated by a break of not more than 56 days must be treated as one continuous period;

(g) he is, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations 2008 for a continuous period of not less than 196 days and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period;

(h) there is payable in respect of him one or more of the following pensions or allowances—

(i) long-term incapacity benefit or short-term incapacity benefit at the higher rate under Schedule 4 to the SSCBA;

(ii) attendance allowance under section 64 of the SSCBA;

(iii) severe disablement allowance under section 68 of the SSCBA;

(iv) disability living allowance under section 71 of the SSCBA;

(v) personal independence payment;

(vi) an AFIP;

(vii) increase of disablement pension under section 104 of the SSCBA;

(viii) a pension increase paid as part of a war disablement pension or under an industrial injuries scheme which is analogous to an allowance or increase of disablement pension under sub-paragraph (ii), (iv), (v) or (vii) above;

(ix) main phase employment and support allowance;

(i) a pension or allowance to which sub-paragraph (vii) or (viii) of paragraph (h) above refers was payable on account of his incapacity but has ceased to be payable in consequence of his becoming a patient, which in this paragraph means a person (other than a person who is serving a sentence of imprisonment or detention in a youth custody institution) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005;

(j) an attendance allowance under section 64 of the SSCBA or disability living allowance would be payable to that person but for—

(i) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or

(ii) an abatement as a consequence of hospitalisation;

(k) the daily living component of personal independence payment would be payable to that person but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients);

(l) an AFIP would be payable to that person but for any suspension of payment in
accordance with any terms of the armed and reserve forces compensation scheme which allow for a suspension because a person is undergoing medical treatment in a hospital or similar institution;

(m) paragraph (h), (i), (j) or (k) would apply to him if the legislative provisions referred to in those paragraphs were provisions under any corresponding enactment having effect in Northern Ireland; or

(n) he has an invalid carriage or other vehicle provided to him by the Secretary of State or a clinical commissioning group under paragraph 9 of Schedule 1 to the National Health Service Act 2006 or under section 46 of the National Health Service (Scotland) Act 1978 or provided by the Department of Health, Social Services and Public Safety in Northern Ireland under Article 30(1) of the Health and Personal Social Services (Northern Ireland) Order 1972.

(12) For the purposes of sub-paragraph (11), once sub-paragraph (11)(f) applies to the person, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated as incapable, of work, that sub-paragraph is, on his again becoming so incapable, or so treated as incapable, of work at the end of that period, immediately thereafter to apply to him for so long as he remains incapable, or is treated as remaining incapable, of work.

(13) For the purposes of sub-paragraph (11), once sub-paragraph (11)(g) applies to the person, if he then ceases, for a period of 84 days or less, to have, or to be treated as having, limited capability for work, that paragraph is, on his again having, or being treated as having, limited capability for work at the end of that period, immediately thereafter to apply to him for so long as he has, or is treated as having, limited capability for work.

(14) For the purposes of sub-paragraphs (6) and (8)(a), a person is disabled if he is a person—

(a) to whom an attendance allowance or the care component of disability allowance is payable or would be payable but for—

(i) a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA; or

(ii) an abatement as a consequence of hospitalisation;

(b) to whom the daily living component of personal independence payment is payable or would be payable but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012 (hospital in-patients);

(c) who is registered as blind in a register compiled under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence he is registered as blind in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

(d) who ceased to be registered as blind in such a register within the period beginning 28 weeks before the first Monday in September following that person's fifteenth birthday and ending on the day preceding that person's sixteenth birthday.

(15) For the purposes of sub-paragraph (1) a person on maternity leave, paternity leave or adoption leave is to be treated as if he is engaged in remunerative work for the period specified in sub-paragraph (16) ("the relevant period") provided that—

(a) in the week before the period of maternity leave, paternity leave or adoption leave began he was in remunerative work;

(b) the applicant is incurring relevant child care charges within the meaning of sub-paragraph (5); and

(c) he is entitled to either statutory maternity pay under section 164 of the SSCBA, ordinary statutory paternity pay by virtue of section 171ZA or 171ZB of that Act, additional statutory paternity pay by virtue of section 171ZEA or 171ZEB of that Act, statutory adoption pay by of section 171ZL of that Act, maternity allowance under section 35 of that Act or qualifying support.

(16) For the purposes of sub-paragraph (15) the relevant period begins on the day on which
the person’s maternity, paternity leave or adoption leave commences and ends on—
(a) the date that leave ends;
(b) if no child care element of working tax credit is in payment on the date that
entitlement to maternity allowance, qualifying support, statutory maternity pay,
ordinary or additional statutory paternity pay or statutory adoption pay ends, the
date that entitlement ends; or
(c) if a child care element of working tax credit is in payment on the date that
entitlement to maternity allowance or qualifying support, statutory maternity pay,
ordinary or additional statutory paternity pay or statutory adoption pay ends, the
date that entitlement to that award of the child care element of the working tax
credit ends,
whichever occurs first.

(17) In sub-paragraphs (15) and (16)—
(a) “qualifying support” means income support to which that person is entitled by
virtue of paragraph 14B of Schedule 1B to the Income Support (General)
Regulations 1987; and
(b) “child care element” of working tax credit means the element of working tax credit
prescribed under section 12 of the Tax Credits Act 2002 (child care element).

(18) In this paragraph “applicant” does not include an applicant
(a) who has, or
(b) who (jointly with his partner) has,
an award of universal credit.

59.0 Calculation of weekly income from tax credits
(1) This paragraph applies where an applicant receives a tax credit.

(2) Where this paragraph applies, the period over which a tax credit is to be taken into
account is the period set out in sub-paragraph (3).

(3) Where the instalment in respect of which payment of a tax credit is made is—
(a) a daily instalment, the period is 1 day, being the day in respect of which the
instalment is paid;
(b) a weekly instalment, the period is 7 days, ending on the day on which the
instalment is due to be paid;
(c) a two weekly instalment, the period is 14 days, commencing 6 days before the day
on which the instalment is due to be paid;
(d) a four weekly instalment, the period is 28 days, ending on the day on which the
instalment is due to be paid.

(4) For the purposes of this paragraph “tax credit” means child tax credit or working tax
credit.

60.0 Disregard of changes in tax, contributions etc.

In calculating the applicant’s income the authority may disregard any legislative change—
(a) in the basic or other rates of income tax;
(b) in the amount of any personal tax relief;
(c) in the rates of social security contributions payable under the SSCBA or in the lower
earnings limit or upper earnings limit for Class 1 contributions under that Act, the
lower or upper limits applicable to Class 4 contributions under that Act or the
amount specified in section 11(4) of that Act (small earnings exception in relation to
Class 2 contributions);
(d) in the amount of tax payable as a result of an increase in the weekly rate of
61.0 Calculation of net profit of self-employed earners

(1) For the purposes of paragraphs 48 (average weekly earnings of self-employed earners: persons who are not pensioners and lone parents with a child under 5 years of age) and 57 (calculation of income on a weekly basis) the earnings of an applicant to be taken into account must be—
(a) in the case of a self-employed earner who is engaged in employment on his own account, the net profit derived from that employment;
(b) in the case of a self-employed earner who is a pensioner whose employment is carried on in partnership, his share of the net profit derived from that employment, less—
(i) an amount in respect of income tax and of social security contributions payable under the SSCBA calculated in accordance with paragraph 62 (deduction of tax and contributions of self-employed earners); and
(ii) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium;
(c) in the case of a self-employed earner who is not a pensioner whose employment is carried on in partnership or is that of a share fisherman within the meaning of the Social Security (Mariners’ Benefits) Regulations 1975, his share of the net profit derived from that employment, less—
(i) an amount in respect of income tax and of social security contributions payable under the SSCBA calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and
(ii) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.

(2) There must be disregarded from the net profit of an applicant who is not a pensioner, any sum, where applicable, specified in paragraphs 1 to 16 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners).

(3) For the purposes of sub-paragraph (1)(a) the net profit of the employment must, except where sub-paragraph (9) applies, be calculated by taking into account the earnings of the employment over the assessment period less—
(a) subject to sub-paragraphs (5) to (8), any expenses wholly and exclusively incurred in that period for the purposes of that employment;
(b) an amount in respect of—
(i) income tax; and
(ii) social security contributions payable under the SSCBA, calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and
(c) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.

(4) For the purposes of sub-paragraph (1)(b) the net profit of the employment is to be calculated by taking into account the earnings of the employment over the assessment period less, subject to sub-paragraphs (5) to (8), any expenses wholly and exclusively incurred in that period for the purposes of the employment.

(5) Subject to sub-paragraph (6), no deduction is to be made under sub-paragraph (3)(a) or (4), in respect of—
(a) any capital expenditure;
(b) the depreciation of any capital asset;
(c) any sum employed or intended to be employed in the setting up or expansion of the employment;
(d) any loss incurred before the beginning of the assessment period;
(e) the repayment of capital on any loan taken out for the purposes of the employment;
(f) any expenses incurred in providing business entertainment; and

(g) in the case of an applicant who is not a pensioner, any debts, except bad debts proved to be such, but this paragraph does not apply to any expenses incurred in the recovery of a debt.

(6) A deduction is to be made under sub-paragraph (3)(a) or (4) in respect of the repayment of capital on any loan used for—

(a) the replacement in the course of business of equipment or machinery; or
(b) the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair.

(7) The authority must refuse to make a deduction in respect of any expenses under sub-paragraph (3)(a) or (4) where it is not satisfied given the nature and the amount of the expense that it has been reasonably incurred.

(8) For the avoidance of doubt—

(a) a deduction must not be made under sub-paragraph (3)(a) or (4) in respect of any sum unless it has been expended for the purposes of the business;
(b) a deduction must be made thereunder in respect of—

(i) the excess of any value added tax paid over value added tax received in the assessment period;
(ii) any income expended in the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair;
(iii) any payment of interest on a loan taken out for the purposes of the employment.

(9) Where an applicant is engaged in employment as a child minder the net profit of the employment is to be one-third of the earnings of that employment, less—

(a) an amount in respect of—

(i) income tax; and
(ii) social security contributions payable under the SSCBA, calculated in accordance with paragraph 62 (deduction of tax and contributions for self-employed earners); and

(b) one-half of the amount calculated in accordance with sub-paragraph (11) in respect of any qualifying premium.

(10) For the avoidance of doubt where an applicant is engaged in employment as a self-employed earner and he is also engaged in one or more other employments as a self-employed or employed earner any loss incurred in any one of his employments must not be offset against his earnings in any other of his employments.

(11) The amount in respect of any qualifying premium is to be calculated by multiplying the daily amount of the qualifying premium by the number equal to the number of days in the assessment period; and for the purposes of this paragraph the daily amount of the qualifying premium must be determined—

(a) where the qualifying premium is payable monthly, by multiplying the amount of the qualifying premium by 12 and dividing the product by 355 or 366 in a leap year;
(b) in any other case, by dividing the amount of the qualifying premium by the number equal to the number of days in the period to which the qualifying premium relates.
(12) In this paragraph, “qualifying premium” means any premium which is payable periodically in respect of a personal pension scheme and is so payable on or after the date of application.

62.0 Calculation of deduction of tax and contributions of self-employed earners

(1) The amount to be deducted in respect of income tax under paragraph 61(1)(b)(i), (3)(b)(i) or (9)(a)(i) (calculation of net profit of self-employed earners) must be calculated—
(a) on the basis of the amount of chargeable income, and
(b) as if that income were assessable to income tax at the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 35 to 37 of the Income Tax Act 2007 (personal allowances) as is appropriate to his circumstances.

(2) But, if the assessment period is less than a year, the earnings to which the basic rate of tax is to be applied and the amount of the personal reliefs deductible under this paragraph must be calculated on a pro rata basis.

(3) The amount to be deducted in respect of social security contributions under paragraph 60(1)(b)(i), (3)(b)(ii) or (9)(a)(ii) is the total of—
(a) the amount of Class 2 contributions payable under section 11(1) or, as the case may be, 11(3) of the SSCBA at the rate applicable to the assessment period except where the applicant's chargeable income is less than the amount specified in section 11(4) of that Act (small earnings exception) for the tax year applicable to the assessment period; but if the assessment period is less than a year, the amount specified for that tax year must be reduced pro rata; and
(b) the amount of Class 4 contributions (if any) which would be payable under section 15 of the SSCBA (Class 4 contributions recoverable under the Income Tax Acts) at the percentage rate applicable to the assessment period on so much of the chargeable income as exceeds the lower limit but does not exceed the upper limit of profits and gains applicable for the tax year applicable to the assessment period; but if the assessment period is less than a year, those limits must be reduced pro rata.

(4) In this paragraph “chargeable income” means
(a) except where paragraph (b) applies, the earnings derived from the employment less any expenses deducted under sub-paragraph (3)(a) or, as the case may be, (5) of paragraph 61;
(b) in the case of employment as a child minder, one-third of the earnings of that employment.

CHAPTER 7 Capital

63.0 Calculation of capital

(1) The capital of an applicant to be taken into account must be, subject to sub-paragraph (2), the whole of his capital calculated in accordance with this Part and (in the case of persons who are not pensioners) any income treated as capital under paragraph 64 (income treated as capital: persons who are not pensioners).

(2) There must be disregarded from the calculation of an applicant’s capital under sub-paragraph (1), any capital, where applicable, specified in—
(a) Schedule 9, in relation to pensioners;
(b) Schedule 10, in relation to persons who are not pensioners, including lone parents with a child under 5 years of age.
(3) In the case of an applicant who is a pensioner, his capital is to be treated as including any payment made to him by way of arrears of—
(a) child tax credit;
(b) working tax credit;
(c) state pension credit,
if the payment was made in respect of a period for the whole or part of which support under this scheme was allowed before those arrears were paid.

(4) The capital of a child or young person who is a member of the family of an applicant who is not a pensioner must not be treated as capital of the applicant.

64.0 Income treated as capital: persons who are not pensioners

(1) This paragraph applies in relation to persons (including lone parents with a child under 5 years of age), who are not pensioners.

(2) Any bounty derived from employment to which paragraph 9 of Schedule 7 (sums disregarded in the calculation of earnings: persons who are not pensioners) applies and paid at intervals of at least one year is to be treated as capital.

(3) Any amount by way of a refund of income tax deducted from profits or emoluments chargeable to income tax under Schedule D or E is to be treated as capital.

(4) Any holiday pay which is not earnings under paragraph 41(1)(d) or 51(1)(d) (earnings of employed earners) is to be treated as capital.

(5) Except any income derived from capital disregarded under paragraphs 4, 5, 7, 11, 17, 30 to 33, 50 or 51 of Schedule 10 (capital disregards: persons who are not pensioners), any income derived from capital is to be treated as capital but only from the date it is normally due to be credited to the applicant’s account.

(6) In the case of employment as an employed earner, any advance of earnings or any loan made by the applicant’s employer is to be treated as capital.

(7) Any charitable or voluntary payment which is not made or due to be made at regular intervals, other than a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Independent Living Fund (2006) or the London Bombings Charitable Relief Fund, is to be treated as capital.

(8) There is to be treated as capital the gross receipts of any commercial activity carried on by a person in respect of which assistance is received under the self-employment route, but only in so far as those receipts were payable into a special account during the period in which that person was receiving such assistance.

(9) Any arrears of subsistence allowance which are paid to an applicant as a lump sum must be treated as capital.

(10) Any arrears of working tax credit or child tax credit must be treated as capital.

65.0 Calculation of capital in the United Kingdom

Capital which an applicant possesses in the United Kingdom is to be calculated at its current market or surrender value less—
(a) where there would be expenses attributable to the sale, 10 per cent; and
(b) the amount of any encumbrance secured on it.
66.0 Calculation of capital outside the United Kingdom

Capital which an applicant possesses in a country outside the United Kingdom must be calculated—
(a) in a case where there is no prohibition in that country against the transfer to the United Kingdom of an amount equal to its current market or surrender value in that country, at that value;
(b) in a case where there is such a prohibition, at the price which it would realise if sold in the United Kingdom to a willing buyer, less, where there would be expenses attributable to sale, 10 per cent and the amount of any encumbrances secured on it.

67.0 Notional capital

(1) An applicant is to be treated as possessing capital of which he has deprived himself for the purpose of securing entitlement to support or increasing the amount of that support except to the extent that that capital is reduced in accordance with paragraph 68 (diminishing notional capital rule).

(2) A person who is a pensioner who disposes of capital for the purpose of—
(a) reducing or paying a debt owed by the applicant; or
(b) purchasing goods or services if the expenditure was reasonable in the circumstances of the applicant's case,
is to be regarded as not depriving himself of it.

(3) Sub-paragraphs (4) to (6) apply in relation to applicants who are not pensioners.

(4) Except in the case of—
(a) a discretionary trust; or
(b) a trust derived from a payment made in consequence of a personal injury; or
(c) any loan which would be obtained only if secured against capital disregarded under Schedule 9; or
(d) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund; or
(e) any sum to which paragraph 50(2)(a) of Schedule 10 (capital disregards: persons who are not pensioners) applies which is administered in the way referred to in paragraph 50(1)(a); or
(f) any sum to which paragraph 51(a) of Schedule 10 refers; or
(g) child tax credit; or
(h) working tax credit,
any capital which would become available to the applicant upon application being made, but which has not been acquired by him, is to be treated as possessed by him but only from the date on which it could be expected to be acquired were an application made.

(5) Any payment of capital, other than a payment of capital specified in sub-paragraph (6), made—
(a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) must, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
(b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) must, where it is not a payment referred to in paragraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary
clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;

(c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of the family) must be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

(6) Sub-paragraph (5) does not apply in respect of a payment of capital made—
(a) under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation, or the London Bombings Relief Charitable Fund;
(b) pursuant to section 2 of the Employment and Training Act 1973 in respect of a person's participation
(i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker’s Allowance Regulations 1996;
(ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
(iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;
(iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations; or
(v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;
(c) in respect of a person's participation in the Work for Your Benefit Pilot Scheme;
(d) in respect of a person's participation in the Mandatory Work Activity Scheme;
(e) in respect of an applicant's participation in the Employment, Skills and Enterprise Scheme;

(f) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
(i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
(ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
(iii) the person referred to in sub-paragraph (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.

(7) Where an applicant stands in relation to a company in a position analogous to that of a sole owner or partner in the business of that company, he may be treated as if he were such sole owner or partner and in such a case—
(a) the value of his holding in that company must, notwithstanding paragraph 63 (calculation of capital) be disregarded; and
(b) he must, subject to sub-paragraph (8), be treated as possessing an amount of capital equal to the value or, as the case may be, his share of the value of the capital of that company and the foregoing provisions of this Chapter apply for the purposes of calculating that amount as if it were actual capital which he does possess.

(8) For so long as the applicant undertakes activities in the course of the business of the company, the amount which he is treated as possessing under sub-paragraph (7) is to be disregarded.

(9) Where an applicant is treated as possessing capital under any of sub-paragraphs (1), (4) or (5) the foregoing provisions of this Chapter apply for the purposes of calculating its
amount as if it were actual capital which he does possess.

68.0 Diminishing notional capital rule: pensioners

(1) Where an applicant who is a pensioner is treated as possessing capital under paragraph 67(1) (notional capital), the amount which he is treated as possessing—
(a) in the case of a week that is subsequent to—
   (i) the relevant week in respect of which the conditions set out in sub-paragraph (2) are satisfied; or
   (ii) a week which follows that relevant week and which satisfies those conditions, is to be reduced by an amount determined under sub-paragraph (3);
(b) in the case of a week in respect of which sub-paragraph (1)(a) does not apply but where—
   (i) that week is a week subsequent to the relevant week; and
   (ii) that relevant week is a week in which the condition in sub-paragraph (4) is satisfied, is to be reduced by the amount determined under sub-paragraph (5).

(2) This sub-paragraph applies to a support week where the applicant satisfies the conditions that—
(a) he is in receipt of support under this scheme; and
(b) but for paragraph 67(1), he would have received greater support in council tax under this scheme in that week.

(3) In a case to which sub-paragraph (2) applies, the amount of the reduction in the amount of capital he is treated as possessing for the purposes of sub-paragraph (1)(a) must be equal to the aggregate of—
(a) an amount equal to the additional amount of the reduction in council tax to which sub-paragraph (2)(b) refers;
(b) where the applicant has also claimed state pension credit, the amount of any state pension credit or any additional amount of state pension credit to which he would have been entitled in respect of the support week to which sub-paragraph (2) refers but for the application of regulation 21(1) of the State Pension Credit Regulations 2002 (notional capital);
(c) where the applicant has also claimed housing benefit, the amount of any housing benefit or any additional amount of housing benefit to which he would have been entitled in respect of the whole or part of the support week to which sub-paragraph (2) refers but for the application of regulation 47(1) of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 (notional capital);
(d) where the applicant has also claimed a jobseeker’s allowance, the amount of an income-based jobseeker’s allowance to which he would have been entitled in respect of the support week to which sub-paragraph (2) refers but for the application of regulation 113 of the Jobseeker’s Allowance Regulations 1996 (notional capital); and
(e) where the applicant has also claimed an employment and support allowance, the amount of an income-related employment and support allowance to which he would have been entitled in respect of the support week to which sub-paragraph (2) refers but for the application of regulation 115 of the Employment and Support Allowance Regulations 2008 (notional capital).

(4) Subject to sub-paragraph (7), for the purposes of sub-paragraph (1)(b) the condition is that the applicant is a pensioner and would have been entitled to a reduction in council tax under this scheme in the relevant week but for paragraph 67(1).

(5) In such a case the amount of the reduction in the amount of capital he is treated as
possessing for the purposes of sub-paragraph (1)(b) is equal to the aggregate of—
(a) the amount of the reduction in council tax to which the applicant would have been entitled in the relevant week but for paragraph 67(1);
(b) if the applicant would, but for regulation 21 of the State Pension Credit Regulations 2002, have been entitled to state pension credit in respect of the benefit week, within the meaning of regulation 1(2) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled;
(c) if the applicant would, but for regulation 47(1) of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006, have been entitled to housing benefit or to an additional amount of housing benefit in respect of the benefit week which includes the last day of the relevant week, the amount which is equal to—
(i) in a case where no housing benefit is payable, the amount to which he would have been entitled; or
(ii) in any other case, the amount equal to the additional amount of housing benefit to which he would have been entitled;
(d) if the applicant would, but for regulation 113 of the Jobseeker's Allowance Regulations 1996, have been entitled to an income-based jobseeker's allowance in respect of the benefit week, within the meaning of regulation 1(3) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled; and
(e) if the applicant would, but for regulation 115 of the Employment and Support Allowance Regulations 2008, have been entitled to an income-related employment and support allowance in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled.

(6) But if the amount mentioned in paragraph (a), (b), (c), (d) or (e) of sub-paragraph (5) (“the relevant amount”) is in respect of a part-week, the amount that is to be taken into account under that paragraph is to be determined by—
(a) dividing the relevant amount by the number equal to the number of days in that part-week, and
(b) multiplying the result of that calculation by 7.

(7) The amount determined under sub-paragraph (5) is to be re-determined under that sub-paragraph if the applicant makes a further application and the conditions in sub-paragraph (8) are satisfied, and in such a case—
(a) paragraphs (a) to (e) of sub-paragraph (5) apply as if for the words “‘relevant week’” there were substituted the words “‘relevant subsequent week’”; and
(b) subject to sub-paragraph (9), the amount as re-determined has effect from the first week following the relevant subsequent week in question.

(8) The conditions are that—
(a) a further application is made 26 or more weeks after—
(i) the date on which the applicant made an application in respect of which he was first treated as possessing the capital in question under paragraph 67(1);
(ii) in a case where there has been at least one re-determination in accordance with sub-paragraph (11), the date on which he last made an application which resulted in the weekly amount being re-determined, or
(iii) the date on which he last ceased to be entitled to support under this scheme, whichever last occurred; and
(b) the applicant would have been entitled to support under this scheme but for paragraph 67(1).

(9) The amount as re-determined pursuant to sub-paragraph (7) must not have effect if it is less than the amount which applied in that case immediately before the re-determination
and in such a case the higher amount must continue to have effect.

(10) For the purposes of this paragraph—
“part-week”—
(a) in relation to an amount mentioned in sub-paragraph (5)(a), means a period of less than a week for which a reduction in council tax under this scheme is allowed;
(b) in relation to an amount mentioned in sub-paragraph (5)(b), means a period of less than a week for which housing benefit is payable;
(c) in relation to an amount mentioned in sub-paragraph (5)(c), (d) or (e), means—
(i) a period of less than a week which is the whole period for which income support, an income-related employment and support allowance or, as the case may be, an income-based jobseeker's allowance is payable; and
(ii) any other period of less than a week for which it is payable;
“relevant week” means the support week or part-week in which the capital in question of which the applicant has deprived himself within the meaning of paragraph 67(1)—
(a) was first taken into account for the purpose of determining his entitlement to support; or
(b) was taken into account on a subsequent occasion for the purpose of determining or re-determining his entitlement to support on that subsequent occasion and that determination or re-determination resulted in his beginning to receive, or ceasing to receive, support;
and where more than one support week is identified by reference to paragraphs (a) and (b) of this definition, the later or latest such support week or, as the case may be, the later or latest such part-week is the relevant week;
“relevant subsequent week” means the support week or part-week which includes the day on which the further application or, if more than one further application has been made, the last such application was made.

69.0 Diminishing notional capital rule: persons who are not pensioners

(1) Where an applicant who is not a pensioner is treated as possessing capital under paragraph 67(1) (notional capital), the amount which he is treated as possessing—
(a) in the case of a week that is subsequent to—
(i) the relevant week in respect of which the conditions set out in sub-paragraph (2) are satisfied; or
(ii) a week which follows that relevant week and which satisfies those conditions, is to be reduced by an amount determined under sub-paragraph (3);
(b) in the case of a week in respect of which sub-paragraph (1)(a) does not apply but where—
(i) that week is a week subsequent to the relevant week; and
(ii) that relevant week is a week in which the condition in sub-paragraph (4) is satisfied, is to be reduced by the amount determined under sub-paragraph (5).

(2) This sub-paragraph applies to a support week (or, in the case of persons who are not pensioners, part-week) where the applicant satisfies the conditions that—
(a) he is in receipt of a reduction in council tax under this scheme; and
(b) but for paragraph 67(1), he would have received a greater reduction in council tax under this scheme in that week.

(3) In a case to which sub-paragraph (2) applies, the amount of the reduction in the amount of capital he is treated as possessing for the purposes of sub-paragraph (1)(a) is equal to the aggregate of—
(a) an amount equal to the additional amount of the reduction in council tax to which
sub-paragraph (2)(b) refers;
(b) where the applicant has also claimed housing benefit, the amount of any housing benefit or any additional amount of that benefit to which he would have been entitled in respect of the whole or part of the support week to which sub-paragraph (2) refers but for the application of regulation 49(1) of the Housing Benefit Regulations 2006 (notional capital);
(c) where the applicant has also claimed income support, the amount of income support to which he would have been entitled in respect of the whole or part of the support week to which sub-paragraph (2) refers but for the application of regulation 51(1) of the Income Support (General) Regulations 1987 (notional capital);
(d) where the applicant has also claimed a jobseeker’s allowance, the amount of an income-based jobseeker’s allowance to which he would have been entitled in respect of the whole or part of the support week to which sub-paragraph (2) refers but for the application of regulation 113 of the Jobseeker’s Allowance Regulations 1996 (notional capital); and
(e) where the applicant has also claimed an employment and support allowance, the amount of an income-related employment and support allowance to which he would have been entitled in respect of the whole or part of the support week to which sub-paragraph (2) refers but for the application of regulation 115 of the Employment and Support Allowance Regulations 2008 (notional capital).

(4) Subject to sub-paragraph (7), for the purposes of sub-paragraph (1)(b) the condition is that the applicant is not a pensioner and would have been entitled to a reduction in council tax in the relevant week but for paragraph 67(1).

(5) In such a case the amount of the reduction in the amount of capital he is treated as possessing must be equal to the aggregate of—
(a) the amount of council tax benefit to which the applicant would have been entitled in the relevant week but for paragraph 67(1);
(b) if the applicant would, but for regulation 49(1) of the Housing Benefit Regulations 2006, have been entitled to housing benefit or to an additional amount of housing benefit in respect of the benefit week which includes the last day of the relevant week, the amount which is equal to—
(i) in a case where no housing benefit is payable, the amount to which he would have been entitled; or
(ii) in any other case, the amount equal to the additional amount of housing benefit to which he would have been entitled;
(c) if the applicant would, but for regulation 51(1) of the Income Support (General) Regulations 1987, have been entitled to income support in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled;
(d) if the applicant would, but for regulation 113 of the Jobseeker’s Allowance Regulations 1996, have been entitled to an income-based jobseeker’s allowance in respect of the benefit week, within the meaning of regulation 1(3) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled; and
(e) if the applicant would, but for regulation 115 of the Employment and Support Allowance Regulations 2008, have been entitled to an income-related employment and support allowance in respect of the benefit week, within the meaning of regulation 2(1) of those Regulations (interpretation), which includes the last day of the relevant week, the amount to which he would have been entitled.

(6) But if the amount mentioned in paragraph (a), (b), (c), (d) or (e) of sub-paragraph (5) (“the relevant amount”) is in respect of a part-week, the amount that is to be taken into account under that paragraph is to be determined by—
(a) dividing the relevant amount by the number equal to the number of days in that
part-week, and
(b) multiplying the result of that calculation by 7.

(7) The amount determined under sub-paragraph (5) is to be re-determined under the
appropriate sub-paragraph if the applicant makes a further application and the conditions
in sub-paragraph (8) are satisfied, and in such a case—
(a) paragraphs (a) to (e) of sub-paragraph (5) apply as if for the words ““relevant
week”” there were substituted the words ““relevant subsequent week””; and
(b) subject to sub-paragraph (9), the amount as re-determined has effect from the first
week following the relevant subsequent week in question.

(8) The conditions are that—
(a) a further application is made 26 or more weeks after—
(i) the date on which the applicant made an application for support under this
scheme in respect of which he was first treated as possessing the capital in
question under paragraph 67(1);
(ii) in a case where there has been at least one re-determination in accordance
with sub-paragraph (7), the date on which he last made an application under
this scheme which resulted in the weekly amount being re-determined, or
(iii) the date on which he last ceased to be entitled to support under this scheme,
whichever last occurred; and
(b) the applicant would have been entitled to support under this scheme but for
paragraph 67(1).

(9) The amount as re-determined pursuant to sub-paragraph (6) must not have effect if it is
less than the amount which applied in that case immediately before the re-determination
and in such a case the higher amount must continue to have effect.

(10) For the purposes of this paragraph—
“part-week”
(a) in relation to an amount mentioned in sub-paragraph (5)(a), means a period of less
than a week for which support under this scheme is allowed;
(b) in relation to an amount mentioned in sub-paragraph (5)(b), means a period of less
than a week for which housing benefit is payable;
(c) in relation to an amount mentioned in sub-paragraph (5)(c), (d) or (e), means—
(i) a period of less than a week which is the whole period for which income
support, an income-related employment and support allowance or, as the
case may be, an income-based jobseeker’s allowance is payable; and
(ii) any other period of less than a week for which it is payable;

“relevant week” means the support week or part-week in which the capital in question
of which the applicant has deprived himself within the meaning of paragraph 67(1)—(a)
was first taken into account for the purpose of determining his entitlement to support; or

(b) was taken into account on a subsequent occasion for the purpose of determining or
re-determining his entitlement to support on that subsequent occasion and that
determination or re-determination resulted in his beginning to receive, or ceasing
to receive, support,

and where more than one support week is identified by reference to paragraphs (a) and
(b) of this definition, the later or latest such support week or, as the case may be, the
later or latest such part-week is the relevant week;

“relevant subsequent week” means the support week or part-week which includes the
day on which the further application or, if more than one further application has been
made, the last such application was made.
70.0 Capital jointly held

Except where an applicant possesses capital which is disregarded under paragraph 67(7) (notional capital), where an applicant and one or more persons are beneficially entitled in possession to any capital asset they must be treated, in the absence of evidence to the contrary, as if each of them were entitled in possession to the whole beneficial interest therein in an equal share and the foregoing provisions of this Chapter apply for the purposes of calculating the amount of capital which the applicant is treated as possessing as if it were actual capital which the applicant does possess.

71.0 Calculation of tariff income from capital: pensioners

The capital of an applicant who is a pensioner, calculated in accordance with this Part, is to be treated as if it were a weekly income of—
(a) £1 for each £500 in excess of £10,000 but not exceeding £16,000; and
(b) £1 for any excess which is not a complete £500.

72.0 Calculation of tariff income from capital: persons who are not pensioners

The capital of an applicant who is not a pensioner, calculated in accordance with this Part 109, is to be treated as if it were a weekly income of—
(a) £1 for each £250 in excess of £6,000 but not exceeding £16,000;
(b) £1 for any excess which is not a complete £250.
PART 11 Students

CHAPTER 1 General

73.0 Interpretation

(1) In this Part—
“academic year” means the period of twelve months beginning on 1st January, 1st April, 1st July or 1st September according to whether the course in question begins in the winter, the spring, the summer or the autumn respectively but if students are required to begin attending the course during August or September and to continue attending through the autumn, the academic year of the course is to be considered to begin in the autumn rather than the summer;
“access funds” means
(a) grants made under section 68 of the Further and Higher Education Act 1992 for the purpose of providing funds on a discretionary basis to be paid to students;
(b) grants made under sections 73(a) and (c) and 74(1) of the Education (Scotland) Act 1980;
(c) grants made under Article 30 of the Education and Libraries (Northern Ireland) Order 1993 or grants, loans or other payments made under Article 5 of the Further Education (Northern Ireland) Order 1997 in each case being grants, or grants, loans or other payments as the case may be, for the purpose of assisting students in financial difficulties;
(d) discretionary payments, known as “learner support funds”, which are made available to students in further education by institutions out of funds provided by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding under sections 100 and 101 of the Apprenticeships, Skills, Children and Learning Act 2009; or
(e) Financial Contingency Funds made available by the Welsh Ministers;
“college of further education” means a college of further education within the meaning of Part 1 of the Further and Higher Education (Scotland) Act 1992;
“contribution” means
(a) any contribution in respect of the income of a student or any person which the Secretary of State, the Scottish Ministers or an education authority takes into account in ascertaining the amount of a student's grant or student loan; or
(b) any sums, which in determining the amount of a student’s allowance or bursary in Scotland under the Education (Scotland) Act 1980, the Scottish Ministers or education authority takes into account being sums which the Scottish Ministers or education authority considers that it is reasonable for the following persons to contribute towards the holder's expenses—
(i) the holder of the allowance or bursary;
(ii) the holder's parents;
(iii) the holder's parent's spouse, civil partner or a person ordinarily living with the holder's parent as if he or she were the spouse or civil partner of that parent; or
(iv) the holder’s spouse or civil partner;
“course of study” means any course of study, whether or not it is a sandwich course and whether or not a grant is made for attending or undertaking it;
“covenant income” means the gross income payable to a full-time student under a Deed of Covenant by his parent;
“education authority” means a government department, a local authority as defined in section 579 of the Education Act 1996 (interpretation), a local education authority as defined in section 123 of the Local Government (Scotland) Act 1973, an education and library board established under Article 3 of the Education and Libraries (Northern Ireland) Order 1986, any body that is a research council for the purposes of the Science and
Technology Act 1965 or any analogous government department, authority, board or body, of the Channel Islands, Isle of Man or any other country outside Great Britain;

“full-time course of study” means a full-time course of study which
(a) is not funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers or a full-time course of study which is not funded in whole or in part by the Scottish Ministers at a college of further education or a full-time course of study which is a course of higher education and is funded in whole or in part by the Scottish Ministers;
(b) is funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers if it involves more than 16 guided learning hours per week for the student in question, according to the number of guided learning hours per week for that student set out—
(i) in the case of a course funded by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding, in the student’s learning agreement signed on behalf of the establishment which is funded by either of those persons for the delivery of that course; or
(ii) in the case of a course funded by the Welsh Ministers, in a document signed on behalf of the establishment which is funded by that Council for the delivery of that course; or
(c) is not higher education and is funded in whole or in part by the Scottish Ministers at a college of further education and involves—
(i) more than 16 hours per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff according to the number of hours set out in a document signed on behalf of the college; or
(ii) 16 hours or less per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff and additional hours using structured learning packages supported by the teaching staff where the combined total of hours exceeds 21 hours per week, according to the number of hours set out in a document signed on behalf of the college;

“full-time student” means a person attending or undertaking a full-time course of study and includes a student on a sandwich course;

“grant” (except in the definition of “access funds”) means any kind of educational grant or award and includes any scholarship, studentship, exhibition, allowance or bursary but does not include a payment from access funds or any payment to which paragraph 16 of Schedule 8 or paragraph 55 of Schedule 10 (allowances and payments for courses of study) applies;

“grant income” means
(a) any income by way of a grant;
(b) any contribution whether or not it is paid;

“higher education” means higher education within the meaning of Part 2 of the Further and Higher Education (Scotland) Act 1992;

“last day of the course” means
(a) in the case of a qualifying course, the date on which the last day of that course falls or the date on which the final examination relating to that course is completed, whichever is the later;
(b) in any other case, the date on which the last day of the final academic term falls in respect of the course in which the student is enrolled;

“period of study” means
(a) in the case of a course of study for one year or less, the period beginning with the start of the course and ending with the last day of the course;
(b) in the case of a course of study for more than one year, in the first or, as the case may be, any subsequent year of the course, other than the final year of the course, the period beginning with the start of the course or, as the case may be, that year’s start and ending with either—
(i) the day before the start of the next year of the course in a case where the
student’s grant or loan is assessed at a rate appropriate to his studying throughout the year or, if he does not have a grant or loan, where a loan would have been assessed at such a rate had he had one; or

(ii) in any other case, the day before the start of the normal summer vacation appropriate to his course;

(c) in the final year of a course of study of more than one year, the period beginning with that year’s start and ending with the last day of the course;

“periods of experience” means periods of work experience which form part of a sandwich course;

“qualifying course” means a qualifying course as defined for the purposes of Parts 2 and 4 of the Jobseeker’s Allowance Regulations 1996;

“sandwich course” has the meaning prescribed in regulation 2(9) of the Education (Student Support) Regulations 2008, regulation 4(2) of the Education (Student Loans) (Scotland) Regulations 2007 or regulation 2(8) of the Education (Student Support) Regulations (Northern Ireland) 2007, as the case may be;

“standard maintenance grant” means

(a) except where paragraph (b) or (c) applies, in the case of a student attending or undertaking a course of study at the University of London or an establishment within the area comprising the City of London and the Metropolitan Police District, the amount specified for the time being in paragraph 2(2)(a) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 (“the 2003 Regulations”) for such a student;

(b) except where paragraph (c) applies, in the case of a student residing at his parent’s home, the amount specified in paragraph 3 thereof;

(c) in the case of a student receiving an allowance or bursary under the Education (Scotland) Act 1980, the amount of money specified as “standard maintenance allowance” for the relevant year appropriate for the student set out in the Student Support in Scotland Guide issued by the Student Awards Agency for Scotland, or its nearest equivalent in the case of a bursary provided by a college of further education or a local education authority;

(d) in any other case, the amount specified in paragraph 2(2) of Schedule 2 to the 2003 Regulations other than in sub-paragraph (a) or (b) thereof;

“student” means a person, other than a person in receipt of a training allowance, who is attending or undertaking

(a) a course of study at an educational establishment; or

(b) a qualifying course;

“student loan” means a loan towards a student’s maintenance pursuant to any regulations made under section 22 of the Teaching and Higher Education Act 1998, section 73 of the Education (Scotland) Act 1980 or Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 and includes, in Scotland, a young student’s bursary paid under regulation 4(1)(c) of the Students’ Allowances (Scotland) Regulations 2007.

(2) For the purposes of the definition of “full-time student” in sub-paragraph (1), a person must be regarded as attending or, as the case may be, undertaking a full-time course of study or as being on a sandwich course—(a) subject to sub-paragraph (3), in the case of a person attending or undertaking a part of a modular course which would be a full-time course of study for the purposes of this Part, for the period beginning on the day on which that part of the course starts and ending—

(i) on the last day on which he is registered with the educational establishment as attending or undertaking that part as a full-time course of study; or

(ii) on such earlier date (if any) as he finally abandons the course or is dismissed from it;

(b) in any other case, throughout the period beginning on the date on which he starts attending or undertaking the course and ending on the last day of the course or on such earlier date (if any) as he finally abandons it or is dismissed from it.

(3) For the purposes of paragraph (a) of sub-paragraph (2), the period referred to in that
paragraph includes—
(a) where a person has failed examinations or has failed successfully to complete a module relating to a period when he was attending or undertaking a part of the course as a full-time course of study, any period in respect of which he attends or undertakes the course for the purpose of retaking those examinations or that module;
(b) any period of vacation within the period specified in that paragraph or immediately following that period except where the person has registered with the educational establishment to attend or undertake the final module in the course and the vacation immediately follows the last day on which he is required to attend or undertake the course.

(4) In sub-paragraph (2), “modular course” means a course of study which consists of two or more modules, the successful completion of a specified number of which is required before a person is considered by the educational establishment to have completed the course.

74.0 Treatment of students

This scheme has effect in relation to students who are not pensioners subject to the following provisions of this Part.

75.0 Students who are excluded from entitlement to support under this scheme

(1) The students who are excluded from entitlement to support under this scheme are, subject to sub-paragraphs (2) and (7)—
(a) full-time students, and
(b) students who are persons treated as not being in Great Britain.

(2) Sub-paragraph (1)(b) does not apply to a student—
(a) who is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance;
(b) who is a lone parent;
(c) whose applicable amount would, but for this paragraph, include the disability premium or severe disability premium;
(d) whose applicable amount would include the disability premium but for his being treated as capable of work by virtue of a determination made in accordance with regulations made under section 171E of the SSCBA;
(e) who is, or is treated as, incapable of work and has been so incapable, or has been so treated as incapable, of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work) for a continuous period of not less than 196 days; and for this purpose any two or more separate periods separated by a break of not more than 56 days must be treated as one continuous period;
(f) who has, or is treated as having, limited capability for work and has had, or been treated as having, limited capability for work in accordance with the Employment and Support Allowance Regulations 2008 for a continuous period of not less than 196 days, and for this purpose any two or more separate periods separated by a break of not more than 84 days must be treated as one continuous period;
(g) who has a partner who is also a full-time student, if he or that partner is treated as responsible for a child or young person;
(h) who is a single applicant with whom a child is placed by a local authority or voluntary organisation within the meaning of the Children Act 1989 or, in Scotland, boarded out within the meaning of the Social Work (Scotland) Act 1968;
(i) who is—
(i) aged under 21 and whose course of study is not a course of higher education,
(ii) aged 21 and attained that age during a course of study which is not a course
of higher education, or
(iii) a qualifying young person or child within the meaning of section 142 of the
SSCBA (child and qualifying young person);

(j) in respect of whom—
(i) a supplementary requirement has been determined under paragraph 9 of Part
2 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003;
(ii) an allowance, or as the case may be, bursary has been granted which includes
a sum under paragraph (1)(d) of regulation 4 of the Students’ Allowances
(Scotland) Regulations 1999 or, as the case may be, under paragraph (1)(d) of
regulation 4 of the Education Authority (Bursaries) (Scotland) Regulations
1995, in respect of expenses incurred;
(iii) a payment has been made under or by virtue of regulations made under the
Teaching and Higher Education Act 1998;
(iv) a grant has been made under regulation 13 of the Education (Student
Support) Regulations 2005 or under regulation 13 of the Education (Student
Support) Regulations (Northern Ireland) 2000; or
(v) a supplementary requirement has been determined under paragraph 9 of
Schedule 6 to the Students Awards Regulations (Northern Ireland) 1999 or a
payment has been made under Article 50(3) of the Education and Libraries
(Northern Ireland) Order 1986,
on account of his disability by reason of deafness.

(3) Sub-paragraph (2)(j)(ii) only applies to an applicant until the end of the course during
which the applicant attained the age of 21.

(4) For the purposes of sub-paragraph (2), once sub-paragraph (2)(e) applies to a full-time
student, if he then ceases, for a period of 56 days or less, to be incapable, or to be treated
as incapable, of work, that sub-paragraph must, on his again becoming so incapable, or so
treated as incapable, of work at the end of that period, immediately thereafter apply to
him for so long as he remains incapable or is treated as remaining incapable, of work.

(5) In sub-paragraph (2)(i) the reference to a course of higher education is a reference to a
course of any description mentioned in Schedule 6 to the Education Reform Act 1988.

(6) A full-time student to whom sub-paragraph (2)(i) applies must be treated as satisfying that
sub-paragraph from the date on which he made a request for the supplementary
requirement, allowance, bursary or payment as the case may be.

(7) Sub-paragraph (1)(b) does not apply to a full-time student for the period specified in sub-
paragraph (8) if—
(a) at any time during an academic year, with the consent of the relevant educational
establishment, he ceases to attend or undertake a course because he is—
(i) engaged in caring for another person; or
(ii) ill;
(b) he has subsequently ceased to be engaged in caring for that person or, as the case
may be, he has subsequently recovered from that illness; and
(c) he is not eligible for a grant or a student loan in respect of the period specified in
sub-paragraph (8).

(8) The period specified for the purposes of sub-paragraph (7) is the period, not exceeding
one year, beginning on the day on which he ceased to be engaged in caring for that
person or, as the case may be, the day on which he recovered from that illness and ending
on the day before—
(a) the day on which he resumes attending or undertaking the course; or
(b) the day from which the relevant educational establishment has agreed that he may
resume attending or undertaking the course,
whichever first occurs.
CHAPTER 2 Income

76.0 Calculation of grant income

(1) The amount of a student’s grant income to be taken into account in assessing his income must, subject to sub-paragraphs (2) and (3), be the whole of his grant income.

(2) There must be excluded from a student’s grant income any payment—
   (a) intended to meet tuition fees or examination fees;
   (b) in respect of the student’s disability;
   (c) intended to meet additional expenditure connected with term time residential study away from the student’s educational establishment;
   (d) on account of the student maintaining a home at a place other than that at which he resides during his course;
   (e) on account of any other person but only if that person is residing outside the United Kingdom and there is no applicable amount in respect of him;
   (f) intended to meet the cost of books and equipment;
   (g) intended to meet travel expenses incurred as a result of his attendance on the course;
   (h) intended for the child care costs of a child dependant;
   (i) of higher education bursary for care leavers made under Part 3 of the Children Act 1989.

(3) Where a student does not have a student loan and is not treated as possessing such a loan, there must be excluded from the student's grant income—
   (a) the sum of £303 per academic year in respect of travel costs; and
   (b) the sum of £390 per academic year towards the costs of books and equipment, whether or not any such costs are incurred.

(4) There must also be excluded from a student's grant income the grant for dependants known as the parents’ learning allowance paid pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 or section 22 of the Teaching and Higher Education Act 1998.

(5) Subject to sub-paragraphs (6) and (7), a student’s grant income must be apportioned—
   (a) subject to sub-paragraph (8), in a case where it is attributable to the period of study, equally between the weeks in that period beginning with the support week, the first day of which coincides with, or immediately follows, the first day of the period of study and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of the period of study;
   (b) in any other case, equally between the weeks in the period beginning with the support week, the first day of which coincides with, or immediately follows, the first day of the period for which it is payable and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of the period for which it is payable.

(6) Any grant in respect of dependants paid under section 63(6) of the Health Services and Public Health Act 1968 (grants in respect of the provision of instruction to officers of hospital authorities) and any amount intended for the maintenance of dependants under Part 3 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 must be apportioned equally over the period of 52 weeks or, if there are 53 support weeks (including part-weeks) in the year, 53.

(7) In a case where a student is in receipt of a student loan or where he could have acquired a student loan by taking reasonable steps but had not done so, any amount intended for the maintenance of dependants to which neither sub-paragraph (6) nor paragraph 80(2) (other amounts to be disregarded) applies, must be apportioned over the same period as the student’s loan is apportioned or, as the case may be, would have been apportioned.
(8) In the case of a student on a sandwich course, any periods of experience within the period of study must be excluded and the student’s grant income must be apportioned equally between the weeks in the period beginning with the support week, the first day of which immediately follows the last day of the period of experience and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of the period of study.

77.0 Calculation of covenant income where a contribution is assessed

(1) Where a student is in receipt of income by way of a grant during a period of study and a contribution has been assessed, the amount of his covenant income to be taken into account for that period and any summer vacation immediately following must be the whole amount of the covenant income less, subject to sub-paragraph (3), the amount of the contribution.

(2) The weekly amount of the student’s covenant must be determined—
   (a) by dividing the amount of income which falls to be taken into account under sub-paragraph (1) by 52 or 53, whichever is reasonable in the circumstances; and
   (b) by disregarding £5 from the resulting amount.

(3) For the purposes of sub-paragraph (1), the contribution must be treated as increased by the amount (if any) by which the amount excluded under paragraph 76(2)(g) falls short of the amount specified in paragraph 7(2) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 (travel expenditure).

78.0 Covenant income where no grant income or no contribution is assessed

(1) Where a student is not in receipt of income by way of a grant the amount of his covenant income must be calculated as follows—
   (a) any sums intended for any expenditure specified in paragraph 76(2)(a) to (e) necessary as a result of his attendance on the course must be disregarded;
   (b) any covenant income, up to the amount of the standard maintenance grant, which is not so disregarded, must be apportioned equally between the weeks of the period of study;
   (c) there must be disregarded from the amount so apportioned the amount which would have been disregarded under paragraph 76(2)(f) and (3) had the student been in receipt of the standard maintenance grant; and
   (d) the balance, if any, must be divided by 52 or 53 whichever is reasonable in the circumstances and treated as weekly income of which £5 must be disregarded.

(2) Where a student is in receipt of income by way of a grant and no contribution has been assessed, the amount of his covenanted income must be calculated in accordance with paragraphs (a) to (d) of sub-paragraph (1), except that—
   (a) the value of the standard maintenance grant must be abated by the amount of such grant income less an amount equal to the amount of any sums disregarded under paragraph 76(2)(a) to (e); and
   (b) the amount to be disregarded under sub-paragraph (1) (c) must be abated by an amount equal to the amount of any sums disregarded under paragraph 76(2)(f) and (g) and (3).

79.0 Relationship with amounts to be disregarded under Schedule 8

No part of a student’s covenant income or grant income is to be disregarded under paragraph 19 of Schedule 8 (disregard of certain charitable and voluntary, etc., payments).
80.0 Other amounts to be disregarded

(1) For the purposes of ascertaining income other than grant income, covenant income and loans treated as income in accordance with paragraph 81 (treatment of student loans), any amounts intended for any expenditure specified in paragraph 76(2) (calculation of grant income), necessary as a result of his attendance on the course must be disregarded.

(2) But sub-paragraph (1) applies only if, and to the extent that, the necessary expenditure exceeds or is likely to exceed the amount of the sums disregarded under paragraph 76(2) or (3), 77(3), 78(1)(a) or (c) or 81(5) (calculation of grant income, covenant income and treatment of student loans) on like expenditure.

81.0 Treatment of student loans

(1) A student loan is to be treated as income.

(2) In calculating the weekly amount of the loan to be taken into account as income—
   (a) in respect of a course that is of a single academic year’s duration or less, a loan which is payable in respect of that period is to be apportioned equally between the weeks in the period beginning with—
      (i) except in a case where sub-paragraph (ii) applies, the support week, the first day of which coincides with, or immediately follows, the first day of the single academic year;
      (ii) where the student is required to start attending the course in August or where the course is less than an academic year’s duration, the support week, the first day of which coincides with, or immediately follows, the first day of the course,
      and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of the course;
   (b) in respect of an academic year of a course which starts other than on 1st September, a loan which is payable in respect of that academic year is to be apportioned equally between the weeks in the period—
      (i) beginning with the support week, the first day of which coincides with or immediately follows, the first day of that academic year, and
      (ii) ending with the support week, the last day of which coincides with or immediately precedes, the last day of that academic year,
   but excluding any support weeks falling entirely within the quarter during which, in the opinion of the authority, the longest of any vacation is taken and for the purposes of this paragraph, “quarter” has the same meaning as for the purposes of the Education (Student Support) Regulations 2005;
   (c) in respect of the final academic year of a course (not being a course of a single year’s duration), a loan which is payable in respect of that final academic year is to be apportioned equally between the weeks in the period beginning with—
      (i) except in a case where sub-paragraph (ii) applies, the support week, the first day of which coincides with, or immediately follows, the first day of that academic year;
      (ii) where the final academic year starts on 1st September, the support week, the first day of which coincides with, or immediately follows, the earlier of 1st September or the first day of the autumn term,
      and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of the course;
   (d) in any other case, the loan is to be apportioned equally between the weeks in the period beginning with the earlier of—
      (i) the first day of the first support week in September; or
      (ii) the support week, the first day of which coincides with, or immediately
follows the first day of the autumn term, and ending with the support week, the last day of which coincides with, or immediately precedes, the last day of June, and, in all cases, from the weekly amount so apportioned £10 is to be disregarded.

(3) A student is to be treated as possessing a student loan in respect of an academic year where—
(a) a student loan has been made to him in respect of that year; or
(b) he could acquire such a loan in respect of that year by taking reasonable steps to do so.

(4) Where a student is treated as possessing a student loan under sub-paragraph (3), the amount of the student loan to be taken into account as income must be, subject to sub-paragraph (5)—
(a) in the case of a student to whom a student loan is made in respect of an academic year, a sum equal to—
(i) the maximum student loan he is able to acquire in respect of that year by taking reasonable steps to do so; and
(ii) any contribution whether or not it has been paid to him;
(b) in the case of a student to whom a student loan is not made in respect of an academic year, the maximum student loan that would be made to the student if—
(i) he took all reasonable steps to obtain the maximum student loan he is able to acquire in respect of that year; and
(ii) no deduction in that loan was made by virtue of the application of a means test.

(5) There must be deducted from the amount of income taken into account under sub-paragraph (4)—
(a) the sum of £303 per academic year in respect of travel costs; and
(b) the sum of £390 per academic year towards the cost of books and equipment, whether or not any such costs are incurred.

(6) A loan for fees, known as a fee loan or a fee contribution loan, made pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998, section 22 of the Teaching and Higher Education Act 1998 or section 73(f) of the Education (Scotland) Act 1980, shall be disregarded as income.

82.0 Treatment of payments from access funds

(1) This paragraph applies to payments from access funds that are not payments to which paragraph 85(2) or (3) (income treated as capital) applies.

(2) A payment from access funds, other than a payment to which sub-paragraph (3) applies, must be disregarded as income.

(3) Subject to sub-paragraph (4) of this paragraph and paragraph 40 of Schedule 8 (disregards in the calculation of income other than earnings: persons who are not pensioners)—
(a) any payments from access funds which are intended and used for an item of food, ordinary clothing or footwear, household fuel, or rent of a single applicant or, as the case may be, of the applicant or any other member of his family, and
(b) any payments from access funds which are used for any council tax or water charges for which that applicant or member is liable, must be disregarded as income to the extent of £20 per week.

(4) Where a payment from access funds is made—
(a) on or after 1st September or the first day of the course, whichever first occurs, but before receipt of any student loan in respect of that year and that payment is intended for the purpose of bridging the period until receipt of the student loan; or (b) before the first day of the course to a person in anticipation of that person becoming a student, that payment must be disregarded as income.

83.0 Disregard of contribution

Where the applicant or his partner is a student and, for the purposes of assessing a contribution to the student's grant or student loan, the other partner's income has been taken into account, an amount equal to that contribution must be disregarded for the purposes of assessing that other partner's income.

84.0 Further disregard of student's income

Where any part of a student's income has already been taken into account for the purposes of assessing his entitlement to a grant or student loan, the amount taken into account must be disregarded in assessing that student's income.

85.0 Income treated as capital

(1) Any amount by way of a refund of tax deducted from a student's covenant income must be treated as capital.

(2) An amount paid from access funds as a single lump sum must be treated as capital.

(3) An amount paid from access funds as a single lump sum which is intended and used for an item other than food, ordinary clothing or footwear, household fuel or rent, or which is used for an item other than any council tax or water charges for which that applicant or member is liable, must be disregarded as capital but only for a period of 52 weeks from the date of the payment.

86.0 Disregard of changes occurring during summer vacation

In calculating a student's income the authority must disregard any change in the standard maintenance grant, occurring in the recognised summer vacation appropriate to the student's course, if that vacation does not form part of his period of study from the date on which the change occurred to the end of that vacation.
PART 12 Extended Council Tax Support

CHAPTER 1 Extended support: pensioners

87.0 Extended support: pensioners

1. Paragraphs 88 to 93 apply in relation to applicants who are pensioners.
2. Wherever there is reference to classes A to C within paragraphs 88 to 93, these specifically exclude lone parents with a child under 5 years of age.

88.0 Extended support (qualifying contributory benefits): pensioners

(1) Except in the case of an applicant who is in receipt of state pension credit, an applicant who is entitled to support under this scheme by virtue of falling within any of classes A to C is entitled to extended support (qualifying contributory benefits) where—
   (a) the applicant or the applicant’s partner was entitled to a qualifying contributory benefit;
   (b) entitlement to a qualifying contributory benefit ceased because the applicant or the applicant’s partner—
      (i) commenced employment as an employed or self-employed earner;
      (ii) increased their earnings from such employment; or
      (iii) increased the number of hours worked in such employment, and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more;
   (c) the applicant or the applicant’s partner had been entitled to and in receipt of a qualifying contributory benefit or a combination of qualifying contributory benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying contributory benefit ceased; and
   (d) the applicant or the applicant’s partner was not entitled to and not in receipt of a qualifying income-related benefit in the last support week in which the applicant, or the applicant’s partner, was entitled to a qualifying contributory benefit.

(2) An applicant must be treated as entitled to support under this scheme by virtue of falling within any of classes A to C where—
   (a) the applicant ceased to be entitled to support under this scheme because the applicant vacated the dwelling in which the applicant was resident;
   (b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying contributory benefit ceased, or in the preceding week; and
   (c) entitlement to the qualifying contributory benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

89.0 Duration of extended support period (qualifying contributory benefits): pensioners

(1) Where an applicant is entitled to extended support (qualifying contributory benefits), the extended support period starts on the first day of the support week immediately following the support week in which the applicant, or the applicant’s partner, ceased to be entitled to a qualifying contributory benefit.

(2) For the purpose of sub-paragraph (1), an applicant or an applicant’s partner ceases to be entitled to a qualifying contributory benefit on the day immediately following the last day of entitlement to that benefit.

(3) The extended support period ends—
   (a) at the end of a period of four weeks; or
   (b) on the date on which the applicant who is receiving the extended support
(qualifying contributory benefits) has no liability for council tax, if that occurs first.

90.0 Amount of extended support (qualifying contributory benefits): pensioners

(1) For any week during the extended support period the amount of the extended support (qualifying contributory benefits) the applicant is entitled to is the greater of—
(a) the amount of Council Tax Support to which the applicant was entitled by virtue of falling within any of classes A to C in the last support week before the applicant or the applicant’s partner ceased to be entitled to a qualifying contributory benefit;
(b) the amount of support under this scheme to which the applicant would be entitled under by virtue of falling within any of classes A to C for any support week during the extended support period, if paragraph 88 (extended support (qualifying contributory benefits): pensioners) did not apply to the applicant; or
(c) the amount of support under this scheme to which the applicant’s partner would be entitled by virtue of falling within any of classes A to C, if paragraph 88 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of an extended support (qualifying contributory benefits) under this paragraph and the applicant’s partner makes an application for support under this scheme, the authority must not award support in pursuance of that application during the extended support period.

91.0 Extended support (qualifying contributory benefits)—movers: pensioners

(1) This paragraph applies—
(a) to a mover; and
(b) from the Monday following the day of the move.

(2) The amount of the extended support (qualifying contributory benefits) awarded from the Monday from which this paragraph applies until the end of the extended support period is to be the amount of support under this scheme which was payable to the mover for the last support week before the mover, or the mover’s partner, ceased to be entitled to a qualifying contributory benefit.

(3) Where a mover’s liability to pay council tax in respect of the new dwelling is to a second authority, the extended support (qualifying contributory benefits) may take the form of a payment from this authority to—
(a) the second authority; or
(b) the mover directly.

92.0 Relationship between extended support (qualifying contributory benefits) and entitlement to support by virtue of classes A to C

(1) Where an applicant’s support under this scheme would have ended when the applicant ceased to be entitled to a qualifying contributory benefit in the circumstances listed in paragraph 88(1)(b), that support does not cease to have effect until the end of the extended support period.

(2) Part 13 (when entitlement begins and change of circumstances) does not apply to any extended support (qualifying contributory benefits) payable in accordance with paragraph 90(1)(a) or paragraph 91(2) (amount of extended support — movers: pensioners)

93.0 Continuing support where state pension credit claimed: pensioners

(1) This paragraph applies where—
(a) the applicant is entitled to support under this scheme;  
(b) sub-paragraph (2) is satisfied; and  
(c) either—  
   (i) the applicant has attained the qualifying age for state pension credit or, if his entitlement to income-based jobseeker’s allowance or income-related employment and support allowance continued beyond that age, has attained the age of 65; or  
   (ii) the applicant’s partner has actually claimed state pension credit.

(2) This sub-paragraph is only satisfied if the Secretary of State has certified to the authority that the applicant’s partner has actually claimed state pension credit or that—  
(a) the applicant’s award of—  
   (i) income support has terminated because the applicant has attained the qualifying age for state pension credit; or  
   (ii) income-based jobseeker’s allowance or income-related employment and support allowance has terminated because the applicant has attained the qualifying age for state pension credit or the age of 65; and  
(b) the applicant has claimed or is treated as having claimed or is required to make a claim for state pension credit.

(3) Subject to sub-paragraph (4), in a case to which this paragraph applies, a person continues to be entitled to support under this scheme for the period of 4 weeks beginning on the day following the day the applicant’s entitlement to income support or, as the case may be, income-based jobseeker’s allowance, income-related employment and support allowance, ceased, if and for so long as the applicant otherwise satisfies the conditions for entitlement to support under this scheme.

(4) Where support under this scheme is awarded for the period of 4 weeks in accordance with sub-paragraph (3) above, and the last day of that period falls on a day other than the last day of a support week, then support under this scheme must continue to be awarded until the end of the support week in which the last day of that period falls.

(5) Throughout the period of 4 weeks specified in sub-paragraph (3) and any further period specified in sub-paragraph (4)—  
(a) the whole of the income and capital of the applicant is to be disregarded;  
(b) the maximum Council Tax Support amount of the applicant is to be that which was applicable in his case immediately before that period commenced.

(6) The maximum support is to be calculated in accordance with paragraph 29(1) if, since the date it was last calculated—  
(a) the applicant’s council tax liability has increased; or  
(b) a change in the deduction under paragraph 30 falls to be made.

CHAPTER 2 Extended support: persons who are not pensioners (including lone parents with a child under 5 years of age).

94.0 Extended support: persons who are not pensioners, including lone parents with a child under 5 years of age.

Paragraphs 95 to 104 apply in relation to applicants who are not pensioners. Wherever there is reference to classes D to E within paragraphs 95 to 104, these specifically include lone parents with a child under 5 years of age.

95.0 Extended support: persons who are not pensioners, including lone parents with a child under 5 years of age.
(1) An applicant who is entitled to support under this scheme by virtue of falling within any of classes D to E is entitled to extended support where—
   (a) the applicant or the applicant’s partner was entitled to a qualifying income-related benefit;
   (b) entitlement to a qualifying income-related benefit ceased because the applicant or the applicant’s partner—
      (i) commenced employment as an employed or self-employed earner;
      (ii) increased their earnings from such employment; or
      (iii) increased the number of hours worked in such employment, and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more; and
   (c) the applicant or the applicant’s partner had been entitled to and in receipt of a qualifying income-related benefit, jobseeker’s allowance or a combination of those benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying income-related benefit ceased.

(2) For the purpose of sub-paragraph (1)(c), an applicant or an applicant’s partner is to be treated as having been entitled to and in receipt of a qualifying income-related benefit or jobseeker’s allowance during any period of less than five weeks in respect of which the applicant or the applicant’s partner was not entitled to any of those benefits because the applicant or the applicant’s partner was engaged in remunerative work as a consequence of their participation in an employment zone programme.

(3) For the purpose of this paragraph, where an applicant or an applicant’s partner is entitled to and in receipt of joint-claim jobseeker’s allowance they must be treated as being entitled to and in receipt of jobseeker’s allowance.

(4) An applicant must be treated as entitled to support under this scheme by virtue of falling within any of classes D to E where—
   (a) the applicant ceased to be entitled to support under this scheme because the applicant vacated the dwelling in which the applicant was resident;
   (b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying income-related benefit ceased, or in the preceding week; and
   (c) entitlement to the qualifying income-related benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

(5) This paragraph does not apply where, on the day before an applicant’s entitlement to income support ceased, regulation 6(5) of the Income Support (General) Regulations 1987 (remunerative work: housing costs) applied to that applicant.

96.0 Duration of extended support period: persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) Where an applicant is entitled to extended support, the extended support period starts on the first day of the support week immediately following the support week in which the applicant, or the applicant’s partner, ceased to be entitled to a qualifying income-related benefit.

(2) For the purpose of sub-paragraph (1), an applicant or an applicant’s partner ceases to be entitled to a qualifying income-related benefit on the day immediately following the last day of entitlement to that benefit.

(3) The extended support period ends—
   (a) at the end of a period of four weeks; or
   (b) on the date on which the applicant to whom the extended support is payable has no liability for council tax, if that occurs first.
97.0 Amount of extended support: persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) For any week during the extended support period the amount of the extended support to which an applicant is entitled is to be the higher of—
   (a) the amount of support under this scheme to which the applicant was entitled by virtue of falling within any of classes D to E in the last support week before the applicant or the applicant’s partner ceased to be entitled to a qualifying income-related benefit;
   (b) the amount of support under this scheme to which the applicant would be entitled by virtue of falling within any of classes D to E for any support week during the extended support period, if paragraph 95 (extended support: persons who are not pensioners) did not apply to the applicant; or
   (c) the amount of support under this scheme to which the applicant’s partner would be entitled by virtue of falling within any of classes D to E, if paragraph 95 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of extended support under this paragraph and the applicant’s partner makes an application for support under this scheme, no amount of support under this scheme is to be awarded by the authority during the extended support period.

98.0 Extended support—movers: persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) This paragraph applies—
   (a) to a mover; and
   (b) from the Monday following the day of the move.

(2) The amount of extended support awarded from the Monday from which this paragraph applies until the end of the extended support period is to be the amount of support under this scheme to which the mover would have been entitled had they, or their partner, not ceased to be entitled to a qualifying income-related benefit.

(3) Where a mover’s liability to pay council tax in respect of the new dwelling is to a second authority, extended support (qualifying contributory benefits) may take the form of a payment from this authority to—
   (a) the second authority; or
   (b) the mover directly.

99.0 Relationship between extended support and entitlement to support by virtue of classes D to E

(1) Where an applicant’s entitlement to support under this scheme would have ended when the applicant ceased to be entitled to a qualifying income-related benefit in the circumstances listed in paragraph 95(1)(b), that entitlement does not cease until the end of the extended support period.

(2) Paragraphs 106 and 107 do not apply to any extended support payable in accordance with paragraph 95(1)(a) or 98(2) (amount of extended support—movers: persons who are not pensioners).
100.0—Extended support (qualifying contributory benefits): persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) An applicant who is entitled to support under this scheme by virtue of falling within any of classes D to E is entitled to extended support (qualifying contributory benefits) where—
(a) the applicant or the applicant’s partner was entitled to a qualifying contributory benefit;
(b) entitlement to a qualifying contributory benefit ceased because the applicant or the applicant’s partner—
(i) commenced employment as an employed or self-employed earner;
(ii) increased their earnings from such employment; or
(iii) increased the number of hours worked in such employment, and that employment is or, as the case may be, those increased earnings or increased number of hours are expected to last five weeks or more;
(c) the applicant or the applicant’s partner had been entitled to and in receipt of a qualifying contributory benefit or a combination of qualifying contributory benefits for a continuous period of at least 26 weeks before the day on which the entitlement to a qualifying contributory benefit ceased; and
(d) the applicant or the applicant’s partner was not entitled to and not in receipt of a qualifying income-related benefit in the last support week in which the applicant, or the applicant’s partner, was entitled to a qualifying contributory benefit.

(2) An applicant must be treated as entitled to support under this scheme by virtue of falling within any of classes D to E where—
(a) the applicant ceased to be entitled to support under this scheme because the applicant vacated the dwelling in which the applicant was resident;
(b) the day on which the applicant vacated the dwelling was either in the week in which entitlement to a qualifying contributory benefit ceased, or in the preceding week; and
(c) entitlement to the qualifying contributory benefit ceased in any of the circumstances listed in sub-paragraph (1)(b).

101.0 Duration of extended support period (qualifying contributory benefits): persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) Where an applicant is entitled to extended support (qualifying contributory benefits), the extended support period starts on the first day of the support week immediately following the support week in which the applicant, or the applicant’s partner, ceased to be entitled to a qualifying contributory benefit.

(2) For the purpose of sub-paragraph (1), an applicant or an applicant’s partner ceases to be entitled to a qualifying contributory benefit on the day immediately following the last day of entitlement to that benefit.

(3) The extended support period ends—
(a) at the end of a period of four weeks; or
(b) on the date on which the applicant entitled to the extended support (qualifying contributory benefits) has no liability for council tax, if that occurs first.

102.0—Amount of extended support (qualifying contributory benefits): persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) For any week during the extended support period the amount of the extended support (qualifying contributory benefits) payable to an applicant is to be the greater of—
(a) the amount of support under this scheme to which the applicant was entitled by virtue of falling within any of classes D to E in the last support week before the applicant or the applicant’s partner ceased to be entitled to a qualifying
contributory benefit;
(b) the amount of support under this scheme to which the applicant would be entitled by virtue of falling within any of classes D to E for any support week during the extended support period, if paragraph 100 (extended support (qualifying contributory benefits): persons who are not pensioners) did not apply to the applicant; or
(c) the amount of support under this scheme to which the applicant's partner would be entitled by virtue of falling within any of classes D to E, if paragraph 100 did not apply to the applicant.

(2) Sub-paragraph (1) does not apply in the case of a mover.

(3) Where an applicant is in receipt of extended support (qualifying contributory benefits) under this paragraph and the applicant's partner makes an application for support under this scheme, no amount of support may be allowed by the appropriate authority during the extended support period.

103.0 Extended support (qualifying contributory benefits)—movers: persons who are not pensioners, including lone parents with a child under 5 years of age.

(1) This paragraph applies—
(a) to a mover; and
(b) from the Monday following the day of the move.

(2) The amount of extended support (qualifying contributory benefit) payable from the Monday from which this paragraph applies until the end of the extended support period is to be the amount of support under this scheme which was awarded to the mover for the last support week before the mover, or the mover's partner, ceased to be entitled to a qualifying contributory benefit.

(3) Where a mover's liability to pay council tax in respect of the new dwelling is to a second authority, the extended support (qualifying contributory benefits) may take the form of a payment from this authority to—
(a) the second authority; or
(b) the mover directly.

104.0 Relationship between extended support (qualifying contributory benefits) and entitlement to support by virtue of classes D to E

(1) Where an applicant's support under this scheme would have ended when the applicant ceased to be entitled to a qualifying contributory benefit in the circumstances listed in paragraph 100(1)(b), that support does not cease until the end of the extended support period.

(2) Paragraphs 106 and 107 (dates on which entitlement begins and change of circumstances take effect) do not apply to any extended support (qualifying contributory benefits) payable in accordance with paragraph 102(1)(a) or 103(2) (amount of extended support—movers: persons who are not pensioners).

CHAPTER 3 Extended support: movers in the authority's area

105.0 Extended support: applicant moving into the authority's area

Where—
(a) an application is made to the authority ("the current authority") for support under this scheme, and
(b) the applicant, or the partner of the applicant, is in receipt of extended support or an extended reduction from—

(i) another billing authority in England; or
(ii) a billing authority in Wales,
the current authority must reduce any support to which the applicant is entitled under this scheme by the amount of that extended support or reduction.
PART 13 When entitlement begins and change of circumstances takes effect

106.0 Date on which entitlement begins

(1) Subject to sub-paragraph (2), any person by whom or in respect of whom an application for support under this scheme is made and who is otherwise entitled to that support is so entitled from the support week following the date on which that application is made or is treated as made.

(2) Where a person is otherwise entitled to support under this scheme and becomes liable for the first time for the authority's council tax in respect of a dwelling of which he is a resident in the support week in which his application is made or is treated as made, he is so entitled from that support week.

107.0 Date on which change of circumstances is to take effect

(1) Except in cases where paragraph 60 (disregard of changes in tax, contributions, etc.) applies and subject to Paragraph 107A and the following provisions of this paragraph and (in the case of applicants who are pensioners) paragraph 108 (change of circumstance where state pension credit in payment), a change of circumstances which affects entitlement to, or the amount of, support under this scheme (“change of circumstances”), takes effect from the first day of the support week following the date on which the change actually occurs.

(2) Where that change is cessation of entitlement to any benefit under the benefit Acts, the date on which the change actually occurs is the day immediately following the last day of entitlement to that benefit.

(3) Subject to sub-paragraph (4), where the change of circumstances is a change in the amount of council tax payable, it takes effect from the day on which it actually occurs.

(4) Where the change of circumstances is a change in the amount a person is liable to pay in respect of council tax in consequence of regulations under section 13 of the 1992 Act (reduced amounts of council tax) or changes in the discount to which a dwelling may be subject under section 11 or 11A of that Act (discounts), it takes effect from the day on which the change in amount has effect.

(5) Where the change of circumstances is the applicant’s acquisition of a partner, the change takes effect on the day on which the acquisition takes place.

(6) Where the change of circumstances is the death of an applicant's partner or their separation, it takes effect on the day the death or separation occurs.

(7) If two or more changes of circumstances occurring in the same support week would, but for this paragraph, take effect in different support weeks in accordance with sub-paragraphs (1) to (6) they take effect from the day to which the appropriate sub-paragraph from (3) to (6) above refers, or, where more than one day is concerned, from the earlier day.

(8) Where the change of circumstances is that income, or an increase in the amount of income, other than a benefit or an increase in the amount of a benefit under the SSBCBA, is paid in respect of a past period and there was no entitlement to income of that amount during that period, the change of circumstances takes effect from the first day on which such income, had it been paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.
(9) Without prejudice to sub-paragraph (8), where the change of circumstances is the payment of income, or arrears of income, in respect of a past period, the change of circumstances takes effect from the first day on which such income, had it been timeously paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.

(10) Sub-paragraph (11) applies if—
(a) the applicant or his partner has attained the age of 65; and
(b) either—
(i) a non-dependant took up residence in the applicant’s dwelling; or
(ii) there has been a change of circumstances in respect of a non-dependant so that the amount of the deduction which falls to be made under paragraph 30 increased.

(11) Where this sub-paragraph applies, the change of circumstances referred to in sub-paragraph (10)(b) takes effect from the effective date.

(12) In sub-paragraph (11), but subject to sub-paragraph (13), “the effective date” means
(a) where more than one change of a kind referred to in sub-paragraph (10)(b) relating to the same non-dependant has occurred since—
(i) the date on which the applicant’s entitlement to support under this scheme first began; or
(ii) the date which was the last effective date in respect of such a change, whichever is the later, the date which falls 26 weeks after the date on which the first such change occurred;
(b) where paragraph (a) does not apply, the date which falls 26 weeks after the date on which the change referred to in sub-paragraph (10)(b) occurred.

(13) If in any particular case the date determined under sub-paragraph (12) is not the first day of a support week, the effective date in that case is to be the first day of the next support week to commence after the date determined under that sub-paragraph.

107A When beneficial changes of circumstances take effect
(1) for the purposes of determining the date on which a new decision is to take effect, in a case where-
(a) the change of circumstances is a change of circumstances that is required by regulations to be notified; and
(b) that change of circumstances is notified more than one month after it occurs, or such longer period as may be allowed under regulation 107.B; and
(c) the new decision is advantageous to the claimant,

the date of notification of the change of circumstances shall be treated as the date on which the change of circumstances occurred.

107B Conditions for accepting a delay in notification of a change
(1) For the purposes of making a decision under regulation 107.A (1), a longer period of time may be allowed for the notification of a change of circumstances in so far as it affects the effective date of the change where the conditions specified in the following provisions of this regulation are satisfied.

(2) An application for the purposes of paragraph (1) shall
(a) include particulars of the change of circumstances and the reasons for the failure to notify the change of circumstances on an earlier date and
(b) be made within 13 months of the date on which the change occurred.

(3) An application for the purposes of paragraph (1) shall not be granted unless the appropriate relevant authority is satisfied that—
(a) it is reasonable to grant the application;
(b) the change of circumstances notified by the applicant is relevant to the decision which is to be
superseded; and
(c) special circumstances are relevant and as a result of those special circumstances it was not practicable for the applicant to notify the change of circumstances within one month of the change occurring.

(4) In determining whether it is reasonable to grant the application, the appropriate relevant authority shall have regard to the principle that the greater the amount of time that has elapsed between the date one month after the change of circumstances occurred and the date the application for a superseding decision is made, the more compelling should be the special circumstances on which the application is based.

(5) In determining whether it is reasonable to grant an application, no account shall be taken of the following—
(a) that the applicant was unaware of, or misunderstood, the law applicable to his case (including ignorance or misunderstanding of the time limits imposed by these Regulations); or
(b) that the Upper Tribunal or a court has taken a different view of the law from that previously understood and applied.

(6) An application under this regulation which has been refused may not be renewed.

108.0 Change of circumstances where state pension credit in payment

(1) Sub-paragraphs (2) and (3) apply where—
(a) the applicant is in receipt of state pension credit;
(b) the amount of state pension credit awarded to him is changed in consequence of a change in the applicant's circumstances or the correction of an official error; and
(c) the change in the amount of state pension credit payable to the applicant results in a change in the amount of support he receives under this scheme.

(2) Where the change of circumstance is that an increase in the amount of state pension credit payable to the applicant results in—
(a) an increase in the support he receives under this scheme, the change takes effect from the first day of the support week in which state pension credit becomes payable at the increased rate; or
(b) a decrease in the support he receives under this scheme, the change takes effect from the first day of the support week next following the date on which—
(i) the local authority receives notification from the Secretary of State of the increase in the amount of state pension credit; or
(ii) state pension credit is increased, whichever is the later.

(3) Where the change of circumstance (“the relevant change”) is that the applicant's state pension credit has been reduced and in consequence the support the applicant receives under this scheme reduces—
(a) in a case where the applicant's state pension credit has been reduced because the applicant failed to notify the Secretary of State timeously of a change of circumstances, the relevant change takes effect from the first day of the support week from which state pension credit was reduced; or
(b) in any other case the relevant change takes effect from the first day of the support week next following the date on which—
(i) the authority receives notification from the Secretary of State of the reduction in the amount of state pension credit; or
(ii) state pension credit is reduced, whichever is the later.

(4) Where the change of circumstance is that state pension credit is reduced and in consequence of the change, the amount of support he receives under this scheme is increased, the change takes effect from the first day of the support week in which state pension credit becomes payable at the reduced rate.
(5) Where a change of circumstance occurs in that an award of state pension credit has been made to the applicant or his partner and this would result in a decrease in the amount of support he receives under this scheme, the change takes effect from the first day of the support week next following the date on which—
(a) the authority receives notification from the Secretary of State of the award of state pension credit; or
(b) entitlement to state pension credit begins, whichever is the later.

(6) Where, in the case of an applicant who, or whose partner, is or has been awarded state pension credit comprising only the savings credit, there is—
(a) a change of circumstances of a kind described in any of sub-paragraphs (2) to (5) which results from a relevant calculation or estimate; and
(b) a change of circumstances which is a relevant determination,
each of which results in a change in the amount of support the applicant receives under this scheme, the change of circumstances referred to in sub-paragraph (b) takes effect from the day specified in sub-paragraph (2), (3), (4) or (5) as the case may be, in relation to the change referred to in paragraph (a).

(7) Where a change of circumstance occurs in that a guarantee credit has been awarded to the applicant or his partner and this would result in an increase in the amount of support the applicant receives under this scheme, the change takes effect from the first day of the support week next following the date in respect of which the guarantee credit is first payable.

(8) Where a change of circumstances would, but for this sub-paragraph, take effect under the preceding provisions of this paragraph within the 4 week period specified in paragraph 93 (continuing support where state pension credit claimed), that change takes effect on the first day of the first support week to commence after the expiry of the 4 week period.

(9) In this paragraph—
“official error” means an error made by
(a) the authority or a person—
(i) authorised to carry out any function of the authority relating to this scheme; or
(ii) providing services relating to this scheme directly or indirectly to the authority; or
(b) an officer of—
(i) the Department for Work and Pensions; or
(ii) the Commissioners of Inland Revenue,
acting as such,
but excludes any error caused wholly or partly by any person or body not specified in paragraph (a) or (b) of this definition and any error of law which is shown to have been an error only by virtue of a subsequent decision of the court;
“relevant calculation or estimate” means the calculation or estimate made by the Secretary of State of the applicant’s or, as the case may be, the applicant’s partner’s income and capital for the purposes of the award of state pension credit;
“relevant determination” means a change in the determination by the authority of the applicant’s income and capital using the relevant calculation or estimate, in accordance with paragraph 36(1).
PART 14 Application (including duties to notify authority of change of circumstances)

109.0 Making an application

(1) In the case of—
(a) a couple or (subject to paragraph (b)) members of a polygamous marriage an application is to be made by whichever one of them they agree should so apply or, in default of agreement, by such one of them as the authority determines; or
(b) in the case of members of a polygamous marriage to whom paragraph 37 (income and capital: award of universal credit) applies, an application is to be made by whichever one of the parties to the earliest marriage that still subsists they agree should so apply or, in default of agreement, by such one of them as the authority determines.

(2) Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act, and—
(a) a deputy has been appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
(b) in Scotland, his estate is being administered by a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on his behalf; or
(c) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,

that deputy, judicial factor, guardian or attorney, as the case may be, may make an application on behalf of that person.

(3) Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act and sub-paragraph (2) does not apply to him, the authority may, upon written application made to them by a person who, if a natural person, is over the age of 18, appoint that person to exercise on behalf of the person who is unable to act, any right to which that person might be entitled under this scheme and to receive and deal on his behalf with any sums payable to him.

(4) Where a person who is liable to pay council tax in respect of a dwelling is for the time being unable to act and the Secretary of State has appointed a person to act on his behalf under regulation 33 of the Social Security (Claims and Payments) Regulations 1987 (persons unable to act), the authority may if that person agrees, treat him as if he had been appointed by them under sub-paragraph (3).

(5) Where the authority has made an appointment under sub-paragraph (3) or treated a person as an appointee under sub-paragraph (4)—
(a) it may at any time revoke the appointment;
(b) the person appointed may resign his office after having given 4 weeks’ notice in writing to the authority of his intention to do so;
(c) any such appointment must terminate when the authority is notified of the appointment of a person mentioned in sub-paragraph (2).

(6) Anything required by this scheme to be done by or to any person who is for the time being unable to act may be done by or to the persons mentioned in sub-paragraph (2) above or by or to the person appointed or treated as appointed under this paragraph and the receipt of any such person so appointed shall be a good discharge to the authority for any sum paid.
(7) The authority must—
   (a) inform any person making an application of the duty imposed by paragraph 115(1)(a);
   (b) explain the possible consequences (including prosecution) of failing to comply with that duty; and
   (c) set out the circumstances a change in which might affect entitlement to support or its amount.

110.0 Date on which an application is made

(1) Subject to sub-paragraph (7), the date on which an application is made is—
   (a) in a case where—
      (i) an award of state pension credit which comprises a guarantee credit has been made to the applicant or his partner, and
      (ii) the application is made within one month of the date on which the claim for that state pension credit which comprises a guarantee credit was received at the appropriate DWP office,
      the first day of entitlement to state pension credit which comprises a guarantee credit arising from that claim;
   (b) in a case where—
      (i) an applicant or his partner is a person in receipt of a guarantee credit,
      (ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and
      (iii) the application to the authority is received at the designated office within one month of the date of the change,
      the date on which the change takes place;
   (c) in a case where—
      (i) an award of income support, an income-based jobseeker’s allowance or an income-related employment and support allowance or an award of universal credit has been made to the applicant or his partner, and
      (ii) the application is made within one month of the date on which the claim for that income support, jobseeker’s allowance, employment and support allowance or universal credit was received,
      the first day of entitlement to income support, an income-based jobseeker’s allowance, an income-related employment and support allowance or universal credit arising from that claim;
   (d) in a case where—
      (i) an applicant or his partner is a person on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance or has an award of universal credit,
      (ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and
      (iii) the application to the authority is received at the designated office within one month of the date of the change,
      the date on which the change takes place;
   (e) in a case where—
      (i) the applicant is the former partner of a person who was, at the date of his death or their separation, entitled to support under this scheme, and
      (ii) where the applicant makes an application for support under this scheme within one month of the date of the death or the separation,
      the date of the death or separation;
   (f) except where paragraph (a), (b) or (e) is satisfied, in a case where a properly completed application is received within one month (or such longer period as the authority considers reasonable) of the date on which an application form was issued to the applicant following the applicant first notifying, by whatever means, the authority of an intention to make an application, the date of first notification;
   (g) in any other case, the date on which the application is received at the designated
office.

(2) For the purposes only of sub-paragraph (1)(c) a person who has been awarded an income-based jobseeker's allowance or an income-related employment and support allowance is to be treated as entitled to that allowance for any days which immediately precede the first day in that award and on which he would, but for regulations made under—
(a) in the case of income-based jobseeker's allowance, paragraph 4 of Schedule 1 to the Jobseekers Act 1995 (waiting days); or
(b) in the case of income-related employment and support allowance, paragraph 2 of Schedule 2 to the Welfare Reform Act 2007 (waiting days), have been entitled to that allowance.

(3) Where the defect referred to in paragraph 7 of Schedule 1 to this scheme (application by telephone)—
(a) is corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance;
(b) is not corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance where it considers it has sufficient information to decide on the application.

(4) The authority is to treat a defective application as if it had been validly made in the first instance if, in any particular case, the conditions specified in sub-paragraph (5)(a), (b) or (c) are satisfied.

(5) The conditions are that—
(a) where paragraph 4(a) of Schedule 1 (incomplete form) applies, the authority receives at its designated office the properly completed application or the information requested to complete it or the evidence within one month of the request, or such longer period as the authority may consider reasonable; or
(b) where paragraph 4(b) of Schedule 1 (application not on approved form or further information requested by authority) applies—
(i) the approved form sent to the applicant is received at the designated office properly completed within one month of it having been sent to him; or, as the case may be,
(ii) the applicant supplies whatever information or evidence was requested under paragraph 4 of that Schedule within one month of the request, or, in either case, within such longer period as the authority may consider reasonable; or
(c) where the authority has requested further information, the authority receives at its designated office the properly completed application or the information requested to complete it within one month of the request or within such longer period as the authority considers reasonable.

(6) Except in the case of an application made by a person treated as not being in Great Britain, where a person has not become liable for council tax to the authority but it is anticipated that he will become so liable within the period of 8 weeks (the relevant period), he may apply for support under this scheme at any time in that period in respect of that tax and, provided that liability arises within the relevant period, the authority is to treat the application as having been made on the day on which the liability for the tax arises.

(7) Except in the case of an application made by a person treated as not being in Great Britain, where the applicant is not entitled to support under this scheme in the support week immediately following the date of his application but the authority is of the opinion that unless there is a change of circumstances he will be entitled to support under this
scheme for a period beginning not later than—
(a) in the case of an application made by—
   (i) a pensioner, or
   (ii) a person who has attained, or whose partner has attained, the age which is 17
       weeks younger than the qualifying age for state pension credit,
       the seventeenth support week following the date on which the application is made, or
(b) in the case of an application made by a person who is not a pensioner, the
    thirteenth support week following the date on which the application is made,
    the authority may treat the application as made on a date in the support week
    immediately preceding the first support week of that period of entitlement and award
    support accordingly.

(8) In this paragraph “appropriate DWP office” means an office of the Department for Work
    and Pensions dealing with state pension credit or an office which is normally open to the
    public for the receipt of claims for income support, a jobseeker’s allowance or an
    employment and support allowance.

111.0 Back-dating of applications: pensioners or lone parents with a child under 5 years of age

(1) Subject to sub-paragraph (2), the time for the making of an application under this scheme
    by a pensioner is as regards any day on which, apart from satisfying the condition of
    making an application, the applicant is entitled to such support, that day and the period of
    three months immediately following it.

(2) In any case where paragraph 110(1)(a) applies, sub-paragraph (1) does not entitle a
    person to apply for support under this scheme in respect of any day earlier than three
    months before the date on which the claim for state pension credit is made (or treated as
    made by virtue of any provision of the Social Security (Claims and Payments) Regulations
    1987).

112.0 Back-dating of applications: persons who are not pensioners or lone parents with a child
under 5 years of age pensioners or lone parents with a child under 5 years of age

(1) There is no provision to backdate an application for support other than as defined in
paragraph 110.

113.0 Information and evidence

(1) Subject to sub-paragraph (3), a person who makes an application for support under this
scheme must satisfy sub-paragraph (2) in relation both to himself and to any other person
in respect of whom he is making the application.

(2) This sub-paragraph is satisfied in relation to a person if—
   (a) the application is accompanied by—
       (i) a statement of the person’s national insurance number and information or
           evidence establishing that that number has been allocated to the person; or
       (ii) information or evidence enabling the authority to ascertain the national
           insurance number that has been allocated to the person; or
   (b) the person has made an application for a national insurance number to be allocated
       to him and the application for support is accompanied by—
       (i) evidence of the application for a national insurance number to be so allocated;
           and
       (ii) the information or evidence enabling it to be so allocated.

(3) Sub-paragraph (2) does not apply—
   (a) in the case of a child or young person in respect of whom an application for support
is made;
(b) to a person who—
   (i) is a person treated as not being in Great Britain for the purposes of this scheme [18];
   (ii) is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act 1999; and
   (iii) has not previously been allocated a national insurance number.

(4) Subject to sub-paragraph (5), a person who makes an application, or a person to whom support under this scheme has been awarded, must furnish such certificates, documents, information and evidence in connection with the application or the award, or any question arising out of the application or the award, as may reasonably be required by the authority in order to determine that person’s entitlement to, or continuing entitlement to support under this scheme and must do so within one month of the authority requiring him to do so or such longer period as the authority may consider reasonable.

(5) Nothing in this paragraph requires a person to furnish any certificates, documents, information or evidence relating to a payment to which sub-paragraph (7) applies.

(6) Where a request is made under sub-paragraph (4), the authority must—
   (a) inform the applicant or the person to whom support under this scheme has been awarded of his duty under paragraph 115 (duty to notify change of circumstances) to notify the authority of any change of circumstances; and
   (b) without prejudice to the extent of the duty owed under paragraph 115, indicate to him either orally or by notice or by reference to some other document available to him on application and without charge, the kind of change of circumstances which is to be notified.

(7) This sub-paragraph applies to any of the following payments—
   (a) a payment which is—
      (i) disregarded under paragraph 28 of Schedule 8 (sums disregarded in the calculation of income other than earnings: persons who are not pensioners) or paragraph 38 of Schedule 10 (capital disregards: persons who are not pensioners); or
      (ii) made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;
   (b) a payment which is disregarded under paragraph 16 of Schedule 9 (payments made under certain trusts and certain other payments), other than a payment under the Independent Living Fund (2006);
   (c) a payment which is disregarded under paragraph 30(9)(b) or (c) (payment made under certain trusts etc.) or paragraph 2(b) or (c) of Schedule 4 (payments made under certain trusts etc.) other than a payment under the Independent Living Fund (2006).

(8) Where an applicant or a person to whom support under this scheme has been awarded or any partner has attained the qualifying age for state pension credit and is a member of, or a person deriving entitlement to a pension under, a personal pension scheme, he must where the authority so requires furnish the following information—
   (a) the name and address of the pension fund holder;
   (b) such other information including any reference or policy number as is needed to enable the personal pension scheme to be identified.
113A SUSPENSION AND TERMINATION OF SUPPORT AND OTHER MATTERS: persons who are not pensioners or lone parents with a child under 5 years of age

Cases where a relevant authority may suspend
1.—
(1) A relevant authority may suspend, in whole or in part any support in the amount that a person is or will become liable to pay in respect of council tax, in the circumstances prescribed in paragraph (2).
(2) The prescribed circumstances are where—
(a) it appears to the relevant authority that an issue arises whether—
(i) the conditions for entitlement to council tax support are or were fulfilled; or
(ii) a decision as to an award of such a support should be amended as per regulation 107

Making or restoring support suspended
2.—in a case to which regulation 1(2)(a) applies, where the relevant authority is satisfied that the support so suspended is properly payable and no outstanding issues remain to be resolved the relevant authority shall, so far as practicable, restore support within 14 days of the decision to make or restore that support.

Suspension for failure to furnish information etc.
3.—
(1) The relevant authority may suspend in whole or in part—
(a) any reduction in the amount that a person is or will become liable to pay in respect of council tax, in relation to persons who fail to comply with the information requirements as defined in regulation 113
(2) The prescribed persons are—
(a) a person in respect of whom support has been suspended under regulation 1 above;
(b) a person who has made an application for a decision of the relevant authority to be amended;
(c) a person in respect of whom a question has arisen in connection with a support award and who fails to comply with the requirement in regulation 113 to furnish information or evidence needed for a determination whether a decision on an award should be amended.
(3) The relevant authority shall notify any person to whom paragraph (2) refers of the requirements of this regulation.
(4) A person to whom paragraph (2) refers must—
(a) furnish the information or evidence needed within a period of—
(i) one month beginning with the date on which the notification under paragraph (3) was sent to him; or
(ii) such longer period as the relevant authority considers necessary in order to enable him to comply with the requirement; or
(b) satisfy the relevant authority within the period provided for in paragraph (4)(a) that—
(i) the information or evidence so required does not exist; or
(ii) it is not possible for him to obtain the information or evidence so required.
(5) Where a person satisfies the requirements in paragraph (4), the relevant authority shall, so far as practicable, make, or as the case may be restore, the payment within 14 days of the decision to make or restore that payment.

Termination in cases of a failure to furnish information
4.—
(1) A person in respect of whom payment of benefit or support has been suspended—
(a) under regulation 1 and who subsequently fails to comply with an information requirement; or
(b) under regulation 3 for failing to comply with such a requirement,
shall cease to be entitled to support from the date on which support was suspended.
(2) Paragraph (1) does not apply—
(a) subject to sub-paragraph (b), where not more than one month has elapsed since the end of the period under regulation 3(4) for the provision of information;
(b) where support has been suspended in part under regulation 1 or regulation 3.

114.0 Amendment and withdrawal of application

(1) A person who has made an application may amend it at any time before a decision has been made on it by a notice in writing delivered or sent to the designated office.

(2) Where the application was made by telephone in accordance with Part 1 of Schedule 1, the amendment may also be made by telephone.

(3) Any application amended in accordance with sub-paragraph (1) or (2) is to be treated as if it had been amended in the first instance.

(4) A person who has made an application may withdraw it by notice to the designated office at any time before a decision has been made on it.

(5) Where the application was made by telephone in accordance with Part 1 of Schedule 1, the withdrawal may also be made by telephone.

(6) Any notice of withdrawal given in accordance with sub-paragraph (4) or (25) has effect when it is received.

(7) Where a person, by telephone, amends or withdraws an application the person must (if required to do so by the authority) confirm the amendment or withdrawal by a notice in writing delivered or sent to the designated office.

115.0 Duty to notify changes of circumstances

(1) Subject to sub-paragraphs (3), (6) and (7), the applicant (or any person acting on his behalf) must comply with sub-paragraph (2) if there is a relevant change of circumstances at any time—
(a) between the making of an application and a decision being made on it, or
(b) after the decision is made (where the decision is that the applicant is entitled to support under this scheme) including at any time while the applicant is in receipt of such support.

(2) The applicant (or any person acting on his behalf) must notify any change of circumstances which the applicant (or that person) might reasonably be expected to know might affect his entitlement to, or the amount of, support under this scheme (a “relevant change of circumstances”) by giving notice to the authority—
(a) in writing; or
(b) by telephone—
(i) where the authority has published a telephone number for that purpose or for the purposes of Part 1 of Schedule 1 unless the authority determines that in any particular case or class of case notification may not be given by telephone; or
(ii) in any case or class of case where the authority determines that notice may be given by telephone; or
(c) by any other means which the authority agrees to accept in any particular case, within a period of 21 days beginning with the day on which the change occurs, or as soon as reasonably practicable after the change occurs, whichever is later.

(3) The duty imposed on a person by sub-paragraph (1) does not extend to notifying—
(a) changes in the amount of council tax payable to the authority;
(b) changes in the age of the applicant or that of any member of his family;
(c) in the case of an applicant in receipt of a relevant benefit, changes in circumstances which affect the amount of the benefit but not the amount of support under this scheme to which he is entitled, other than the cessation of that entitlement to the benefit.

(4) For the purposes of sub-paragraph (3)(c) “relevant benefit” means income support, an income-based jobseeker’s allowance or an income-related employment and support allowance or universal credit.

(5) Notwithstanding sub-paragraph (3)(b) or (c) an applicant is required by sub-paragraph (1) to notify the authority of any change in the composition of his family arising from the fact that a person who was a member of his family is now no longer such a person because he has ceased to be a child or young person.

(6) The duty imposed on a person by sub-paragraph (1) includes—
(a) in the case of a person falling within class C (pensioners or lone parents with a child under 5 years of age): Alternative Maximum Council Tax Support) giving written notice to the authority of changes which occur in the number of adults in the dwelling or in their total gross incomes and, where any such adult ceases to be in receipt of state pension credit, the date when this occurs.

(7) A person who has been awarded support under this scheme who is also on state pension credit must report—
(a) changes affecting the residence or income of any non-dependant normally residing with the applicant or with whom the applicant normally resides;
(b) any absence from the dwelling which exceeds or is likely to exceed 13 weeks.

(8) In addition to the changes required to be reported under sub-paragraph (7), a person whose state pension credit comprises only the savings credit must also report—
(a) changes affecting a child living with him which may result in a change in the amount of support under this scheme allowed in his case, but not changes in the age of the child;
(b) any change in the amount of the applicant’s capital to be taken into account which does or may take the amount of his capital to more than £16,000;
(c) any change in the income or capital of—
(i) a non-dependant whose income and capital are treated as belonging to the applicant in accordance with paragraph 34 (circumstances in which income of a non-dependant is to be treated as applicant’s); or
(ii) a person to whom paragraph 36(2)(e) (partner treated as member of the household under paragraph 8) refers, and whether such a person or, as the case may be, non-dependant stops living or begins or resumes living with the applicant.

(9) A person who is entitled to support under this scheme and on state pension credit need only report to the authority the changes specified in sub-paragraphs (7) and (8).

**PART 15 Decisions by authority**

116.0 Decision by authority

The authority must make a decision on an application for support under this scheme within 14 days of paragraphs 110 and 113 and Part 1 of Schedule 1 being satisfied, or as soon as reasonably practicable thereafter.
117.0 Notification of decision

(1) The authority must notify in writing any person affected by a decision made by it under this scheme—
   (a) in the case of a decision on an application, forthwith or as soon as reasonably practicable thereafter;
   (b) in any other case, within 14 days of that decision or as soon as reasonably practicable thereafter.

(2) Where the decision is to award support the notification under sub-paragraph (1) must include a statement—
   (a) informing the person affected of the duty imposed by paragraph 115(1)(b);
   (b) explaining the possible consequences (including prosecution) of failing to comply with that duty; and
   (c) setting out the circumstances a change in which might affect entitlement to support or its amount.

(3) Where the decision is to award support, the notification under sub-paragraph (1) must include a statement as to how that entitlement is to be discharged.

(4) In any case, the notification under sub-paragraph (1) must inform the person affected of the procedure by which an appeal may be made and must refer the person to the provisions in this scheme relating to the procedure for making an appeal.

(5) A person affected to whom the authority sends or delivers a notification of decision may, within one month of the date of the notification of that decision request in writing the authority to provide a written statement setting out the reasons for its decision on any matter set out in the notice.

(6) The written statement referred to in sub-paragraph (5) must be sent to the person requesting it within 14 days or as soon as reasonably practicable thereafter.

(7) For the purposes of this paragraph a person is to be treated as a person affected by a decision of the authority under this scheme where the rights, duties or obligations of that person are affected by that decision and the person falls within sub-paragraph (8).

(8) This sub-paragraph applies to—
   (a) the applicant;
   (b) in the case of a person who is liable to pay council tax in respect of a dwelling and is unable for the time being to act—
      (i) a deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
      (ii) in Scotland, a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on the person's behalf; or
      (iii) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,
   (c) a person appointed by the authority under paragraph 109(3).

PART 16 Circumstances in which a payment may be made

118.0 — Payment where there is joint and several liability

(1) Where—
(a) a person is entitled to support under this scheme in respect of his liability for the authority's council tax as it has effect in respect of a financial year; (b) the person entitled to support is jointly and severally liable for the council tax; and (c) the authority determines that discharging his entitlement by reducing the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992 refers would be inappropriate, it may make a payment to him of the amount of support to which he is entitled, rounded where necessary to the nearest penny.

(2) Subject to sub-paragraph (3), any payment made under sub-paragraph (1) must be made to the person who is entitled to support.

(3) Where a person other than the person who is entitled to support under this scheme made the application for support and that first person is a person acting pursuant to an appointment under paragraph 109(3) (persons appointed to act for a person unable to act) or is treated as having been so appointed by virtue of paragraph 109(5), the amount of support may be paid to that person.
Schedule 1
Procedural matters
PART 1 Procedure by which a person may apply for support under this scheme

1. Paragraphs 2 to 7 apply to an application for support under this scheme.

2. An application may be made—
   (a) in writing,
   (b) by means of an electronic communication in accordance with Part 4 of this Schedule, or
   (c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.

3. (1) An application which is made in writing must be made to the designated office on a properly completed form.

   (2) The form must be provided free of charge by the authority for the purpose.

4. (1) Where an application made in writing is defective because—
    (a) it was made on the form supplied for the purpose but that form is not accepted by the authority as being properly completed; or
    (b) it was made in writing but not on the form supplied for the purpose and the authority does not accept the application as being in a written form which is sufficient in the circumstances of the case having regard to the sufficiency of the written information and evidence,
    the authority may, in a case to which sub-paragraph (a) applies, request the applicant to complete the defective application or, in the case to which sub-paragraph (b) applies, supply the applicant with the approved form or request further information and evidence.

   (2) An application made on a form provided by the authority is properly completed if completed in accordance with the instructions on the form, including any instructions to provide information and evidence in connection with the application.

5. (1) If an application made by electronic communication is defective the authority must provide the person making the application with an opportunity to correct the defect.

   (2) An application made by electronic communication is defective if the applicant does not provide all the information the authority requires.

6. In a particular case the authority may determine that an application made by telephone is only valid if the person making the application approves a written statement of his circumstances provided by the authority.

7. (1) If an application made by telephone is defective the authority must provide the person making the application with an opportunity to correct the defect.

   (2) An application made by telephone is defective if the applicant does not provide all the information the authority requests during the telephone call.

PART 2 Procedure by which a person may make an appeal against certain decisions of the authority

8. A person who is aggrieved by a decision of the authority which affects—
   (a) the person’s entitlement to support under this scheme, or
   (b) the amount of any support under this scheme,
     may serve a written notice on the authority stating the matter by which, and the grounds on which, he is aggrieved.
9. The authority must—
   (a) consider the matter to which the notice relates;
   (b) notify the aggrieved person in writing—
       (i) that the ground is not well founded, giving reasons for that belief; or
       (ii) that steps have been taken to deal with the grievance, stating the steps taken.

10. Where, following notification under paragraph 9(b)(i) or (ii), the person is still aggrieved, or if the authority fails to notify the person aggrieved in accordance with paragraph 9(b) within two months of the service of his notice, he may appeal to a valuation tribunal under section 16 of the 1992 Act.

PART 3 Procedure for an application to the authority for support under section 13A(1)(c) of the 1992 Act

11. (1) An application to the authority for support under section 13A(1)(c) of the 1992 Act may be made

   (a) in writing;
   (b) by means of an electronic communication in accordance with Part 4 of this Schedule; or
   (c) where the authority has published a telephone number for the purposes of receiving such applications, by telephone.

   (2) Where—
       (a) the authority has made a determination under section 13A(1)(c) in relation to a class of case in which liability is to be reduced; and
       (b) a person in that class would otherwise be entitled to support under this scheme, that person’s application for support under this scheme may also be treated as an application for support under section 13A(1)(c).

PART 4 Electronic communication

12. Interpretation
   In this Part—
   “information” includes an application, certificate, notice or other evidence;
   “official computer system” means a computer system maintained by or on behalf of the authority for the sending, receiving, processing or storing of any information.

13.— Conditions for the use of electronic communication
   (1) The authority may use an electronic communication in connection with applications for, and awards of, support under this scheme.

   (2) A person other than the authority may use an electronic communication in connection with the matters referred to in sub-paragraph (1) if the conditions specified in sub-paragraphs (3) to (6) are satisfied.

   (3) The first condition is that the person is for the time being permitted to use an electronic communication by an authorisation given by means of a direction of the Chief Executive of the authority.

   (4) The second condition is that the person uses an approved method of—
       (a) authenticating the identity of the sender of the communication;
       (b) electronic communication;
       (c) authenticating any application or notice delivered by means of an electronic communication; and
(d) subject to sub-paragraph (7), submitting to the authority any information.

(5) The third condition is that any information sent by means of an electronic communication is in a form supplied for the purposes of this Part of this Schedule.

(6) The fourth condition is that the person maintains such records in written or electronic form as may be specified in a direction given by the Chief Executive of the authority.

(7) Where the person uses any method other than the method approved of submitting any information, that information is to be treated as not having been submitted.

(8) In this paragraph “approved” means approved by means of a direction given by the Chief Executive of the authority for the purposes of this Part of this Schedule.

14. Use of intermediaries
The authority may use intermediaries in connection with—
(a) the delivery of any information by means of an electronic communication; and
(b) the authentication or security of anything transmitted by such means, and may require other persons to use intermediaries in connection with those matters.

15.— Effect of delivering information by means of electronic communication
(1) Any information which is delivered by means of an electronic communication is to be treated as having been delivered in the manner or form required by any provision of this scheme, on the day the conditions imposed—
(a) by this Part; and
(b) by or under an enactment, are satisfied.

(2) The authority may determine that any information is to be treated as delivered on a different day (whether earlier or later) from the day provided for in sub-paragraph (1).

(3) Information must not be taken to have been delivered to an official computer system by means of an electronic communication unless it is accepted by the system to which it is delivered.

16. Proof of identity of sender or recipient of information
If it is necessary to prove, for the purpose of any legal proceedings, the identity of—
(a) the sender of any information delivered by means of an electronic communication to an official computer system; or
(b) the recipient of any such information delivered by means of an electronic communication from an official computer system, the sender or recipient, as the case may be, is to be presumed to be the person whose name is recorded as such on that official computer system.

17. Proof of delivery of information
(1) If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any information this must be presumed to have been the case where—
(a) any such information has been delivered to the relevant authority, if the delivery of that information has been recorded on an official computer system; or
(b) any such information has been delivered by the relevant authority, if the delivery of that information has been recorded on an official computer system.

(2) If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any such information, this must be presumed not to be the case, if that information delivered to the relevant authority
has not been recorded on an official computer system.

(3) If it is necessary to prove, for the purpose of any legal proceedings, when any such information sent by means of an electronic communication has been received, the time and date of receipt must be presumed to be that recorded on an official computer system.

18. **Proof of content of information**

If it is necessary to prove, for the purpose of any legal proceedings, the content of any information sent by means of an electronic communication, the content must be presumed to be that recorded on an official computer system.
Schedule 2
Applicable amounts: pensioners
1. Personal allowance

The amount specified in column (2) below in respect of each person or couple specified in column (1) is the amount specified for the purposes of paragraph 25(1)(a).

<table>
<thead>
<tr>
<th>Column (1)</th>
<th>Column (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Person, couple or polygamous marriage</strong></td>
<td><strong>Amount</strong></td>
</tr>
<tr>
<td>(1) Single applicant or lone parent—</td>
<td></td>
</tr>
<tr>
<td>(a) aged under 65;</td>
<td>(a) £145.40;</td>
</tr>
<tr>
<td>(b) aged 65 or over.</td>
<td>(b) £163.50.</td>
</tr>
<tr>
<td>(2) Couple—</td>
<td></td>
</tr>
<tr>
<td>(a) both members aged under 65;</td>
<td>(a) £222.05;</td>
</tr>
<tr>
<td>(b) one or both members aged 65 or over.</td>
<td>(b) £244.95.</td>
</tr>
<tr>
<td>(3) If the applicant is a member of a polygamous marriage and none of the members of the marriage has attained the age of 65—</td>
<td></td>
</tr>
<tr>
<td>(a) for the applicant and the other party to the marriage;</td>
<td>(a) £222.05;</td>
</tr>
<tr>
<td>(b) for each additional spouse who is a member of the same household as the applicant.</td>
<td>(b) £76.65.</td>
</tr>
<tr>
<td>(4) If the applicant is a member of a polygamous marriage and one or more members of the marriage are aged 65 or over—</td>
<td></td>
</tr>
<tr>
<td>(a) for the applicant and the other party to the marriage;</td>
<td>(a) £244.95;</td>
</tr>
<tr>
<td>(b) for each additional spouse who is a member of the same household as the applicant.</td>
<td>(b) £81.45.</td>
</tr>
</tbody>
</table>

2. — Child or young person amounts

(1) The amounts specified in column (2) below in respect of each person specified in column (1) are the amounts, for the relevant period specified in column (1), specified for the purposes of paragraph 25(1)(b).

<table>
<thead>
<tr>
<th>Column (1)</th>
<th>Column (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Child or young Person</strong></td>
<td><strong>Amount</strong></td>
</tr>
<tr>
<td>Person in respect of the period—</td>
<td></td>
</tr>
<tr>
<td>(a) beginning on that person’s date of birth and ending on the day preceding the first Monday in September following that person’s sixteenth birthday;</td>
<td>(a) £65.62;</td>
</tr>
<tr>
<td>(b) beginning on the first Monday in September following that person’s</td>
<td>(b) £65.62</td>
</tr>
<tr>
<td>Column (1)</td>
<td>Column (2)</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Child or young Person</td>
<td>Amount</td>
</tr>
<tr>
<td>sixteenth birthday and ending on the day preceding that person's twentieth birthday.</td>
<td></td>
</tr>
</tbody>
</table>

(2) In column (1) of the table “the first Monday in September” means the Monday which first occurs in the month of September in any year.

3. **Family premium**

The amount for the purposes of paragraph 25(1)(c) in respect of a family of which at least one member is a child or young person is £17.40.

4. **Premiums**

The premiums specified in Part 4 are, for the purposes of paragraph 25(1)(d), applicable to an applicant who satisfies the condition specified in this Part in respect of that premium.

5. (1) Subject to sub-paragraph (2), for the purposes of this Part of this Schedule, once a premium is applicable to an applicant under this Part, a person is to be treated as being in receipt of any benefit for—

(a) in the case of a benefit to which the Social Security (Overlapping Benefits) Regulations 1979 applies, any period during which, apart from the provision of those Regulations, he would be in receipt of that benefit; and

(b) any period spent by a person in undertaking a course of training or instruction provided or approved by the Secretary of State under section 2 of the Employment and Training Act 1973, or by Skills Development Scotland, Scottish Enterprise or Highland and Islands Enterprise under section 2 of the Enterprise and New Towns (Scotland) Act 1990 or for any period during which he is in receipt of a training allowance.

(2) For the purposes of the carer premium under paragraph 9, a person is to be treated as being in receipt of a carer’s allowance by virtue of sub-paragraph (1)(a) only if and for so long as the person in respect of whose care the allowance has been claimed remains in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, or the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012 or an AFIP.

6. **Severe disability premium**

(1) The condition is that the applicant is a severely disabled person.

(2) For the purposes of sub-paragraph (1), an applicant is to be treated as being a severely disabled person if, and only if—

(a) in the case of a single applicant, a lone parent or an applicant who is treated as having no partner in consequence of sub-paragraph (3)—

(i) he is in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, or the daily living component of personal independence payment paid at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012, or an AFIP; and

(ii) subject to sub-paragraph (6), he has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing; and

(iii) no person is entitled to, and in receipt of, a carer’s allowance in respect of caring...
for him;
(b) in the case of an applicant who has a partner—
   (i) the applicant is in receipt of attendance allowance, or the care component of
disability living allowance at the highest or middle rate prescribed in accordance
with section 72(3) of the SSCBA, or the daily living component of personal
independence payment paid at either rate prescribed in accordance with Part 4
of the Welfare Reform Act 2012, or an AFIP;
(ii) his partner is also in receipt of such an allowance or, if he is a member of a
polygamous marriage, each other member of that marriage is in receipt of such
an allowance; and
(iii) subject to sub-paragraph (6), the applicant has no non-dependants aged 18 or
over normally residing with him or with whom he is normally residing,
and either a person is entitled to and in receipt of a carer’s allowance in respect of caring
for only one of the couple or, if he is a member of a polygamous marriage, for one or
more but not all the members of the marriage, or as the case may be, no person is
entitled to and in receipt of such an allowance in respect of caring for either member
of a couple or any of the members of the marriage.

(3) Where an applicant has a partner who does not satisfy the condition in sub-paragraph
(2)(b)(ii), and that partner is blind or is treated as blind within the meaning of sub-
paragraph (4), that partner is to be treated for the purposes of sub-paragraph (2) as if he
were not a partner of the applicant.

(4) For the purposes of sub-paragraph (3), a person is blind if he is registered in a register
compiled by a local authority under section 29 of the National Assistance Act 1948
(welfare services) or, in Scotland, has been certified as blind and in consequence he is
registered in a register maintained by or on behalf of a council constituted under section 2

(5) For the purposes of sub-paragraph (4), a person who has ceased to be registered as blind
on regaining his eyesight is nevertheless to be treated as blind and as satisfying the
additional condition set out in that sub-paragraph for a period of 28 weeks following the
date on which he ceased to be so registered.

(6) For the purposes of sub-paragraph (2)(a)(ii) and (2)(b)(iii) no account is to be taken of—
(a) a person receiving attendance allowance, or the care component of disability living
allowance at the highest or middle rate prescribed in accordance with section 72(3)
of the SSCBA, or the daily living component of personal independence payment paid
at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012,
or an AFIP; or
(b) a person who is blind or is treated as blind within the meaning of sub-paragraphs (4)
and (5).

(7) For the purposes of sub-paragraph (2)(b) a person is to be treated—
(a) as being in receipt of attendance allowance, or the care component of disability
living allowance at the highest or middle rate prescribed in accordance with section
72(3) of the SSCBA, if he would, but for his being a patient for a period exceeding 28
days, be so in receipt;
(b) as being in receipt of the daily living component of personal independence payment
paid at the rate prescribed in accordance with Part 4 of the Welfare Reform Act
2012 if he would, but for his being a patient for a period exceeding 28 days, be so in
receipt, notwithstanding section 86 of that Act and regulations made thereunder;
(c) as being in receipt of an AFIP if he would be so in receipt but for a suspension of
payment in accordance with any terms of the armed and reserve forces
compensation scheme which allow for a suspension because a person is undergoing
medical treatment in a hospital or similar institution;
(d) as being entitled to and in receipt of a carer’s allowance if he would, but for the
person for whom he was caring being a patient in hospital for a period exceeding 28 days, be so entitled and in receipt.

(8) For the purposes of sub-paragraph (2)(a)(iii) and (b) —
(a) no account is to be taken of an award of carer’s allowance to the extent that payment of such an award is back-dated for a period before the date on which the award is first paid; and
(b) references to a person being in receipt of a carer’s allowance include reference to a person who would have been in receipt of that allowance but for the application of a restriction under section 6B or 7 of the Social Security Fraud Act 2001 (loss of benefit).

7. Enhanced disability premium

(1) The condition is that—
(a) the care component of disability living allowance is, or would, but for a suspension of benefit in accordance with regulations under section 113(2) of the SSCBA or but for an abatement as a consequence of hospitalisation, be payable at the highest rate prescribed under section 73(2) of that Act; or
(b) (as the case may be) the daily living component of personal independence payment is, or would, but for a suspension of benefit in accordance with regulations under section 86 of the Welfare Reform Act 2012, be payable at the enhanced rate prescribed in accordance with section 78(2) of that Act, in respect of a child or young person who is a member of the applicant’s family.

(2) Where the condition in sub-paragraph (1) ceases to be satisfied because of the death of a child or young person, the condition is that the applicant or partner is entitled to child benefit in respect of that person under section 145A of the SSCBA (entitlement after death of child or qualifying young person).

8. Disabled child premium
The condition is that a child or young person for whom the applicant or a partner of his is responsible and who is a member of the applicant’s household—
(a) is in receipt of disability living allowance, personal independence payment or is no longer in receipt of such allowance or payment because he is a patient, provided that the child or young person continues to be a member of the family; or
(b) is blind within the meaning of paragraph 6(4) or treated as blind in accordance with paragraph 6(5); or
(c) is a child or young person in respect of whom section 145A of the SSCBA (entitlement after death of child or qualifying young person) applies for the purposes of entitlement to child benefit but only for the period prescribed under that section, and in respect of whom a disabled child premium was included in the applicant’s applicable amount immediately before the death of that child or young person, or ceased to be included in the applicant’s applicable amount because of that child or young person’s death.

9. Carer premium
(1) The condition is that the applicant or his partner is, or both of them are, entitled to a carer’s allowance.
(2) Where a carer premium has been awarded but—
(a) the person in respect of whose care the carer’s allowance has been awarded dies; or
(b) the person in respect of whom the premium was awarded ceases to be entitled, or ceases to be treated as entitled, to a carer’s allowance,
this paragraph is to be treated as satisfied for a period of eight weeks from the relevant date specified in sub-paragraph (3).
(3) The relevant date for the purposes of sub-paragraph (2) is—
   (a) in a case within sub-paragraph (2)(a), the Sunday following the death of the person
       in respect of whose care the carer’s allowance has been awarded (or beginning with
       the date of death if the date occurred on a Sunday);
   (b) in a case within sub-paragraph (2)(b), the date on which that person who was
       entitled to a carer’s allowance ceases to be entitled to it.

(4) For the purposes of this paragraph, a person is to be treated as being entitled to and in
receipt of a carer’s allowance for any period not covered by an award but in respect of
which a payment is made in lieu of an award.

10. Persons in receipt of concessionary payments

For the purpose of determining whether a premium is applicable to a person under paragraphs 6
to 9, any concessionary payment made to compensate that person for the non-payment of any
benefit mentioned in those paragraphs is to be treated as if it were a payment of that benefit.

11. Person in receipt of benefit

For the purposes of this Part of this Schedule, a person is to be regarded as being in receipt of
any benefit if, and only if, it is paid in respect of him and is to be so regarded only for any
period in respect of which that benefit is paid.

12. Amounts of premium specified

(1) Severe Disability Premium—

<table>
<thead>
<tr>
<th>Provision</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) where the applicant satisfies the condition in paragraph 6(2)(a);</td>
<td>(a) £59.50;</td>
</tr>
<tr>
<td>(b) where the applicant satisfies the condition in paragraph 6(2)(b)—</td>
<td>(b) £119.00</td>
</tr>
<tr>
<td>(i) in a case where there is someone in receipt of a carer’s allowance or if he or any partner satisfies that condition only by virtue of paragraph 6(7);</td>
<td>(i) £59.50;</td>
</tr>
<tr>
<td>(ii) in a case where there is no-one in receipt of such an allowance.</td>
<td>(ii) £119.00.</td>
</tr>
</tbody>
</table>

(2) Enhanced disability premium.

<table>
<thead>
<tr>
<th>Provision</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2)</td>
<td>£23.45 in respect of each child or young person in respect of whom the conditions specified in paragraph 7 are satisfied.</td>
</tr>
</tbody>
</table>

(3) Disabled Child Premium.

<table>
<thead>
<tr>
<th>Provision</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3)</td>
<td>£57.89 in respect of each child or young person in respect of whom the condition specified in paragraph 8 is satisfied</td>
</tr>
</tbody>
</table>

(4) Carer Premium.

<table>
<thead>
<tr>
<th>Provision</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4)</td>
<td>£33.30 in respect of each person who satisfies the condition specified in paragraph 9.</td>
</tr>
</tbody>
</table>
Schedule 3
Applicable amounts: persons who are not pensioners (including lone parents with a child under 5 years of age)
**Personal allowances**

1. The amounts specified in column (2) below in respect of each person or couple specified in column (1) are the amounts specified for the purposes of paragraphs 26(1)(a) and 27(1)(a) and (b)—

<table>
<thead>
<tr>
<th>Column (1)</th>
<th>Column (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person or couple</td>
<td>Amount</td>
</tr>
<tr>
<td>(1) A single applicant who—</td>
<td></td>
</tr>
<tr>
<td>(a) is entitled to main phase employment and support allowance;</td>
<td>(a) £71.70;</td>
</tr>
<tr>
<td>(b) is aged not less than 25;</td>
<td>(b) £71.70;</td>
</tr>
<tr>
<td>(c) is aged not less than 18 but less than 25.</td>
<td>(c) £56.80.</td>
</tr>
<tr>
<td>(2) Lone parent.</td>
<td>(2) £71.70.</td>
</tr>
<tr>
<td>(3) Couple.</td>
<td>(3) £112.55.</td>
</tr>
</tbody>
</table>

2. For the purposes of paragraph 1 an applicant is entitled to main phase employment and support allowance if—
   (a) paragraph 18 is satisfied in relation to the applicant; or
   (b) the applicant is entitled to a converted employment and support allowance.

3. —
   (1) The amounts specified in column (2) below in respect of each person specified in column (1) are, for the relevant period specified in column (1), the amounts specified for the purposes of paragraphs 26(1)(b) and 27(1)(c)—

<table>
<thead>
<tr>
<th>Column (1)</th>
<th>Column (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child or Young person</td>
<td>Amount</td>
</tr>
<tr>
<td>Person in respect of the period—</td>
<td></td>
</tr>
<tr>
<td>(a) beginning on that person’s date of birth and ending on the day preceding the first Monday in September following that person’s sixteenth birthday;</td>
<td>£65.62</td>
</tr>
<tr>
<td>(b) beginning on the first Monday in September following that person’s sixteenth birthday and ending on the day preceding that person’s twentieth birthday.</td>
<td>£65.62</td>
</tr>
</tbody>
</table>

(2) In column (1) of the table in sub-paragraph (1), “the first Monday in September” means the Monday which first occurs in the month of September in any year.
Family premium

4.—

(1) The amount for the purposes of paragraphs 26(1)(c) and 27(1)(d) in respect of a family of which at least one member is a child or young person is—

(a) where the applicant is a lone parent to whom sub-paragraph (2) applies, £22.20;

(b) in any other case, £17.40.

(2) The amount in sub-paragraph (1)(a) is applicable to a lone parent—

(a) who was entitled to council tax benefit on 5th April 1998 and whose applicable amount on that date included the amount applicable under paragraph 3(1)(a) of Schedule 1 to the Council Tax Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 as in force on that date; or

(b) on becoming entitled to council tax benefit where that lone parent—

(i) had been treated as entitled to that benefit in accordance with sub-paragraph (3) as at the day before the date of claim for that benefit; and

(ii) was entitled to housing benefit as at the date of claim for council tax benefit or would have been entitled to housing benefit as at that date had that day not fallen during a rent free period as defined in regulation 81 of the Housing Benefit Regulations 2006,

and in respect of whom, all of the conditions specified in sub-paragraph (3) have continued to apply.

(3) The conditions specified for the purposes of sub-paragraph (2) are that, in respect of the period commencing on 6th April 1998—

(a) the applicant has not ceased to be entitled, or has not ceased to be treated as entitled, to

(i) council tax benefit (in relation to the period prior to 1st April 2013), and

(ii) support under this scheme (in relation to the period commencing on 1st April 2013);

(b) the applicant has not ceased to be a lone parent;

(c) where the applicant was entitled to income support or to an income-based jobseeker’s allowance on 5th April 1998, he has continuously, since that date, been entitled to income support, an income-based jobseeker’s allowance or income-related employment and support allowance or a combination of those benefits;

(d) where the applicant was not entitled to income support or to an income-based jobseeker’s allowance on 5th April 1998, he has not become entitled to income support, an income-based jobseeker’s allowance or an income-related employment and support allowance; and

(e) a premium under paragraph 9 or a component under paragraph 21 or 22 has not become applicable to the applicant.

(4) For the purposes of sub-paragraphs (2)(b)(i) and (3)(a), an applicant is to be treated as entitled to council tax benefit during any period where he was not, or had ceased to be, so entitled and—

(a) throughout that period, he had been awarded housing benefit and his applicable amount included the amount applicable under paragraph 3(1)(a) of Schedule 3 to the Housing Benefit Regulations 2006 (lone parent rate of family premium); or

(b) he would have been awarded housing benefit during that period had that period not been a rent free period as defined in regulation 81 of the Housing Benefit Regulations 2006 and his applicable amount throughout that period would have included the amount applicable under paragraph 3(1)(a) of Schedule 3 to those Regulations.
Premiums

5. Except as provided in paragraph 6, the premiums specified in Part 4 are, for the purposes of paragraphs 26(1)(d) and 27(1)(e) (premiums), applicable to an applicant who satisfies the condition specified in paragraphs 9 to 14 in respect of that premium.

6. Subject to paragraph 7, where an applicant satisfies the conditions in respect of more than one premium in this Part of this Schedule, only one premium is applicable to him and, if they are different amounts, the higher or highest amount applies.

7. The following premiums, namely—
   (a) a severe disability premium to which paragraph 11 applies;
   (b) an enhanced disability premium to which paragraph 12 applies;
   (c) a disabled child premium to which paragraph 13 applies; and
   (d) a carer premium to which paragraph 14 applies,
   may be applicable in addition to any other premium which may apply under this Schedule.

8. (1) Subject to sub-paragraph (2), for the purposes of this Part of this Schedule, once a premium is applicable to an applicant under this Part, a person is to be treated as being in receipt of any benefit for—
   (a) in the case of a benefit to which the Social Security (Overlapping Benefits) Regulations 1979 applies, any period during which, apart from the provisions of those Regulations, he would be in receipt of that benefit; and
   (b) any period spent by a person in undertaking a course of training or instruction provided or approved by the Secretary of State under section 2 of the Employment and Training Act 1973 or by Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise under section 2 of the Enterprise and New Towns (Scotland) Act 1990 for any period during which he is in receipt of a training allowance.

   (2) For the purposes of the carer premium under paragraph 14, a person is to be treated as being in receipt of carer's allowance by virtue of sub-paragraph (1)(a) only if and for so long as the person in respect of whose care the allowance has been claimed remains in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable under Part 4 of the Welfare Reform Act 2012.

9. Disability premium
   The condition is that—
   (a) where the applicant is a single applicant or a lone parent, he has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10 is satisfied; or
   (b) where the applicant has a partner, either—
      (i) the applicant has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10(1)(a) or (b) is satisfied by him; or
      (ii) his partner has not attained the qualifying age for state pension credit and the additional condition specified in paragraph 10(1)(a) is satisfied by his partner.

10. Additional condition for the disability premium
   (1) Subject to sub-paragraph (2) and paragraph 8, the additional condition referred to in paragraph 9 is that either—
   (a) the applicant or, as the case may be, his partner—
      (i) is in receipt of one or more of the following benefits: attendance allowance, disability living allowance, personal independence payment, an AFIP, the disability element or the severe disability element of working tax credit as specified in regulation 20(1)(b) and (f) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002,
mobility supplement, long-term incapacity benefit under Part 2 of the SSCBA or severe disablement allowance under Part 3 of that Act but, in the case of long-term incapacity benefit or severe disablement allowance, only where it is paid in respect of him; or

(ii) was in receipt of long-term incapacity benefit under Part 2 of the SSCBA when entitlement to that benefit ceased on account of the payment of a retirement pension under that Act and the applicant remained continuously entitled to—

(aa) council tax benefit (in relation to the period prior to 1st April 2013, and

(bb) support under this scheme (in relation to the period commencing on 1st April 2013), and

if the long-term incapacity benefit was payable to his partner, the partner is still a member of the family; or

(iii) was in receipt of attendance allowance or disability living allowance but payment of benefit has been suspended in accordance with regulations made under section 113(2) of the SSCBA or otherwise abated as a consequence of the applicant or his partner becoming a patient within the meaning of paragraph 58(11)(i) (treatment of child care charges); or

(iv) was in receipt of personal independence payment, but payment of that benefit has been suspended in accordance with section 86 of the Welfare Reform Act 2012 as a consequence of the applicant becoming a patient within the meaning of paragraph 58(11)(i) (treatment of child care charges); or

(v) was in receipt of an AFIP, but payment has been suspended in accordance with any terms of the armed and reserve forces compensation scheme which allow for suspension because a person is undergoing medical treatment in a hospital or similar institution; or

(vi) he has an invalid carriage or other vehicle provided to him by the Secretary of State or a clinical commissioning group under paragraph 9 of Schedule 1 to the National Health Service Act 2006 or under section 46 of the National Health Service (Scotland) Act 1978 or provided by the Department of Health, Social Services and Public Safety in Northern Ireland under Article 30(1) of the Health and Personal Social Services (Northern Ireland) Order 1972; or

(vii) is blind and in consequence registered in a register compiled by a local authority under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence he is registered in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

(b) the applicant—

(i) is, or is treated as, incapable of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work); and

(ii) has been incapable, or has been treated as incapable, of work for a continuous period of not less than—

(aa) in the case of an applicant who is terminally ill within the meaning of section 30B(4) of the SSCBA, 196 days;

(bb) in any other case, 364 days.

(2) For the purposes of sub-paragraph (1)(a)(vii), a person who has ceased to be registered as
blind on regaining his eyesight is nevertheless to be treated as blind and as satisfying the additional condition set out in that sub-paragraph for a period of 28 weeks following the date on which he ceased to be so registered.

(3) For the purposes of sub-paragraph (1)(b), once the disability premium is applicable to an applicant by virtue of his satisfying the additional condition specified in that provision, if he then ceases, for a period of 8 weeks or less, to be treated as incapable of work or to be incapable of work he is, on again becoming so incapable of work, immediately thereafter to be treated as satisfying the condition in sub-paragraph (1)(b).

(4) For the purposes of sub-paragraph (1)(b), once the disability premium is applicable to an applicant by virtue of his satisfying the additional condition specified in that provision, he is to continue to be treated as satisfying that condition for any period spent by him in undertaking a course of training provided under section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990 or for any period during which he is in receipt of a training allowance.

(5) For the purposes of sub-paragraph (1)(b), where any two or more periods of incapacity are separated by a break of not more than 56 days, those periods are to be treated as one continuous period.

(6) For the purposes of this paragraph, a reference to a person who is or was in receipt of long-term incapacity benefit includes a person who is or was in receipt of short-term incapacity benefit at a rate equal to the long-term rate by virtue of section 30B(4)(a) of the Act (short-term incapacity benefit for a person who is terminally ill), or who would be or would have been in receipt of short-term incapacity benefit at such a rate but for the fact that the rate of short-term incapacity benefit already payable to him is or was equal to or greater than the long-term rate.

(7) In the case of an applicant who is a welfare to work beneficiary (a person to whom regulation 13A(1) of the Social Security (Incapacity for Work) (General) Regulations 1995 applies, and who again becomes incapable of work for the purposes of Part 12A of the SSCBA)—

(a) the reference to a period of 8 weeks in sub-paragraph (3); and

(b) the reference to a period of 56 days in sub-paragraph (5),

in each case is to be treated as a reference to a period of 104 weeks.

(8) The applicant is not entitled to the disability premium if he has, or is treated as having, limited capability for work.

11. Severe disability premium

(1) The condition is that the applicant is a severely disabled person.

(2) For the purposes of sub-paragraph (1), an applicant is to be treated as being a severely disabled person if, and only if—

(a) in the case of a single applicant, a lone parent or an applicant who is treated as having no partner in consequence of sub-paragraph (3)—

(i) he is in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012, or an AFIP; and

(ii) subject to sub-paragraph (4), he has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing; and
(iii) no person is entitled to, and in receipt of, a carer’s allowance under section 70 of the SSCBA in respect of caring for him;

(b) in the case of an applicant who has a partner—
(i) the applicant is in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012, or an AFIP; and

(ii) his partner is also in receipt of such an allowance or, if he is a member of a polygamous marriage, all the partners of that marriage are in receipt of such an allowance; and

(iii) subject to sub-paragraph (4), the applicant has no non-dependants aged 18 or over normally residing with him or with whom he is normally residing,

and either a person is entitled to and in receipt of a carer’s allowance in respect of caring for only one of a couple or, in the case of a polygamous marriage, for one or more but not all the partners of the marriage, or as the case may be, no person is entitled to and in receipt of such an allowance in respect of caring for either member of a couple or any partner of a polygamous marriage.

(3) Where an applicant has a partner who does not satisfy the condition in sub-paragraph (2)(b)(ii), and that partner is blind or is treated as blind within the meaning of paragraph 10(1)(a)(v) and (2), that partner is to be treated for the purposes of sub-paragraph (2)(b)(iii) as if he were not a partner of the applicant.

(4) For the purposes of sub-paragraph (2)(a)(ii) and (2)(b)(iii) no account is to be taken of—
(a) a person receiving attendance allowance, or disability living allowance by virtue of the care component at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, or the daily living component of personal independence payment payable at either rate prescribed in accordance with Part 4 of the Welfare Reform Act 2012; or

(b) a person who is blind or is treated as blind within the meaning of paragraph 10(1)(a)(v) and (2).

(5) For the purposes of sub-paragraph (2)(b) a person is to be treated—
(a) as being in receipt of attendance allowance, or the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the SSCBA, or the daily living component of personal independence payment payable at either rate under Part 4 of the Welfare Reform Act 2012, or an AFIP if he would, but for his being a patient for a period exceeding 28 days, be so in receipt;

(b) as being entitled to and in receipt of a carer’s allowance if he would, but for the person for whom he was caring being a patient in hospital for a period exceeding 28 days, be so entitled and in receipt.

(6) For the purposes of sub-paragraph (2)(a)(iii) and (2)(b), no account is to be taken of an award of carer’s allowance to the extent that payment of such an award is back-dated for a period before the date on which the award is first paid.

(7) In sub-paragraph (2)(a)(iii) and (b), references to a person being in receipt of a carer’s allowance include references to a person who would have been in receipt of that allowance but for the application of a restriction under section 6B or 7 of the Social Security Fraud Act 2001 (loss of benefit provisions).
12. Enhanced disability premium
   (1) Subject to sub-paragraph (2), the condition is that—
   (a) the Secretary of State has decided that the applicant has, or is to be treated as having, a limited capability for work-related activity; or
   (b) the care component of disability living allowance is, or would be payable at the highest rate prescribed under section 72(3) of the SSCBA, but for a suspension of benefit in accordance with regulations made under section 113(2) of the SSCBA or but for an abatement as a consequence of hospitalisation be payable at the highest rate prescribed under section 72(3) of the SSCBA in respect of—
      (i) the applicant; or
      (ii) a member of the applicant's family, who has not attained the qualifying age for state pension credit; or
   (c) the daily living component of personal independence payment is, or would be payable at either rate under Part 4 of the Welfare Reform Act 2012, but for a suspension of benefit in accordance with section 86 of the Welfare Reform Act 2012 in respect of—
      (i) the applicant; or
      (ii) a member of the applicant's family, who has not attained the qualifying age for state pension credit.

   (2) Where the condition in sub-paragraph (1) ceases to be satisfied because of the death of a child or young person, the condition is that the applicant or partner is entitled to child benefit in respect of that person under section 145A of the SSCBA (entitlement after death of child or qualifying young person).

   (3) The condition is not satisfied if the person to whom sub-paragraph (1) refers is—
   (a) an applicant who—
      (i) is not a member of a couple or a polygamous marriage; and
      (ii) is a patient within the meaning of paragraph 58(11)(i) (treatment of child care charges) and has been for a period of more than 52 weeks; or
   (b) a member of a couple or a polygamous marriage where each member is a patient within the meaning of paragraph 58(11)(i) and has been for a period of more than 52 weeks.

13. Disabled child premium
   The condition is that a child or young person for whom the applicant or a partner of his is responsible and who is a member of the applicant’s household—
   (a) is in receipt of disability living allowance or personal independence payment or is no longer in receipt of such allowance because he is a patient, provided that the child or young person continues to be a member of the family; or
   (b) is blind or treated as blind within the meaning of paragraph 10; or
   (c) is a child or young person in respect of whom section 145A of the SSCBA (entitlement after death of child or qualifying young person) applies for the purposes of entitlement to child benefit but only for the period prescribed under that section, and in respect of whom a disabled child premium was included in the applicant’s applicable amount immediately before the death of that child or young person, or ceased to be included in the applicant’s applicable amount because of that child or young person’s death.

14. Carer premium
   (1) The condition is that the applicant or his partner is, or both of them are, entitled to a carer’s allowance under section 70 of the SSCBA.

   (2) Where a carer premium is awarded but—
   (a) the person in respect of whose care the carer’s allowance has been awarded dies; or
   (b) in any other case the person in respect of whom a carer premium has been awarded ceases to be entitled to a carer’s allowance,
the condition for the award of the premium is to be treated as satisfied for a period of eight weeks from the relevant date specified in sub-paragraph (3).

(3) The relevant date for the purposes of sub-paragraph (2) is—
(a) where sub-paragraph (2)(a) applies, the Sunday following the death of the person in respect of whose care a carer’s allowance has been awarded or the date of death if the death occurred on a Sunday;
(b) in any other case, the date on which the person who has been entitled to a carer’s allowance ceases to be entitled to that allowance.

(4) Where a person who has been entitled to a carer’s allowance ceases to be entitled to that allowance and makes an application for support, the condition for the award of the carer premium is to be treated as satisfied for a period of eight weeks from the date on which—
(a) the person in respect of whose care the carer’s allowance has been awarded dies; or
(b) in any other case, the person who has been entitled to a carer’s allowance ceased to be entitled to that allowance.

15. Persons in receipt of concessionary payments
For the purpose of determining whether a premium is applicable to a person under paragraphs 10 to 14, any concessionary payment made to compensate that person for the non-payment of any benefit mentioned in those paragraphs is to be treated as if it were a payment of that benefit.

16. Persons in receipt of benefit for another
For the purposes of this Part of this Schedule, a person is to be regarded as being in receipt of any benefit if, and only if, it is paid in respect of him and is to be so regarded only for any period in respect of which that benefit is paid.

17. Amounts of Premiums Specified

(1) Disability Premium—

<table>
<thead>
<tr>
<th>Premium</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) where the applicant satisfies the condition in paragraph 9(a);</td>
<td>(a) £31.00;</td>
</tr>
<tr>
<td>(b) where the applicant satisfies the condition in paragraph 9(b).</td>
<td>(b) £44.20.</td>
</tr>
</tbody>
</table>

(2) Severe Disability Premium—

<table>
<thead>
<tr>
<th>Premium</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) where the applicant satisfies the condition in paragraph 11(2)(a);</td>
<td>(a) £59.50;</td>
</tr>
<tr>
<td>(b) where the applicant satisfies the condition in paragraph 11(2)(b)—</td>
<td></td>
</tr>
<tr>
<td>(i) in a case where there is someone in receipt of a carer's allowance or if he or any partner satisfies that condition only by virtue of paragraph 11(5);</td>
<td>(b)(i) £59.50;</td>
</tr>
</tbody>
</table>
### 18. The components

Subject to paragraph 20 the applicant is entitled to one, but not both, of the components in paragraph 21 or 22 if—

(a) the applicant or the applicant’s partner has made a claim for employment and support allowance;

(b) the Secretary of State has decided that the applicant or the applicant’s partner has, or is to be treated as having, limited capability for work or limited capability for work-related activity; and

(c) either—

(i) the assessment phase as defined in section 24(2) of the Welfare Reform Act has ended; or

(ii) regulation 7 of the Employment and Support Allowance Regulations 2008 (circumstances where the condition that the assessment phase has ended before entitlement to the support component or the work related activity component arises does not apply) applies.

### 19.

Subject to paragraph 20, the applicant is entitled to one, but not both, of the components in

<table>
<thead>
<tr>
<th>Premium</th>
<th>Amount</th>
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<tbody>
<tr>
<td>(i) in a case where there is no-one in receipt of such an allowance.</td>
<td>(b)(ii) £119.00.</td>
</tr>
<tr>
<td>(3) Disabled Child Premium.</td>
<td>(3) £57.89 in respect of each child or young person in respect of whom the condition specified in paragraph 13 is satisfied.</td>
</tr>
<tr>
<td>(4) Carer Premium.</td>
<td>(4) £33.30 in respect of each person who satisfies the condition specified in paragraph 14.</td>
</tr>
<tr>
<td>(5) Enhanced disability premium</td>
<td>(a) £23.45 in respect of each child or young person in respect of whom the conditions specified in paragraph 12 are satisfied;</td>
</tr>
<tr>
<td></td>
<td>(b) £15.15 in respect of each person who is neither—</td>
</tr>
<tr>
<td></td>
<td>(i) a child or young person; nor</td>
</tr>
<tr>
<td></td>
<td>(ii) a member of a couple or a polygamous marriage,</td>
</tr>
<tr>
<td></td>
<td>in respect of whom the conditions specified in paragraph 12 are satisfied;</td>
</tr>
<tr>
<td></td>
<td>(c) £21.75 where the applicant is a member of a couple or a polygamous marriage and the conditions specified in paragraph 12 are satisfied in respect of a member of that couple or polygamous marriage.</td>
</tr>
</tbody>
</table>
paragraphs 21 and 22 if the applicant or his partner is entitled to a converted employment and support allowance.

20.  
(1) The applicant has no entitlement under paragraph 21 or 22 if the applicant is entitled to the disability premium under paragraphs 9 and 10.  
(2) Where the applicant and the applicant’s partner each satisfies paragraph 21 or 22, the component to be included in the applicant’s applicable amount is that which relates to the applicant.

21. The work-related activity component  
The applicant is entitled to the work-related activity component if the Secretary of State has decided that the applicant or the applicant’s partner has, or is to be treated as having, limited capability for work.

22. The support component  
The applicant is entitled to the support component if the Secretary of State has decided that the applicant or the applicant’s partner has, or is to be treated as having, limited capability for work-related activity.

23. Amount of Components  
The amount of the work-related activity component is £28.45.

24.  
The amount of the support component is £34.80.

25. Transitional Addition  
(1) The applicant is entitled to the transitional addition calculated in accordance with paragraph 28 where the applicant or the applicant’s partner (“the relevant person”)—  
(a) is entitled to a converted employment and support allowance; or  
(b) is appealing a conversion decision as described in regulation 5(2)(b) of the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2008 and—  
(i) is treated as having limited capability for work by virtue of regulation 30 of the Employment and Support Allowance Regulations 2008 as modified by the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2008; and  
(ii) is not in receipt of an income-related employment and support allowance, unless the amount of the transitional addition calculated in accordance with paragraph 28 would be nil.

(2) The applicant’s entitlement to a transitional addition by virtue of this paragraph ends on any of the following—  
(a) the reduction of the transitional addition to nil in accordance with paragraph 29;  
(b) the termination of the applicant’s award of support under this scheme;  
(c) the relevant person ceasing to meet the requirements of sub-paragraph (1)(a) or (b), as the case may be;  
(d) the applicant or the applicant’s partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker’s allowance or income support;  
(e) 5th April 2020.

26.  
(1) This paragraph applies where—  
(a) the applicant’s entitlement to a transitional addition ends, by virtue of the termination of the applicant’s award of support, under—  
(i) paragraph 25(2)(b);  
(ii) sub-paragraph (3)(b); or
(iii) paragraph 27(3)(b);
(b) within 12 weeks of that termination but before 5th April 2020 the applicant again becomes entitled to support under this scheme;
(c) in the support week in which the applicant again becomes entitled to support under this scheme the relevant person is entitled to an employment and support allowance which is not income-related; and

(d) at the date on which the applicant again becomes entitled to support under this scheme, neither the applicant nor the applicant’s partner is entitled to an income-related employment and support allowance, an income-based jobseeker’s allowance or income support.

(2) Where this paragraph applies, the applicant is entitled, with effect from the day on which the applicant again becomes entitled to support under this scheme, to a transitional addition of the amount of the transitional addition that would have applied had the applicant’s entitlement to a transitional addition not ended (but taking account of the effect which any intervening change of circumstances would have had by virtue of paragraph 29), unless the amount of the transitional addition would be nil.

(3) The applicant’s entitlement to a transitional addition by virtue of this paragraph ends on any of the following—
(a) the reduction of the transitional addition to nil in accordance with paragraph 29;
(b) the termination of the applicant’s award of support under this scheme;
(c) the relevant person no longer being entitled to the employment and support allowance referred to in sub-paragraph (1)(c);
(d) the applicant or the applicant’s partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker’s allowance or income support;
(e) 5th April 2020.

27.
(1) This paragraph applies where—
(a) the applicant’s entitlement to a transitional addition ends, by virtue of the relevant person ceasing to be entitled to an employment and support allowance, under—
(i) paragraph 25(2)(c);
(ii) paragraph 26(3)(c); or
(iii) sub-paragraph (3)(c);
(b) before 5th April 2020 the relevant person again becomes entitled to an employment and support allowance which is not income-related;
(c) at the date on which the relevant person again becomes entitled to an employment support allowance which is not income-related regulation 145(1) of the Employment and Support Allowance Regulations 2008 applies to the relevant person; and
(d) at the date on which the relevant person again becomes entitled to an employment support allowance which is not income-related, neither the applicant nor the applicant’s partner is entitled to an income-related employment and support allowance, an income-based jobseeker’s allowance or income support.

(2) Where this paragraph applies, the applicant is entitled, with effect from the day that the relevant person’s entitlement to employment and support allowance takes effect for the purposes of support under this scheme, to a transitional addition of the amount of the transitional addition that would have applied had the applicant’s entitlement to a transitional addition not ended (but taking account of the effect which any intervening change of circumstances would have had by virtue of paragraph 29), unless the amount of the transitional addition would be nil.

(3) The applicant’s entitlement to a transitional addition by virtue of this paragraph ends on
any of the following—
(a) the reduction of the transitional addition to nil in accordance with paragraph 29;
(b) the termination of the applicant’s award of support under this scheme;
(c) the relevant person no longer being entitled to the employment and support allowance referred to in sub-paragraph (1)(b);
(d) the applicant or the applicant’s partner becoming entitled to an income-related employment and support allowance, an income-based jobseeker’s allowance or income support;
(e) 5th April 2020.

28. Amount of Transitional Addition

(1) Subject to paragraph 29, the amount of the transitional addition is the amount by which Amount A exceeds Amount B.

(2) Where a conversion decision as described in regulation 5(2)(a) of the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) (No. 2) Regulations 2010 (“the 2010 Regulations”) is made in respect of the relevant person—
(a) Amount A is the basic amount that would have applied on the day that decision took effect had that decision not been made; and
(b) Amount B is the basic amount that applied on that day as a result of that decision.

(3) Where the relevant person is appealing a conversion decision as described in regulation 5(2)(b) of the 2010 Regulations and is treated as having limited capability for work by virtue of regulation 30 of the Employment and Support Allowance Regulations 2008 as modified by the 2010 Regulations—
(a) Amount A is the basic amount that would have applied on the day the relevant person was first treated as having limited capability for work if the relevant person had not been so treated; and
(b) Amount B is the basic amount that applied on that day as a result of the relevant person being so treated.

(4) In this paragraph and paragraph 29, “basic amount” means the aggregate of such amounts as may apply in the applicant’s case in accordance with paragraph 26(1)(a) to (e) or paragraph 27(1)(a) to (f) (applicable amounts).

29.

(1) Subject to sub-paragraph (2), where there is a change of circumstances which leads to an increase in the applicant’s basic amount, the transitional addition that applies immediately before the change of circumstances must be reduced by the amount by which Amount C exceeds Amount D.

(2) If Amount C exceeds Amount D by more than the amount of the transitional addition that applies immediately before the change of circumstances, that transitional addition must be reduced to nil.

(3) Amount C is the basic amount that applies as a result of the increase.

(4) Amount D is the basic amount that applied immediately before the increase.
Schedule 4
Amount of Alternative Maximum Council Tax Support: pensioners and lone parents with a child under 5 years of age
(1) Subject to paragraphs 2 and 3, the Alternative Maximum Council Tax Support in respect of a day for the purpose of paragraph 31 (Alternative Maximum Council Tax Support: pensioners or lone parents with a child under 5 years of age) is determined in accordance with the following Table and in this Table—
(a) “second adult” means any person or persons residing with the applicant to whom paragraph 15(2) (class C) (as the case may be) applies; and
(b) “persons to whom paragraph 75(1) of this scheme applies” includes any person to whom that paragraph would apply were they, and their partner if they had one, below the qualifying age for state pension credit.

(2) In this Schedule “council tax due in respect of that day” means the council tax payable under section 10 of the 1992 Act less:
(a) any reductions made in consequence of any enactment in, or under, the 1992 Act (other than support under this scheme); and
(b) in a case to which sub-paragraph (c) in column (1) of the table below applies, the amount of any discount which may be appropriate to the dwelling under the 1992 Act.

<table>
<thead>
<tr>
<th>(1)</th>
<th>(2)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Second adult</strong></td>
<td><strong>Alternative Maximum Council Tax Support</strong></td>
</tr>
<tr>
<td>(a) Where the second adult or all second adults are in receipt of income support, an income-related employment and support allowance or state pension credit or are persons on an income-based jobseeker’s allowance;</td>
<td>(a) 25 per cent of the council tax due in respect of that day;</td>
</tr>
<tr>
<td>(b) where the gross income of the second adult or, where there is more than one second adult, their aggregate gross income disregarding any income of persons on income support, an income-related employment and support allowance, state pension credit or an income-based jobseeker’s allowance—</td>
<td>(b)</td>
</tr>
<tr>
<td>(i) is less than £183.00 per week;</td>
<td>(i) 15 per cent of the council tax due in respect of that day;</td>
</tr>
<tr>
<td>(ii) is not less than £183.00 per week but less than £239.00 per week;</td>
<td>(ii) 7.5 per cent of the council tax due in respect of that day;</td>
</tr>
<tr>
<td>(c) where the dwelling would be wholly occupied by one or more persons to whom paragraph 75(1) of this scheme applies but for the presence of one or more second adults who are in receipt of income support, state pension credit, an income-related employment and support allowance or are persons on an income-based jobseeker’s allowance.</td>
<td>(c) 100 per cent of the council tax due in respect of that day.</td>
</tr>
</tbody>
</table>
3. In determining a second adult’s gross income for the purposes of this Schedule, the following must be disregarded from that income—

(a) any attendance allowance, any disability living allowance, any personal independence payment under Part 4 of the Welfare Reform Act 2012 or an AFIP;

(b) any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006) which, had his income fallen to be calculated under paragraph 54 (calculation of income other than earnings: persons who are not pensioners), would have been disregarded under paragraph 28 of Schedule 8 (income in kind); and

(c) any payment which, had his income fallen to be calculated under paragraph 54, would have been disregarded under paragraph 41 of Schedule 8 (payments made under certain trusts and certain other payments).

4. Where there are two or more second adults residing with the applicant for support under this scheme and any such second adult falls to be disregarded for the purposes of discount in accordance with Schedule 1 to the 1992 Act, his income must be disregarded in determining the amount of any Alternative Maximum Council Tax Support, unless that second adult is a member of a couple and his partner does not fall to be disregarded for the purposes of discount.
Schedule 5
Sums disregarded from applicant’s earnings: pensioners
1. Where two or more of paragraphs 2 to 5 apply in any particular case the overall maximum sum which falls to be disregarded in that case under those paragraphs is restricted to—
   (a) £25 in the case of a lone parent;
   (b) £20 in any other case.

2. In a case where an applicant is a lone parent, £25 of earnings.

3. (1) In a case of earnings from any employment or employments to which sub-paragraph (2) applies, £20.

   (2) This paragraph applies to employment—
       (a) as a part-time fire-fighter employed by a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004 or a scheme to which section 4 of that Act applies;
       (b) a part-time fire-fighter employed by a fire and rescue authority (as defined in section 1 of the Fire (Scotland) Act 2005) or a joint fire and rescue board constituted by an amalgamation scheme made under section 2(1) of that Act;
       (c) as an auxiliary coastguard in respect of coast rescue activities;
       (d) in the manning or launching of a lifeboat if the employment is part-time;
       (e) as a member of any territorial or reserve force prescribed in Part I of Schedule 6 to the Social Security (Contributions) Regulations 2001.

   (3) If
       (a) any of the earnings of the applicant or, if he has a partner, his partner, or both of them, are disregarded under sub-paragraph (1); and
       (b) either of them has, or both of them have, other earnings, so much of those other earnings as would not, in the aggregate with the earnings disregarded under that sub-paragraph, exceed £20.

4. (1) If the applicant or, if he has a partner, his partner is a carer, or both are carers, £20 of any earnings received from his or their employment.

   (2) Where the carer premium is awarded in respect of the applicant and of any partner of his, their earnings must for the purposes of this paragraph be aggregated, but the amount to be disregarded in accordance with sub-paragraph (1) must not exceed £20 of the aggregated amount.

   (3) In this paragraph the applicant or his partner is a carer if paragraph 14 of Part 3 of Schedule 3 (amount applicable for carers) is satisfied in respect of him.

5. (1) £20 is disregarded if the applicant or, if he has a partner, his partner—
   (a) is in receipt of—
       (i) long-term incapacity benefit under section 30A of the SSCBA;
       (ii) severe disablement allowance under section 68 of that Act;
       (iii) attendance allowance under sections 64 of that Act;
       (iv) disability living allowance;
       (v) personal independence payment;
       (vi) an AFIP;
       (vii) any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a
supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983;

(viii) the disability element or the severe disability element of working tax credit under Schedule 2 to the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002; or

(ix) main phase employment and support allowance; or

(b) is or are registered as blind in a register compiled by a local authority under section 29 of the National Assistance Act 1948 (welfare services) or, in Scotland, has been certified as blind and in consequence is registered in a register maintained by or on behalf of a council constituted under section 2 of the Local Government (Scotland) Act 1994; or

(c) is, or is treated as, incapable of work in accordance with the provisions of, and regulations made under, Part 12A of the SSCBA (incapacity for work), and has been incapable, or has been treated as incapable, of work for a continuous period of not less than—

(i) in the case of an applicant who is terminally ill within the meaning of section 30B(4) of the Act, 196 days;

(ii) in any other case, 364 days; or

(d) has, or is treated as having, limited capacity for work within the meaning of section 1(4) of the Welfare Reform Act 1997 or limited capability for work-related activity within the meaning of section 2(5) of that Act and either—

(i) the assessment phase as defined in section 24(2) of the Welfare Reform Act has ended; or

(ii) regulation 7 of the Employment and Support Allowance Regulations 2008 (circumstances where the condition that the assessment phase has ended before entitlement to the support component or the work-related activity component arising does not apply) applies.

(2) Subject to sub-paragraph (3), £20 is disregarded if the applicant or, if he has a partner, his partner has, within a period of 8 weeks ending on the day in respect of which the applicant or his partner attains the qualifying age for state pension credit, had an award of housing benefit or council tax benefit or been in receipt of support under this scheme and—

(a) £20 was disregarded in respect of earnings taken into account in that award; and

(b) the person whose earnings qualified for the disregard continues in employment after the termination of that award.

(3) The disregard of £20 specified in sub-paragraph (2) applies so long as there is no break, other than a break which does not exceed 8 weeks, in a person’s—

(a) entitlement to housing benefit; or

(b) receipt of support under a council tax support scheme; or

(c) employment,

following the first day in respect of which that benefit is awarded under this scheme.

(4) £20 is the maximum amount which may be disregarded under this paragraph, notwithstanding that, where the applicant has a partner, both the applicant and his partner satisfy the requirements of this paragraph.

6.—

(1) Where—

(a) the applicant (or if the applicant is a member of a couple, at least one member of that couple) is a person to whom sub-paragraph (5) applies;

(b) the Secretary of State is satisfied that that person is undertaking exempt work as defined in sub-paragraph (6); and

(c) paragraph 35 (applicant in receipt of guarantee credit: pensioners) does not apply, the amount specified in sub-paragraph (7) (“the specified amount”).
(2) Where this paragraph applies, paragraphs 1 to 5 and 8 do not apply; but in any case where the applicant is a lone parent, and the specified amount would be less than the amount specified in paragraph 2, then paragraph 2 applies instead of this paragraph.

(3) Notwithstanding paragraph 33 (calculation of income and capital of members applicant’s family and of a polygamous marriage), if sub-paragraph (1) applies to one member of a couple (“A”) it does not apply to the other member of that couple (“B”) except to the extent provided in sub-paragraph (4).

(4) Where A’s earnings are less than the specified amount, there is also to be disregarded so much of B’s earnings as would not when aggregated with A’s earnings exceed the specified amount; but the amount of B’s earnings which may be disregarded under this sub-paragraph is limited to a maximum of £20 unless the Secretary of State is satisfied that B is also undertaking exempt work.

(5) This sub-paragraph applies to a person who is—
(a) in receipt of a contributory employment and support allowance;
(b) in receipt of incapacity benefit;
(c) in receipt of severe disablement allowance;
(d) being credited with earnings on the grounds of incapacity for work or limited capability for work under regulation 8B of the Social Security (Credits) Regulations 1975.

(6) “Exempt work” means work of the kind described in;
(a) regulation 45(2), (3) or (4) of the Employment and Support Allowance Regulations 2008; or (as the case may be); or
(b) regulation 17(2), (3) or (4) of the Social Security (Incapacity for Work) (General) Regulations 1995,
and, in determining for the purposes of this paragraph whether an applicant or a member of a couple is undertaking any type of exempt work, it is immaterial whether that person or their partner is also undertaking other work.

(7) The specified amount is the amount of money from time to time mentioned in any provision referred to in sub-paragraph (6) by virtue of which the work referred to in sub-paragraph (1) is exempt (or, where more than one such provision is relevant and those provisions mention different amounts of money, the highest of those amounts).

7. Any amount or the balance of any amount which would fall to be disregarded under paragraph 18 or 19 of Schedule 6 had the applicant’s income which does not consist of earnings been sufficient to entitle him to the full amount disregarded thereunder.

8. Except where the applicant or his partner qualifies for a £20 disregard under the preceding provisions of this Schedule—
(a) £5 is to be disregarded if an applicant who has no partner has earnings;
(b) £10 is to be disregarded if an applicant who has a partner has earnings.

9. Any earnings, other than earnings referred to in paragraph 40(9)(b), derived from employment which ended before the day in respect of which the applicant first satisfies the conditions for entitlement to support under this scheme.

10.—
(1) In a case where the applicant is a person who satisfies at least one of the conditions set out in sub-paragraph (2), and his net earnings equal or exceed the total of the amounts set out in sub-paragraph (3), the amount of his earnings that falls to be disregarded under this Schedule is to be increased by £17.10.
(2) The conditions of this sub-paragraph are that—
(a) the applicant, or if he has a partner, either the applicant or his partner, is a person to whom regulation 20(1)(c) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 applies; or

(b) the applicant—
(i) is, or any partner of his is, aged at least 25 and is engaged in remunerative work for on average not less than 30 hours per week; or

(ii) if he is a member of a couple—
(aa) at least one member of that couple is engaged in remunerative work for on average not less than 16 hours per week; and

(bb) his applicable amount includes a family premium under paragraph 3 of Schedule 2; or

(iii) is a lone parent who is engaged in remunerative work for on average not less than 16 hours per week; or

(iv) is, or if he has a partner, one of them is, engaged in remunerative work for on average not less than 16 hours per week and paragraph 5(1) above is satisfied in respect of that person.

(3) The following are the amounts referred to in sub-paragraph (1)—
(a) any amount disregarded under this Schedule;
(b) the amount of child care charges calculated as deductible under paragraph 57(1)(c) (deductions from income of certain child care charges); and
(c) £17.10.

(4) The provisions of paragraph 10 (remunerative work) apply in determining whether or not a person works for on average not less than 30 hours per week, but as if the reference to 16 hours in sub-paragraph (1) of that paragraph was a reference to 30 hours.

11.
Where a payment of earnings is made in a currency other than Sterling, any banking charge or commission payable in converting to that payment into Sterling.
Schedule 6
Amounts to be disregarded in the calculation of income other than earnings: pensioners
1. In addition to any sum which falls to be disregarded in accordance with paragraphs 2 to 6, any of the following—
   (a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 2 or 3);
   (b) a war widow's pension or war widower's pension;
   (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
   (d) a guaranteed income payment and, if the amount of that payment has been abated to less than £10 by a pension or payment falling within article 39(1)(a) or (b) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011, so much of that pension or payment as would not, in aggregate with the amount of any guaranteed income payment disregarded, exceed £10;
   (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
   (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
   (g) a pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

2. The whole of any amount included in a pension to which paragraph 1 relates in respect of—
   (a) the applicant's need for constant attendance;
   (b) the applicant's exceptionally severe disablement.

3. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983 or any payment intended to compensate for the non-payment of such a supplement.

4. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.

5. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983 (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

6.—
   (1) Any payment which is—
      (a) made under any of the Dispensing Instruments to a widow, widower or surviving civil partner of a person—
         (i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and
         (ii) whose service in such capacity terminated before 31st March 1973; and
      (b) equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

   (2) In this paragraph “the Dispensing Instruments” means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of
14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

7. £15 of any widowed parent’s allowance to which the applicant is entitled under section 39A of the SSCBA.

8. £15 of any widowed mother’s allowance to which the applicant is entitled under section 37 of the SSCBA.

9. Where the applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for whom such accommodation is provided for the whole or any part of a week, equal to—
   (a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20, 100 per cent. of such payments; or
   (b) where the aggregate of any such payments exceeds £20, £20 and 50 per cent. of the excess over £20.

10. If the applicant—
   (a) owns the freehold or leasehold interest in any property or is a tenant of any property; and
   (b) occupies a part of that property; and
   (c) has an agreement with another person allowing that person to occupy another part of that property on payment of rent and—
      (i) the amount paid by that person is less than £20 per week, the whole of that amount; or
      (ii) the amount paid is £20 or more per week, £20.

11. Where an applicant receives income under an annuity purchased with a loan, which satisfies the following conditions—
   (a) that the loan was made as part of a scheme under which not less than 90 per cent. of the proceeds of the loan were applied to the purchase by the person to whom it was made of an annuity ending with his life or with the life of the survivor of two or more persons (in this paragraph referred to as “the annuitants”) who include the person to whom the loan was made;
   (b) that at the time the loan was made the person to whom it was made or each of the annuitants had attained the age of 65;
   (c) that the loan was secured on a dwelling in Great Britain and the person to whom the loan was made or one of the annuitants owns an estate or interest in that dwelling;
   (d) that the person to whom the loan was made or one of the annuitants occupies the dwelling on which it was secured as his home at the time the interest is paid; and
   (e) that the interest payable on the loan is paid by the person to whom the loan was made or by one of the annuitants,
   the amount, calculated on a weekly basis, equal to—
      (i) where, or in so far as, section 369 of the Income and Corporation Taxes Act 1988 (mortgage interest payable under deduction of tax) applies to the payments of interest on the loan, the interest which is payable after deduction of a sum equal to income tax on such payments at the applicable percentage of income tax within the meaning of section 369(1A) of that Act;
      (ii) in any other case, the interest which is payable on the loan without deduction of such a sum.

12.—
   (1) Any payment, other than a payment to which sub-paragraph (2) applies, made to the applicant by Trustees in exercise of a discretion exercisable by them.
   (2) This sub-paragraph applies to payments made to the applicant by Trustees in exercise of a
discretion exercisable by them for the purpose of—
(a) obtaining food, ordinary clothing or footwear or household fuel;
(b) the payment of rent, council tax or water charges for which that applicant or his
partner is liable;
(c) meeting housing costs of a kind specified in Schedule 2 to the State Pension Credit
Regulations 2002.

(3) In a case to which sub-paragraph (2) applies, £20 or—
(a) if the payment is less than £20, the whole payment;
(b) if, in the applicant’s case, £10 is disregarded in accordance with paragraph 1(a) to
(g), £10 or the whole payment if it is less than £10; or
(c) if, in the applicant’s case, £15 is disregarded under paragraph 7 or paragraph 8
and—
(i) he has no disregard under paragraph 1(a) to (g), £5 or the whole payment if it
is less than £5;
(ii) he has a disregard under paragraph 1(a) to (g), nil.

(4) For the purposes of this paragraph, “ordinary clothing or footwear” means clothing or
footwear for normal daily use, but does not include school uniforms, or clothing and
footwear used solely for sporting activities.

13. Any increase in pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc.
(Disablement and Death) Service Pensions Order 2006 paid in respect of a dependent other
than the pensioner’s partner.

14. Any payment ordered by a court to be made to the applicant or the applicant’s partner in
consequence of any accident, injury or disease suffered by the person or a child of the person
to or in respect of whom the payments are made.

15. Periodic payments made to the applicant or the applicant’s partner under an agreement entered
into in settlement of a claim made by the applicant or, as the case may be, the applicant’s
partner for an injury suffered by him.

16. Any income which is payable outside the United Kingdom for such period during which there is a
prohibition against the transfer to the United Kingdom of that income.

17. Any banking charges or commission payable in converting to Sterling payments of income made in
a currency other than Sterling.

18. Where the applicant makes a parental contribution in respect of a student attending a course at
an establishment in the United Kingdom or undergoing education in the United Kingdom,
which contribution has been assessed for the purposes of calculating—
(a) under, or pursuant to regulations made under powers conferred by, section 22 of
the Teaching and Higher Education Act 1998, that student’s award;
(b) under regulations made in exercise of the powers conferred by section 49 of the
Education (Scotland) Act 1980, that student’s bursary, scholarship, or other
allowance under that section or under regulations made in exercise of the powers
conferred by section 73 of that Act of 1980, any payment to that student under that
section; or
(c) the student’s student loan,
an amount equal to the weekly amount of that parental contribution, but only in respect of the
period for which that contribution is assessed as being payable.

19.—
(1) Where the applicant is the parent of a student aged under 25 in advanced education who
either—
(a) is not in receipt of any award, grant or student loan in respect of that education; or

(b) is in receipt of an award bestowed by virtue of the Teaching and Higher Education Act 1998, or regulations made thereunder, or a bursary, scholarship or other allowance under section 49(1) of the Education (Scotland) Act 1980, or a payment under section 73 of that Act of 1980,

and the applicant makes payments by way of a contribution towards the student’s maintenance, other than a parental contribution falling within paragraph 18, an amount specified in sub-paragraph (2) in respect of each week during the student’s term.

(2) For the purposes of sub-paragraph (1), the amount is to be equal to—
(a) the weekly amount of the payments; or

(b) the amount by way of a personal allowance for a single applicant under 25 less the weekly amount of any award, bursary, scholarship, allowance or payment referred to in sub-paragraph (1)(b),

whichever is less.

20.—
(1) Where an applicant’s applicable amount includes an amount by way of a family premium, £15 of any payment of maintenance, whether under a court order or not, which is made or due to be made by the applicant’s spouse, civil partner, former spouse or former civil partner or the applicant’s partner’s spouse, civil partner, former spouse, or former civil partner.

(2) For the purposes of sub-paragraph (1), where more than one maintenance payment falls to be taken into account in any week, all such payments must be aggregated and treated as if they were a single payment.

21. 
Except in a case which falls under paragraph 10 of Schedule 5, where the applicant is a person who satisfies any of the conditions of sub-paragraph (2) of that paragraph, any amount of working tax credit up to £17.10.

22. 
Where the total value of any capital specified in Part 2 (capital disregarded only for the purposes of determining deemed income) of Schedule 9 does not exceed £10,000, any income actually derived from such capital.

23. 
Except in the case of income from capital specified in Part 2 of Schedule 9, any actual income from capital.

24. 
Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker’s allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 3) Regulations 1999 as in force at that date, the whole of his income.
Schedule 7
Sums disregarded in the calculation of earnings: persons (including lone parents with a child under 5 years of age) who are not pensioners,
1. In the case of an applicant who has been engaged in remunerative work as an employed earner or, had the employment been in Great Britain, would have been so engaged—
   (a) where—
   (i) the employment has been terminated because of retirement; and
   (ii) on retirement he is entitled to a retirement pension under the Act, or is not so entitled solely because of his failure to satisfy the contribution conditions, any earnings paid or due to be paid in respect of that employment, but only for a period commencing on the day immediately after the date on which the employment was terminated;
   (b) where before the first day of entitlement to support under this scheme the employment has been terminated otherwise than because of retirement, any earnings paid or due to be paid in respect of that employment except—
   (i) any payment of the nature described in—
       (aa) paragraph 51(1)(e) (retainer), or
       (bb) section 28, 64 or 68 of the Employment Rights Act 1996 (guarantee payments, suspension from work on medical or maternity grounds); and
   (ii) any award, sum or payment of the nature described in—
       (aa) paragraph 51(1)(g) or (i) (compensation etc. relating to employment), or
       (bb) section 34 or 70 of the Employment Rights Act 1996 (guarantee payments and suspension from work: complaints to employment tribunals), including any payment made following the settlement of a complaint to an employment tribunal or of court proceedings;
   (c) where before the first day of entitlement to support under this scheme—
   (i) the employment has not been terminated, but
   (ii) the applicant is not engaged in remunerative work, any earnings paid or due to be paid in respect of that employment except any payment or remuneration of the nature described in paragraph (b)(i) or (ii)(bb) or paragraph 51(1)(j) (statutory sick pay etc.).

2. In the case of an applicant who, before the first day of entitlement to support under this scheme—
   (a) has been engaged in part-time employment as an employed earner or, where the employment has been outside Great Britain, would have been so engaged had the employment been in Great Britain; and
   (b) has ceased to be engaged in that employment, whether or not that employment has been terminated, any earnings paid or due to be paid in respect of that employment except—
   (i) where that employment has been terminated, any payment of the nature described in paragraph 1(b)(i) or (ii)(bb);
   (ii) where that employment has not been terminated, any payment or remuneration of the nature described in paragraph 1(b)(i) or (ii)(bb) or paragraph 51(1)(j) (statutory sick pay etc.).

3. In the case of an applicant who has been engaged in remunerative work or part-time employment as a self-employed earner or, had the employment been in Great Britain, would have been so engaged and who has ceased to be so employed, from the date of the cessation of his employment, any earnings derived from that employment except earnings to which paragraph 53(3) and (4) (earnings of self-employed earners) apply.

4.—
   (1) In a case to which this paragraph applies and paragraph 5 does not apply, £20; but notwithstanding paragraph 33 (calculation of income and capital of members of an applicant’s family and of a polygamous marriage) if this paragraph applies to an applicant
it does not apply to his partner except where, and to the extent that, the earnings of the applicant which are to be disregarded under this paragraph are less than £20.

(2) This paragraph applies where the applicant’s applicable amount includes an amount by way of the disability premium, severe disability premium, work-related activity component or support component under Schedule 3 (applicable amounts: persons who are not pensioners).

(3) This paragraph applies where—
(a) the applicant is a member of a couple and his applicable amount includes an amount by way of the disability premium under Schedule 3; and
(b) he or his partner has not attained the qualifying age for state pension credit and at least one is engaged in employment.

5. In a case where the applicant is a lone parent, £25.

6.—
(1) In a case to which neither paragraph 4 nor paragraph 5 applies to the applicant and, subject to sub-paragraph (2), where the applicant’s applicable amount includes an amount by way of the carer premium under Schedule 3 (applicable amounts: persons who are not pensioners), £20 of the earnings of the person who is, or at any time in the preceding eight weeks was, in receipt of carer’s allowance or treated in accordance with paragraph 14(2) of that Schedule as being in receipt of carer’s allowance.

(2) Where the carer premium is awarded in respect of the applicant and of any partner of his, their earnings must for the purposes of this paragraph be aggregated, but the amount to be disregarded in accordance with sub-paragraph (1) must not exceed £20 of the aggregated amount.

7. Where the carer premium is awarded in respect of an applicant who is a member of a couple and whose earnings are less than £20, but is not awarded in respect of the other member of the couple, and that other member is engaged in an employment—
(a) specified in paragraph 9(1), so much of the other member’s earnings as would not when aggregated with the amount disregarded under paragraph 6 exceed £20;

(b) other than one specified in paragraph 9(1), so much of the other member’s earnings from such other employment up to £10 as would not when aggregated with the amount disregarded under paragraph 5 exceed £20.

8. In a case where paragraphs 4, 6, 7 and 9 do not apply to the applicant and he is one of a couple and a member of that couple is in employment, £10; but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant’s family and of a polygamous marriage), if this paragraph applies to an applicant it must not apply to his partner except where, and to the extent that, the earnings of the applicant which are to be disregarded under this paragraph are less than £10.

9.—
(1) In a case where paragraphs 4, 6, 7 and 9 do not apply to the applicant, £20 of earnings derived from one or more employments as—
(a) a part-time fire-fighter employed by a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004 or a scheme to which section 4 of that Act applies;

(b) a part-time fire-fighter employed by a fire and rescue authority (as defined in section 1 of the Fire (Scotland) Act 2005) or a joint fire and rescue board constituted by an
amalgamation scheme made under section 2(1) of that Act;

(c) an auxiliary coastguard in respect of coast rescue activities;

(d) a person engaged part-time in the manning or launching of a life boat;

(e) a member of any territorial or reserve force prescribed in Part I of Schedule 6 to the Social Security (Contributions) Regulations 2001;

but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant’s family and of a polygamous marriage), if this paragraph applies to an applicant it must not apply to his partner except to the extent specified in sub-paragraph (2).

(2) If the applicant’s partner is engaged in employment—
(a) specified in sub-paragraph (1), so much of his earnings as would not in aggregate with the amount of the applicant’s earnings disregarded under this paragraph exceed £20;
(b) other than one specified in sub-paragraph (1), so much of his earnings from that employment up to £10 as would not in aggregate with the applicant’s earnings disregarded under this paragraph exceed £20.

10. Where the applicant is engaged in one or more employments specified in paragraph 9(1), but his earnings derived from such employments are less than £20 in any week and he is also engaged in any other employment, so much of his earnings from that other employment, up to £5 if he is a single applicant, or up to £10 if he has a partner, as would not in aggregate with the amount of his earnings disregarded under paragraph 9 exceed £20.

11. In a case to which none of the paragraphs 4 to 10 applies, £5.

12.—
(1) Where—
(a) the applicant (or if the applicant is a member of a couple, at least one member of that couple) is a person to whom sub-paragraph (5) applies;
(b) the Secretary of State is satisfied that that person is undertaking exempt work as defined in sub-paragraph (6); and
(c) paragraph 14 does not apply,

the amount specified in sub-paragraph (7) (“the specified amount”).

(2) Where this paragraph applies, paragraphs 4 to 11 do not apply; but in any case where the applicant is a lone parent, and the specified amount would be less than the amount specified in paragraph 5, then paragraph 5 applies instead of this paragraph.

(3) Notwithstanding paragraph 33 (calculation of income and capital of members of applicant’s family and of a polygamous marriage), if sub-paragraph (1) applies to one member of a couple (“A”) it does not apply to the other member of that couple (“B”) except to the extent provided in sub-paragraph (4).

(4) Where A’s earnings are less than the specified amount, there must also be disregarded so much of B’s earnings as would not when aggregated with A’s earnings exceed the specified amount; but the amount of B’s earnings which may be disregarded under this sub-paragraph is limited to a maximum of £20 unless the Secretary of State is satisfied that B is also undertaking exempt work.

(5) This sub-paragraph applies to a person who is—
(a) in receipt of a contributory employment and support allowance;
(b) in receipt of incapacity benefit;
(c) in receipt of severe disablement allowance; or
(d) being credited with earnings on the grounds of incapacity for work or limited capability
for work under regulation 88 of the Social Security (Credits) Regulations 1975.

(6) “Exempt work” means work of the kind described in
(a) regulation 45(2), (3) or (4) of the Employment and Support Allowance Regulations 2008;
or (as the case may be)
(b) regulation 17(2), (3) or (4) of the Social Security (Incapacity for Work) (General) Regulations 1995,

and, in determining for the purposes of this paragraph whether an applicant or a member of
a couple is undertaking any type of exempt work, it is immaterial whether that person or
their partner is also undertaking other work.

(7) The specified amount is the amount of money from time to time mentioned in any
provision referred to in sub-paragraph (6) by virtue of which the work referred to in sub-
paragraph (1) is exempt (or, where more than one such provision is relevant and those
provisions mention different amounts of money, the highest of those amounts).

13. Any amount or the balance of any amount which would fall to be disregarded under paragraph 23
or 24 of Schedule 8 had the applicant's income which does not consist of earnings been
sufficient to entitle him to the full disregard thereunder.

14. Where an applicant is on income support, an income-based jobseeker’s allowance or an income-
related employment and support allowance, his earnings.

15. Any earnings derived from employment which are payable in a country outside the United
Kingdom for such period during which there is a prohibition against the transfer to the United
Kingdom of those earnings.

16. Where a payment of earnings is made in a currency other than Sterling, any banking charge or
commission payable in converting that payment into Sterling.

17. Any earnings of a child or young person.

18.—
(1) In a case where the applicant is a person who satisfies at least one of the conditions set
out in sub-paragraph (2), and his net earnings equal or exceed the total of the amounts
set out in sub-paragraph (3), the amount of his earnings that falls to be disregarded under
paragraphs 4 to 12 must be increased by £17.10.

(2) The conditions of this sub-paragraph are that—
(a) the applicant, or if he is a member of a couple, either the applicant or his partner, is a
person to whom regulation 20(1)(c) of the Working Tax Credit (Entitlement and
Maximum Rate) Regulations 2002 applies; or
(b) the applicant—
   (i) is, or if he is a member of a couple, at least one member of that couple is aged at
least 25 and is engaged in remunerative work for on average not less than 30
hours per week; or
   (ii) is a member of a couple and—
      (aa) at least one member of that couple, is engaged in remunerative work for on
average not less than 16 hours per week; and
      (bb) his applicable amount includes a family premium under paragraph 4 of
Schedule 3; or
   (iii) is a lone parent who is engaged in remunerative work for on average not less
than 16 hours per week; or
(iv) is, or if he is a member of a couple, at least one member of that couple is engaged in remunerative work for on average not less than 16 hours per week; and—

(aa) the applicant's applicable amount includes a disability premium under paragraph 9, the work-related activity component under paragraph 21 or the support component under paragraph 22 of Schedule 3 respectively;

(bb) where he is a member of a couple, at least one member of that couple satisfies the qualifying conditions for the disability premium or either of the components referred to in paragraph (aa) above and is engaged in remunerative work for on average not less than 16 hours per week; or

(c) the applicant is, or if he has a partner, one of them is, a person to whom regulation 18(3) of the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 (eligibility for 50 plus element) applies, or would apply if an application for working tax credit were to be made in his case.

(4) The following are the amounts referred to in sub-paragraph (1) —

(a) the amount calculated as disregardable from the applicant's earnings under paragraphs 4 to 12;

(b) the amount of child care charges calculated as deductible under paragraph 57(1)(c); and

(c) £17.10.

(4) The provisions of paragraph 10 (remunerative work) apply in determining whether or not a person works for on average not less than 30 hours per week, but as if the reference to 16 hours in sub-paragraph (1) of that paragraph were a reference to 30 hours.

19.
In this Schedule “part-time employment” means employment in which the person is engaged on average for less than 16 hours a week.
Schedule 8
Sums disregarded in the calculation of income other than earnings: persons who are not pensioners, including lone parents with a child under 5 years of age
1. Any payment made to the applicant in respect of any child care, travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Work for Your Benefit Pilot Scheme.

2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme.

3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme.

4. Any amount paid by way of tax on income which is to be taken into account under regulation 30 (calculation of income other than earnings).

5. Any payment in respect of any expenses incurred or to be incurred by an applicant who is—
   (a) engaged by a charitable or voluntary organisation, or
   (b) a volunteer,

   if he otherwise derives no remuneration or profit from the employment and is not to be treated as possessing any earnings under paragraph 56(5) (notional income: persons who are not pensioners).

6. Any payment in respect of expenses arising out of the applicant’s participation in a service user group.

7. In the case of employment as an employed earner, any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment.

8. Where an applicant is on income support, an income-based jobseeker’s allowance or an income-related employment and support allowance, the whole of his income.

9. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act and his partner is on an income-based jobseeker’s allowance, the whole of the applicant’s income.

10. Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker’s allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 9) Regulations 1999 as in force at that date, the whole of his income.

11. Any disability living allowance, personal independence payment or an AFIP.

12. Any concessionary payment made to compensate for the non-payment of—
   (a) any payment specified in paragraph 11 or 14;
   (b) income support;
   (c) an income-based jobseeker’s allowance;
   (d) an income-related employment and support allowance.

13. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983 or any
payment intended to compensate for the non-payment of such a supplement.

14.
Any attendance allowance.

15.
Any payment to the applicant as holder of the Victoria Cross or of the George Cross or any analogous payment.

16.—
(1) Any payment—
(a) by way of an education maintenance allowance made pursuant to—
(i) regulations made under section 518 of the Education Act 1996 (payment of school expenses; grant of scholarships etc.);
(ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980 (power to assist persons to take advantage of educational facilities);
(iii) directions made under section 732A of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;

(b) corresponding to such an education maintenance allowance, made pursuant to—
(i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and the Welsh Ministers to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or
(ii) regulations made under section 181 of that Act; or
(c) in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

(2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to—
(a) regulations made under section 518 of the Education Act 1996;
(b) regulations made under section 49 of the Education (Scotland) Act 1980; or
(c) directions made under section 732A of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,

in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).

17.
Any payment made to the applicant by way of a repayment under regulation 11(2) of the Education (Teacher Student Loans) (Repayment etc.) Regulations 2002.

18.—
(1) Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990 except a payment—
(a) made as a substitute for income support, a jobseeker’s allowance, incapacity benefit, severe disablement allowance or an employment and support allowance;
(b) of an allowance referred to in section 2(3) of the Employment and Training Act 1973 or section 2(5) of the Enterprise and New Towns (Scotland) Act 1990; or
(c) intended to meet the cost of living expenses which relate to any one or more of the items specified in sub-paragraph (2) whilst an applicant is participating in an education, training or other scheme to help him enhance his employment prospects unless the payment is a Career Development Loan paid pursuant to section 2 of the 1973 Act and the period of education or training or the scheme, which is supported by that loan, has been completed.

(2) The items specified in this sub-paragraph for the purposes of sub-paragraph (1)(c) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

19.—
(1) Subject to sub-paragraph (2), any of the following payments—
(a) a charitable payment;
(b) a voluntary payment;
(c) a payment (not falling within paragraph (a) or (b) above) from a trust whose funds are
derived from a payment made in consequence of any personal injury to the applicant;
(d) a payment under an annuity purchased—
(i) pursuant to any agreement or court order to make payments to the applicant; or
(ii) from funds derived from a payment made,
in consequence of any personal injury to the applicant; or
(e) a payment (not falling within paragraphs (a) to (d)) received by virtue of any agreement
or court order to make payments to the applicant in consequence of any personal
injury to the applicant.

(2) Sub-paragraph (1) does not apply to a payment which is made or due to be made by—
(a) a former partner of the applicant, or a former partner of any member of the applicant's
family; or
(b) the parent of a child or young person where that child or young person is a member of
the applicant's family.

20.
Subject to paragraph 40, any of the following, namely—
(a) a war disablement pension (except insofar as such a pension falls to be disregarded
under paragraph 13 or 14);
(b) a war widow's pension or war widower's pension;
(c) a pension payable to a person as a widow, widower or surviving civil partner under any
power of Her Majesty otherwise than under an enactment to make provision about
pensions for or in respect of persons who have been disabled or have died in
consequence of service as members of the armed forces of the Crown;
(d) a guaranteed income payment and, if the amount of that payment has been abated to
less than £10 by a pension or payment falling within article 31(1)(a) or (b) of the Armed
Forces and Reserve Forces (Compensation Scheme) Order 2005, so much of that
pension or payment as would not, in aggregate with the amount of any guaranteed
income payment disregarded, exceed £10;
(e) a payment made to compensate for the non-payment of such a pension or payment as
is mentioned in any of the preceding sub-paragraphs;
(f) a pension paid by the government of a country outside Great Britain which is analogous
to any of the pensions or payments mentioned in paragraphs (a) to (d) above;
(g) pension paid to victims of National Socialist persecution under any special provision
made by the law of the Federal Republic of Germany, or any part of it, or of the
Republic of Austria.

21.
Subject to paragraph 40, £15 of any—
(a) widowed mother's allowance paid pursuant to section 37 of the SSCBA;
(b) widowed parent's allowance paid pursuant to section 39A of the SSCBA.

22.—
(1) Any income derived from capital to which the applicant is or is treated under paragraph
70 (capital jointly held) as beneficially entitled but, subject to sub-paragraph (2), not
income derived from capital disregarded under paragraphs 4, 5, 7, 11, 17 or 30 to 33 of
Schedule 10.

(2) Income derived from capital disregarded under paragraphs 5, 7 or 30 to 33 of Schedule 10
but only to the extent of—
(a) any mortgage repayments made in respect of the dwelling or premises in the period
during which that income accrued; or
(b) any council tax or water charges which the applicant is liable to pay in respect of the
dwelling or premises and which are paid in the period during which that income
accrued.

(3) The definition of ““water charges”” in paragraph 2(1) (interpretation) applies to sub-
paragraph (2) of this paragraph with the omission of the words ““in so far as such charges
are in respect of the dwelling which a person occupies as his home””.

23.
Where the applicant makes a parental contribution in respect of a student attending a course at
an establishment in the United Kingdom or undergoing education in the United Kingdom,
which contribution has been assessed for the purposes of calculating—
(a) under, or pursuant to regulations made under powers conferred by, section 22 of the
Teaching and Higher Education Act 1998, that student’s award;
(b) under regulations made in exercise of the powers conferred by section 49 of the
Education (Scotland) Act 1980, that student’s bursary, scholarship, or other allowance
under that section or under regulations made in exercise of the powers conferred by
section 73 of that Act of 1980, any payment to that student under that section; or
(c) the student’s student loan,
an amount equal to the weekly amount of that parental contribution, but only in respect of the
period for which that contribution is assessed as being payable.

24.—
(1) Where the applicant is the parent of a student aged under 25 in advanced education who
either—
(a) is not in receipt of any award, grant or student loan in respect of that education; or
(b) is in receipt of an award bestowed by virtue of the Teaching and Higher Education Act
1998, or regulations made thereunder, or a bursary, scholarship or other allowance
under section 49(1) of the Education (Scotland) Act 1980, or a payment under section
73 of that Act of 1980,

and the applicant makes payments by way of a contribution towards the student’s
maintenance, other than a parental contribution falling within paragraph 23, an amount
specified in sub-paragraph (2) in respect of each week during the student’s term.

(2) For the purposes of sub-paragraph (1), the amount must be equal to—
(a) the weekly amount of the payments; or
(b) the amount by way of a personal allowance for a single applicant under 25 less the
weekly amount of any award, bursary, scholarship, allowance or payment referred to in
sub-paragraph (1)(b),

whichever is less.

25.
Any payment made to the applicant by a child or young person or a non-dependant.

26.
Where the applicant occupies a dwelling as his home and the dwelling is also occupied by a person
other than one to whom paragraph 25 or 27 refers and there is a contractual liability to make
payments to the applicant in respect of the occupation of the dwelling by that person or a
member of his family—
(a) where the aggregate of any payments made in respect of any one week in respect of
the occupation of the dwelling by that person or a member of his family, or by that
person and a member of his family, is less than £20, the whole of that amount; or
(b) where the aggregate of any such payments is £20 or more per week, £20.

27.
Where the applicant occupies a dwelling as his home and he provides in that dwelling board and
lodging accommodation, an amount, in respect of each person for which such accommodation is provided for the whole or any part of a week, equal to—
(a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20, 100 per cent of such payments;
(b) where the aggregate of any such payments exceeds £20, £20 and 50 per cent of the excess over £20.

28.—
(1) Any income in kind, except where paragraph 54(10)(b) (provision of support under section 95 or 98 of the Immigration and Asylum Act 1999 in the calculation of income other than earnings) applies.
(2) The reference in sub-paragraph (1) to “income in kind” does not include a payment to a third party made in respect of the applicant which is used by the third party to provide benefits in kind to the applicant.

29.
Any income which is payable in a country outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.

30.—
(1) Any payment made to the applicant in respect of a person who is a member of his family—
(a) pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002 or in accordance or with a scheme approved by the Scottish Ministers under section 51A of the Adoption (Scotland) Act 1978 (schemes for payments of allowances to adopters) or in accordance with an adoption allowance scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (adoption allowances schemes);
(b) which is a payment made by a local authority in pursuance of section 15(1) of, and paragraph 15 of Schedule 1 to, the Children Act 1989 (local authority contribution to a child’s maintenance where the child is living with a person as a result of a residence order) or in Scotland section 50 of the Children Act 1975 (payments towards maintenance of children);
(c) which is a payment made by an authority, as defined in Article 2 of the Children (Northern Ireland) Order 1995, in pursuance of Article 15 of, and paragraph 17 of Schedule 1 to, that Order (contribution by an authority to child’s maintenance);
(d) in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services);
(2) Any payment, other than a payment to which sub-paragraph (1)(a) applies, made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.

31.
Any payment made to the applicant with whom a person is accommodated by virtue of arrangements made—
(a) by a local authority under—
(i) section 23(2)(a) of the Children Act 1989 (provision of accommodation and maintenance for a child whom they are looking after),
(ii) section 26 of the Children (Scotland) Act 1995 (manner of provision of accommodation to child looked after by local authority), or
(iii) regulations 33 or 51 of the Looked After Children (Scotland) Regulations 2009 (fostering and kinship care allowances and fostering allowances); or
(b) by a voluntary organisation under section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations).

32.
Any payment made to the applicant or his partner for a person (“the person concerned”), who is not normally a member of the applicant’s household but is temporarily in his care, by—
(a) a health authority;
(b) a local authority but excluding payments of housing benefit made in respect of the
person concerned;
(c) a voluntary organisation;
(d) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;
(e) a primary care trust established under section 16A of the National Health Service Act
1977 or established by an order made under section 18(2)(c) of the National Health
Service Act 2006; or

(f) a Local Health Board established under section 11 of the National Health Service (Wales)
Act 2006.

33. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the
Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or
section 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and
their families and advice and assistance to certain children).

34.—
(1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local
authority in accordance with section 23C of the Children Act 1989 or section 29 of the
Children (Scotland) Act 1995 (local authorities’ duty to promote welfare of children and
powers to grant financial assistance to persons in, or formerly in, their care) to a person
(“A”) which A passes on to the applicant.

(2) Sub-paragraph (1) applies only where A—
(a) was formerly in the applicant’s care, and
(b) is aged 18 or over, and
(c) continues to live with the applicant.

35.—
(1) Subject to sub-paragraph (2), any payment received under an insurance policy taken out
to insure against the risk of being unable to maintain repayments—
(a) on a loan which is secured on the dwelling which the applicant occupies as his home; or

(b) under a regulated agreement as defined for the purposes of the Consumer Credit Act
1974 or under a hire-purchase agreement or a conditional sale agreement as defined
for the purposes of Part 3 of the Hire-Purchase Act 1964.

(2) A payment referred to in sub-paragraph (1) is only to be disregarded to the extent that
the payment received under that policy does not exceed the amounts, calculated on a
weekly basis, which are used to—
(a) maintain the repayments referred to in sub-paragraph (1)(a) or, as the case may be,
(1)(b); and

(b) meet any amount due by way of premiums on—
(i) that policy; or

(ii) in a case to which sub-paragraph (1)(a) applies, an insurance policy taken out to
insure against loss or damage to any building or part of a building which is occupied
by the applicant as his home and which is required as a condition of the loan referred
to in sub-paragraph (1)(a).

36. Any payment of income which by virtue of paragraph 64 (income treated as capital: persons who
are not pensioners) is to be treated as capital.

37. Any—
(a) social fund payment made pursuant to Part 8 of the SSCBA (the social fund); or
(b) occasional assistance.

38. Any payment under Part 10 of the SSCBA (Christmas bonus for pensioners).

39. Where a payment of income is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

40. The total of an applicant’s income or, if he is a member of a family, the family’s income and the income of any person which he is treated as possessing under paragraph 33(3) (calculation of income and capital of members of applicant’s family and of a polygamous marriage) to be disregarded under paragraph 77(2)(b) and paragraph 78(1)(d) (calculation of covenant income where a contribution assessed, covenant income where no grant income or no contribution is assessed), paragraph 81(2) (treatment of student loans), paragraph 82(3) (treatment of payments from access funds) and paragraphs 20 and 21 must in no case exceed £20 per week.

41.—

(1) Any payment made under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

(a) that person’s partner or former partner from whom he is not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person’s death;

(b) any child who is a member of that person’s family or who was such a member and who is a member of the applicant’s family; or

(c) any young person who is a member of that person’s family or who was such a member and who is a member of the applicant’s family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—

(a) the person who is suffering from haemophilia or who is a qualifying person;

(b) any child who is a member of that person’s family or who was such a member and who is a member of the applicant’s family; or

(c) any young person who is a member of that person’s family or who was such a member and who is a member of the applicant’s family.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—

(a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person’s family;
and

(b) the payment is made either—
   (i) to that person's parent or step-parent, or

(ii) where that person at the date of the payment is a child, a young person or a student who has not completed his education and has no parent or step-parent, to his guardian,

but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—
   (a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who was or had been a member of his family; and

(b) the payment is made either—
   (i) to that person's parent or step-parent, or

(ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian,

but only for a period of two years from the relevant date.

(6) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any income which derives from any payment of income or capital made under or deriving from any of the Trusts.

(7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts is to be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation and the London Bombings Relief Charitable Fund.

42. Any housing benefit.

43. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.

44. Any payment to a juror or witness in respect of attendance at a court other than compensation for loss of earnings or for the loss of a benefit payable under the benefit Acts.

45. Any payment in consequence of a reduction of council tax under section 13 of the 1992 Act (reduction of liability for council tax).

46.—(1) Any payment or repayment made—
   (a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);

   (b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);
(c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies).

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers which is analogous to a payment or repayment mentioned in sub-paragraph (1).

47. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins).

48. Any payment made by either the Secretary of State for Justice or by the Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody.

49.—

(1) Only where the applicant is a lone parent with a child under 5 years of age and whose applicable amount includes an amount by way of family premium, £15 of any payment of maintenance, other than child maintenance, whether under a court order or not, which is made or due to be made by the applicant's former partner, or the applicant's partner's former partner.

(2) For the purpose of sub-paragraph (1) where more than one maintenance payment falls to be taken into account in any week, all such payments must be aggregated and treated as if they were a single payment.

(3) A payment made by the Secretary of State in lieu of maintenance must, for the purpose of sub-paragraph (1), be treated as a payment of maintenance made by a person specified in sub-paragraph (1).

50.—

(1) Only where the applicant is a lone parent with a child under 5 years of age, any payment of child maintenance made or derived from a liable relative where the child or young person in respect of whom the payment is made is a member of the applicant's family, except where the person making the payment is the applicant or the applicant's partner.

(2) In sub-paragraph (1) — “child maintenance” means any payment towards the maintenance of a child or young person, including any payment made voluntarily and payments made under—(a) the Child Support Act 1991;

(b) the Child Support (Northern Ireland) Order 1991;

(c) a court order;

(d) a consent order;

(e) a maintenance agreement registered for execution in the Books of Council and Session or the sheriff court books;

“liable relative” means a person listed in regulation 54 (interpretation) of the Income Support (General) Regulations 1987, other than a person falling within sub-paragraph (d) of that definition.
51. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.

52. Any guardian's allowance.

53.—
(1) If the applicant is in receipt of any benefit under Part 2, 3 or 5 of the SSCBA, any increase in the rate of that benefit arising under Part 4 (increases for dependants) or section 106(a) (unemployability supplement) of that Act, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.

(2) If the applicant is in receipt of any pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006, any increase in the rate of that pension or allowance under that Order, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.

54. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.

55. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians)Scheme 1983 (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

56.—
(1) Any payment which is—
(a) made under any of the Dispensing Instruments to a widow, widower or surviving civil partner of a person—
(i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and

(ii) whose service in such capacity terminated before 31st March 1973; and

(b) equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

(2) In this paragraph “the Dispensing Instruments” means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

57. Any council tax support to which the applicant is entitled.

58. Except in a case which falls under sub-paragraph (1) of paragraph 18 of Schedule 7, where the applicant is a person who satisfies any of the conditions of sub-paragraph (2) of that paragraph, any amount of working tax credit up to £17.10.

59. Any payment made under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care) or under regulations made under section 57 of the Health and Social Care Act 2001 (direct payments).

60.—
(1) Subject to sub-paragraph (2), in respect of a person who is receiving, or who has received, assistance under the self-employment route, any payment to that person—
(a) to meet expenses wholly and necessarily incurred whilst carrying on the commercial activity;
(b) which is used or intended to be used to maintain repayments on a loan taken out by that person for the purpose of establishing or carrying on the commercial activity, in respect of which such assistance is or was received.

(2) Sub-paragraph (1) applies only in respect of payments which are paid to that person from the special account.

61.—
(1) Any payment of a sports award except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).

(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

(3) For the purposes of sub-paragraph (2) “food” does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

62. Where the amount of subsistence allowance paid to a person in a support week exceeds the amount of income-based jobseeker’s allowance that person would have received in that support week had it been payable to him, less 50p, that excess amount.

63. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise.

64. Any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001.

65.—
(1) Any payment made by a local authority or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.

(2) For the purposes of sub-paragraph (1) “local authority” includes, in England, a county council.

66. Any payment of child benefit.
Schedule 9
Capital disregards: pensioners
1. Any premises acquired for occupation by the applicant which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.

2. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.

3. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.

4. Any premises occupied in whole or in part—
   (a) by a person who is a relative of the applicant or his partner as his home where that person has attained the qualifying age for state pension credit or is incapacitated;

   (b) by the former partner of the applicant as his home; but this provision does not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.

5. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub-leases or sub-tenancies.

6. Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from his former partner or the dissolution of a civil partnership with his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

7. Any premises where the applicant is taking reasonable steps to dispose of the whole of his interest in those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.

8. All personal possessions.

9. The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner or, if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of those assets.

10. The assets of any business owned in whole or in part by the applicant if—
   (a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but

   (b) he intends to become engaged (or, as the case may be, re-engaged) as a self-employed earner in that business as soon as he recovers or is able to become engaged, or re-engaged, in that business,

   for a period of 26 weeks from the date on which the application for support under this scheme is made or, if it is unreasonable to expect him to become engaged or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him
to become so engaged or re-engaged.

11. The surrender value of any policy of life insurance.

12. The value of any funeral plan contract; and for this purpose, “funeral plan contract” means a contract under which—
(a) the applicant makes one or more payments to another person (“the provider”);
(b) the provider undertakes to provide, or secure the provision of, a funeral in the United Kingdom for the applicant on his death; and
(c) the sole purpose of the plan is to provide or secure the provision of a funeral for the applicant on his death.

13. Where an ex-gratia payment has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or internment of—
(a) the applicant;
(b) the applicant’s partner;
(c) the applicant’s deceased spouse or deceased civil partner; or
(d) the applicant’s partner’s deceased spouse or deceased civil partner,
by the Japanese during the Second World War, an amount equal to that payment.

14.—
(1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or an applicant’s partner who is—
(a) a diagnosed person;
(b) a diagnosed person’s partner or was a diagnosed person’s partner at the time of the diagnosed person’s death; or
(c) a parent of a diagnosed person, a person acting in place of the diagnosed person’s parents or a person who was so acting at the date of the diagnosed person’s death.

(2) Where a trust payment is made to—
(a) a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;
(b) a person referred to in sub-paragraph (1)(c), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending two years after that date.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or an applicant’s partner who is—
(a) the diagnosed person;
(b) a diagnosed person’s partner or was a diagnosed person’s partner at the date of the diagnosed person’s death; or
(c) a parent of a diagnosed person, a person acting in place of the diagnosed person’s parents or a person who was so acting at the date of the diagnosed person’s death.
(4) Where a payment such as referred to in sub-paragraph (3) is made to—
(a) a person referred to in sub-paragraph (3)(a) or (b), that sub-paragraph applies for the period beginning on the date on which the payment is made and ending on the date on which that person dies;

(b) a person referred to in sub-paragraph (3)(c), that sub-paragraph applies for the period beginning on the date on which the payment is made and ending two years after that date.

(5) In this paragraph, a reference to a person—
(a) being the diagnosed person’s partner;

(b) acting in place of the diagnosed person’s parents,

at the date of the diagnosed person’s death includes a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home or an independent hospital.

(6) In this paragraph—
“diagnosed person” means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeldt-Jakob disease;
“relevant trust” means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeldt-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;
“trust payment” means a payment under a relevant trust.

15.
The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant’s partner, the applicant’s deceased spouse or civil partner or the applicant’s partner’s deceased spouse or civil partner—
(a) was a slave labourer or a forced labourer;

(b) had suffered property loss or had suffered personal injury; or

(c) was a parent of a child who had died,
during the Second World War.

16.—
(1) Any payment made under or by—
(a) the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, or the London Bombings Relief Charitable Fund (collectively referred to in this paragraph as “the Trusts”); or

(b) the Independent Living Fund (2006).

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts and which is made to or for the benefit of that person’s partner or former partner—
(a) from whom he is not, or where that person has died was not, estranged or divorced, or

(b) with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person’s death.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering
or who suffered from haemophilia or who is or was a qualifying person which derives from a payment made under or by any of the Trusts and which is made to or for the benefit of the person who is suffering from haemophilia or who is a qualifying person.

(4) Sub-paragraph (3) does not apply if—
(a) the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced, or
(b) where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death.

(5) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts, where—
(a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child who is or had been a member of that person’s household; and
(b) the payment is made either—
(i) to that person’s parent or step-parent; or
(ii) where that person at the date of the payment is a child or a student who has not completed his full-time education and has no parent or step-parent, to any person standing in the place of his parent,

but only for a period from the date of the payment until the end of two years from that person’s death.

(6) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts, where—
(a) that person at the date of his death ("the relevant date") had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child who was or had been a member of his household; and
(b) the payment is made either—
(i) to that person’s parent or step-parent; or
(ii) where that person at the relevant date was a child or a student who had not completed his full-time education and had no parent or step-parent, to any person standing in place of his parent,
but only for a period of two years from the relevant date.

(7) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts.

17.—
(1) An amount equal to the amount of any payment made in consequence of any personal injury to the applicant or, if the applicant has a partner, to the partner.

(2) Where the whole or part of the payment is administered—
(a) by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998, or the Court of Protection, or on behalf of a person where the payment can only be disposed of by order or direction of any such court;
(b) in accordance with an order made under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules; or
(c) in accordance with the terms of a trust established for the benefit of the applicant or his partner,
the whole of the amount so administered.

18. Any amount specified in paragraph 19, 20, 21 or 25 for a period of one year beginning with the date of receipt.

19. Amounts paid under a policy of insurance in connection with the loss of or damage to the property occupied by the applicant as his home and to his personal possessions.

20. So much of any amounts paid to the applicant or deposited in the applicant’s name for the sole purpose of—
(a) purchasing premises which the applicant intends to occupy as his home; or
(b) effecting essential repairs or alterations to the premises occupied or intended to be occupied by the applicant as his home.

21.—
(1) Subject to paragraph 22 any amount paid—
(a) by way of arrears of benefit;
(b) by way of compensation for the late payment of benefit;
(c) in lieu of the payment of benefit;
(d) to rectify, or compensate for, an official error, as defined for the purposes of paragraph 22, being an amount to which that paragraph does not apply;
(e) by a local authority out of funds provided under either section 93 of the Local Government Act 2000 under a scheme known as “Supporting People” or section 91 of the Housing (Scotland) Act 2001.

(2) In sub-paragraph (1), “benefit” means
(a) attendance allowance under section 64 of the Act;
(b) disability living allowance;
(c) personal independence payment;
(d) an AFIP;
(e) income support;
(f) income-based jobseeker’s allowance;
(g) state pension credit;
(h) housing benefit;
(i) council tax benefit;
(j) child tax credit;
(k) an increase of a disablement pension under section 104 of the SSCBA (increase where constant attendance is needed), and any further increase of such a pension under section 105 of the Act (increase for exceptionally severe disablement);
(l) any amount included on account of the applicant’s exceptionally severe disablement or need for constant attendance in a war disablement pension or a war widow’s or widower’s pension;
(m) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;
(n) working tax credit; or
(o) income-related employment and support allowance.

22.—
(1) Subject to sub-paragraph (3), any payment of £5,000 or more which has been made to rectify, or to compensate for, an official error relating to a relevant benefit and which has been received by the applicant in full on or after the day on which he became entitled to support under this scheme.

(2) Subject to sub-paragraph (3), the total amount of any payments disregarded under—
(a) paragraph 7(2) of Schedule 10 to the Income Support (General) Regulations 1987;
where the award in respect of which the payments last fell to be disregarded under those Regulations either terminated immediately before the relevant date or is still in existence at that date.

(3) Any disregard which applies under sub-paragraph (1) or (2) has effect until the award comes to an end.

(4) In this paragraph—
"the award", except in sub-paragraph (2), means
(a) the award of support under the authority's scheme during which the relevant sum or, where it is paid in more than one instalment, the first instalment of that sum is received; and
(b) where that award is followed by one or more further awards which, or each of which, begins immediately after the previous award ends, such further awards until the end of the last such award, provided that, for such further awards, the applicant—
(i) is the person who received the relevant sum;  
(ii) is the partner of that person; or
(iii) was the partner of that person at the date of his death;

"official error"  
(a) where the error relates to housing benefit, or council tax benefit (in respect of any period before 1st April 2013), has the meaning given by regulation 1(2) of the Housing Benefit and Council Tax Benefit (Decisions and Appeals) Regulations 2001; and
(b) where the error relates to any other relevant benefit, has the meaning given by regulation 1(3) of the Social Security and Child Support (Decisions and Appeals) Regulations 1999;

"the relevant date" means the date on which the application for support under this scheme was made;
"relevant benefit" means any benefit specified in paragraph 21(2); and
"the relevant sum" means the total amount referred to in sub-paragraph (1).

23. Where a capital asset is held in a currency other than Sterling, any banking charge or commission payable in converting that capital into Sterling.

24. The value of the right to receive income from an occupational pension scheme or a personal pension scheme.

25. Any arrears of supplementary pension which is disregarded under paragraph 4 of Schedule 6 (amounts to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 5 or 6 of that Schedule.

26. The dwelling occupied as the home; but only one dwelling is to be disregarded under this paragraph.

27.—
(1) Subject to sub-paragraph (2), where an applicant falls within class C (Alternative Maximum Council Tax Support: pensioners), the whole of his capital.  
(2) Sub-paragraph (1) does not apply where an applicant falls within class B and class C.

28.
Where a person elects to be entitled to a lump sum under Schedule 5 or 5A to SSCBA or under Schedule 1 to the Social Security (Graduated Retirement Benefit) Regulations 2005, or is treated as having made such an election, and a payment has been made pursuant to that election, an amount equal to—
(a) except where sub-paragraph (b) applies, the amount of any payment or payments made on account of that lump sum;
(b) the amount of that lump sum,
but only for so long as that person does not change that election in favour of an increase of pension or benefit.

29. Any payments made by virtue of regulations made under—
(a) section 57 of the Health and Social Care Act 2001 (direct payments);
(b) section 12B of the Social Work (Scotland) Act 1968 (direct payments in respect of community care services);
(c) sections 12A to 12C of the National Health Service Act 2006 (direct payments for health care);
(d) Article 15 of the Health and Personal Social Services (Northern Ireland) Order 1972 (general social welfare); or
(e) section 8 of the Carers and Direct Payments Act (Northern Ireland) 2002 (direct payments).

Capital disregarded only for the purposes of determining deemed income

30. The value of the right to receive any income under a life interest or from a life rent.

31. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.

32. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

33. Where property is held under a trust, other than—
(a) a charitable trust within the meaning of the Charities Act 1993; or
(b) a trust set up with any payment to which paragraph 16 applies,
and under the terms of the trust, payments fall to be made, or the trustees have a discretion to make payments, to or for the benefit of the applicant or the applicant's partner, or both, that property.
Schedule 10
Capital disregards: persons who are not pensioners, including lone parents with a child under 5 years of age
1. Any payment made to the applicant in respect of any child care, travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Work for Your Benefit Scheme but only for 52 weeks beginning with the date of receipt of the payment.

2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme but only for 52 weeks beginning with the date of receipt of the payment.

3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme but only for 52 weeks beginning with the date of receipt of the payment.

4. The dwelling together with any garage, garden and outbuildings, normally occupied by the applicant as his home including any premises not so occupied which it is impracticable or unreasonable to sell separately, but, notwithstanding paragraph 33 (calculation of income and capital of members of applicant's family and of a polygamous marriage), only one dwelling is to be disregarded under this paragraph.

5. Any premises acquired for occupation by the applicant which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.

6. Any sum directly attributable to the proceeds of sale of any premises formerly occupied by the applicant as his home which is to be used for the purchase of other premises intended for such occupation within 26 weeks of the date of sale or such longer period as is reasonable in the circumstances to enable the applicant to complete the purchase.

7. Any premises occupied in whole or in part—
   (a) by a partner or relative of a single applicant or any member of the family as his home where that person has attained the qualifying age for state pension credit or is incapacitated;

   (b) by the former partner of the applicant as his home; but this provision does not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.

8. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance, the whole of his capital.

9. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act 1995 and his partner is on income-based jobseeker's allowance, the whole of the applicant's capital.

10. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub-leases or sub-tenancies.

11.—
   (1) The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner, or if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of any such asset.
(2) The assets of any business owned in whole or in part by the applicant where—
(a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but

(b) he intends to become engaged or, as the case may be, re-engaged as a self-employed earner in that business as soon as he recovers or is able to become engaged or re-engaged in that business,

for a period of 26 weeks from the date on which the application for support under this scheme is made, or is treated as made, or, if it is unreasonable to expect him to become engaged or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him to become so engaged or re-engaged.

(3) In the case of a person who is receiving assistance under the self-employment route, the assets acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is being received.

(4) In the case of a person who has ceased carrying on the commercial activity in respect of which assistance was received as specified in sub-paragraph (3), the assets relating to that activity for such period as may be reasonable in the circumstances to allow for disposal of any such asset.

12.—
(1) Subject to sub-paragraph (2), any arrears of, or any concessionary payment made to compensate for arrears due to the non-payment of—
(a) any payment specified in paragraphs 11, 13 or 14 of Schedule 8;
(b) an income-related benefit under Part 7 of the SSCBA;
(c) an income-based jobseeker’s allowance;
(d) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;
(e) working tax credit and child tax credit;
(f) an income-related employment and support allowance,

but only for a period of 52 weeks from the date of the receipt of arrears or of the concessionary payment.

(2) In a case where the total of any arrears and, if appropriate, any concessionary payment referred to in sub-paragraph (1) relating to one of the specified payments, benefits or allowances amounts to £5,000 or more (referred to in this sub-paragraph and in sub-paragraph (3) as “the relevant sum”) and is—
(a) paid in order to rectify or to compensate for, an official error as defined in regulation 1(2) of the Housing Benefit and Council Tax Benefit (Decisions and Appeals) Regulations 2001; and
(b) received by the applicant in full on or after 14th October 2001,
sub-paragraph (1) has effect in relation to such arrears or concessionary payment either for a period of 52 weeks from the date of receipt, or, if the relevant sum is received in its entirety during the period of an award of support under this scheme, for the remainder of that period if that is a longer period.

(3) For the purposes of sub-paragraph (2), “the period of an award of support under this scheme” means
(a) the award in which the relevant sum is first received (or the first part thereof where it is paid in more than one instalment); and
(b) where that award is followed by one or more further awards which, or each of which, begins immediately after the end of the previous award, such further award provided that for that further award the applicant—
(i) is the person who received the relevant sum; or
(ii) is the partner of the person who received the relevant sum, or was that person's partner at the date of his death.

13. Any sum—
   (a) paid to the applicant in consequence of damage to, or loss of the home or any personal possession and intended for its repair or replacement; or
   (b) acquired by the applicant (whether as a loan or otherwise) on the express condition that it is to be used for effecting essential repairs or improvement to the home, which is to be used for the intended purpose, for a period of 26 weeks from the date on which it was so paid or acquired or such longer period as is reasonable in the circumstances to effect the repairs, replacement or improvement.

14. Any sum—
   (a) deposited with a housing association as defined in section 1(1) of the Housing Associations Act 1985 as a condition of occupying the home;
   (b) which was so deposited and which is to be used for the purchase of another home, for the period of 26 weeks or such longer period as may be reasonable in the circumstances to enable the applicant to complete the purchase.

15. Any personal possessions except those which have been acquired by the applicant with the intention of reducing his capital in order to secure entitlement to support under this scheme or to increase the amount of that support.

16. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

17. Where the funds of a trust are derived from a payment made in consequence of any personal injury to the applicant or applicant's partner, the value of the trust fund and the value of the right to receive any payment under that trust.

18.—
   (1) Any payment made to the applicant or the applicant's partner in consequence of any personal injury to the applicant or, as the case may be, the applicant's partner.
   (2) But sub-paragraph (1)—
      (a) applies only for the period of 52 weeks beginning with the day on which the applicant first receives any payment in consequence of that personal injury;
      (b) does not apply to any subsequent payment made to him in consequence of that injury (whether it is made by the same person or another);
      (c) ceases to apply to the payment or any part of the payment from the day on which the applicant no longer possesses it;
      (d) does not apply to any payment from a trust where the funds of the trust are derived from a payment made in consequence of any personal injury to the applicant.
   (3) For the purposes of sub-paragraph (2)(c), the circumstances in which an applicant no longer possesses a payment or a part of it include where the applicant has used a payment or part of it to purchase an asset.
   (4) References in sub-paragraphs (2) and (3) to the applicant are to be construed as including references to his partner (where applicable).

19. The value of the right to receive any income under a life interest or from a life rent.

20. The value of the right to receive any income which is disregarded under paragraph 15 of Schedule 7 or paragraph 29 of Schedule 8.
21. The surrender value of any policy of life insurance.

22. Any payment of capital falls to be made by instalments, the value of the right to receive any outstanding instalments.

23. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or sections 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).

24.—
(1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989 or section 29 of the Children (Scotland) Act 1995 (local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ("A") which A passes on to the applicant.

(2) Sub-paragraph (1) applies only where A—
(a) was formerly in the applicant's care, and
(b) is aged 18 or over, and
(c) continues to live with the applicant.

25. Any—
(a) social fund payment made pursuant to Part 8 of the SSCBA (the social fund); or
(b) occasional assistance.

26. Any refund of tax which falls to be deducted under section 369 of the Income and Corporation Taxes Act 1988 (deduction of tax from certain loan interest) on a payment of relevant loan interest for the purpose of acquiring an interest in the home or carrying out repairs or improvements to the home.

27. Any capital which by virtue of paragraph 55 or 81 (capital treated as income: persons who are not pensioners, treatment of student loans) is to be treated as income.

28. Where any payment of capital is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.

29.—
(1) Any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund.

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—
(a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;
(b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
(c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering
or who suffered from haemophilia or who is or was a qualifying person which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—  
(a) the person who is suffering from haemophilia or who is a qualifying person;  
(b) any child who is a member of that person’s family or who was such a member and who is a member of the applicant’s family; or  
(c) any young person who is a member of that person’s family or who was such a member and who is a member of the applicant’s family.

(4) Sub-paragraph (3) does not apply if—  
(a) the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced, or  
(b) where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death.

(5) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—  
(a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person’s family; and  
(b) the payment is made either—  
(i) to that person’s parent or step-parent; or  
(ii) where that person at the date of the payment is a child, a young person or a student who has not completed his full-time education and has no parent or step-parent, to his guardian, 
but only for a period from the date of the payment until the end of two years from that person’s death.

(6) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where—  
(a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child or young person who was or had been a member of his family; and  
(b) the payment is made either—  
(i) to that person’s parent or step-parent; or  
(ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian, 
but only for a period of two years from the relevant date.

(7) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts.

(8) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts is to be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, and the London Bombings Relief Charitable Fund.

30.—  
(1) Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from, or dissolution of his civil partnership with, his former partner, that dwelling for a period of 26 weeks from the date on which he
ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

(2) In this paragraph “dwelling” includes any garage, garden and outbuildings, which were formerly occupied by the applicant as his home and any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated.

31. Any premises where the applicant is taking reasonable steps to dispose of those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.

32. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.

33. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.

34. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.

35. The value of the right to receive an occupational or personal pension.

36. The value of any funds held under a personal pension scheme.

37. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.

38. Any payment in kind made by a charity or under or by the Trusts, the Fund, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).

39. Any payment made pursuant to section 2 of the Employment and Training Act 1973 or section 2 of the Enterprise and New Towns (Scotland) Act 1990, but only for the period of 52 weeks beginning on the date of receipt of the payment.

40. Any payment in consequence of a reduction of council tax under section 13 of the 1992 Act (reduction of liability for council tax), but only for a period of 52 weeks from the date of the receipt of the payment.

41. Any grant made in accordance with a scheme made under section 129 of the Housing Act 1988 or section 66 of the Housing (Scotland) Act 1988 (schemes for payments to assist local housing authority and local authority tenants to obtain other accommodation) which is to be used—
(a) to purchase premises intended for occupation as his home; or
(b) to carry out repairs or alterations which are required to render premises fit for occupation as his home,
for a period of 26 weeks from the date on which he received such a grant or such longer period as is reasonable in the circumstances to enable the purchase, repairs or alterations to be completed and the applicant to commence occupation of those premises as his home.
42. Any arrears of supplementary pension which is disregarded under paragraph 54 of Schedule 8 (sums to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 55 or 56 of that Schedule, but only for a period of 52 weeks from the date of receipt of the arrears.

43.—
(1) Any payment or repayment made—
(a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);
(b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);
(c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies),

but only for a period of 52 weeks from the date of receipt of the payment or repayment.

(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers which is analogous to a payment or repayment mentioned in sub-paragraph (1), but only for a period of 52 weeks from the date of receipt of the payment or repayment.

44. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins), but only for a period of 52 weeks from the date of receipt of the payment.

45. Any payment made under Part 8A of the SSCBA (entitlement to health in pregnancy grant).

46. Any payment made either by the Secretary of State for Justice or by Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody, but only for a period of 52 weeks from the date of the receipt of the payment.

47. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.

48. Any payment made by a local authority under section 3 of the Disabled Persons (Employment) Act 1958. to homeworkers assisted under the Blind Homeworkers’ Scheme.

49.—
(1) Where an applicant falls within class C (alternative maximum council tax support) and is a lone parent with a child under 5 years of age, the whole of his capital.

50.—
(1) Any sum of capital to which sub-paragraph (2) applies and—
(a) which is administered on behalf of a person by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998 or by the Court of Protection;
(b) which can only be disposed of by order or direction of any such court; or
(c) where the person concerned is under the age of 18, which can only be disposed of by order or direction prior to that person attaining age 18.

(2) This sub-paragraph applies to a sum of capital which is derived from—
(a) an award of damages for a personal injury to that person; or
(b) compensation for the death of one or both parents where the person concerned is under the age of 18.

51.
Any sum of capital administered on behalf of a person in accordance with an order made under section 13 of the Children (Scotland) Act 1995, or under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules, where such sum derives from—
(a) award of damages for a personal injury to that person; or
(b) compensation for the death of one or both parents where the person concerned is under the age of 18.

52.
Any payment to the applicant as holder of the Victoria Cross or George Cross.

53.
In the case of a person who is receiving, or who has received, assistance under the self-employment route, any sum of capital which is acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is or was received but only for a period of 52 weeks from the date on which that sum was acquired.

54.—
(1) Any payment of a sports award for a period of 26 weeks from the date of receipt of that payment except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).

(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.

(3) For the purposes of sub-paragraph (2) “food” does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.

55.—
(1) Any payment—
(a) by way of an education maintenance allowance made pursuant to—
(i) regulations made under section 518 of the Education Act 1996;
(ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980;
(iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;
(b) corresponding to such an education maintenance allowance, made pursuant to—
(i) section 14 or section 181 of the Education Act 2002 [power of Secretary of State and the Welsh Ministers to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training]; or
(ii) regulations made under section 181 of that Act; or
(c) in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.

(2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to—
(a) regulations made under section 518 of the Education Act 1996;
(b) regulations made under section 49 of the Education (Scotland) Act 1980; or
(c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992,
in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any
provision specified in sub-paragraph (1).

56. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise, but only for the period of 52 weeks from the date of receipt of the payment.

57. Any arrears of subsistence allowance paid as a lump sum but only for the period of 52 weeks from the date of receipt of the payment.

58. Where an ex-gratia payment of £10,000 has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or internment of—
  (a) the applicant;
  (b) the applicant's partner;
  (c) the applicant's deceased spouse or deceased civil partner; or
  (d) the applicant's partner's deceased spouse or deceased civil partner,

by the Japanese during the Second World War, £10,000.

59.—

(1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or a member of an applicant’s family who is—
  (a) a diagnosed person;
  (b) the diagnosed person’s partner or the person who was the diagnosed person’s partner at the date of the diagnosed person’s death;
  (c) a parent of a diagnosed person, a person acting in place of the diagnosed person’s parents or a person who was so acting at the date of the diagnosed person’s death; or
  (d) a member of the diagnosed person’s family (other than his partner) or a person who was a member of the diagnosed person’s family (other than his partner) at the date of the diagnosed person’s death.

(2) Where a trust payment is made to—
  (a) a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;
  (b) a person referred to in sub-paragraph (1)(c), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending two years after that date;
  (c) a person referred to in sub-paragraph (1)(d), that sub-paragraph applies for the period beginning on the date on which the trust payment is made and ending—
    (i) two years after that date; or
    (ii) on the day before the day on which that person—
      (aa) ceases receiving full-time education; or
      (bb) attains the age of 20,
  whichever is the latest.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or a member of an applicant’s family who is—
  (a) the diagnosed person’s partner or the person who was the diagnosed person’s partner at the date of the diagnosed person’s death;
  (b) a parent of a diagnosed person, a person acting in place of the diagnosed person’s parents or a person who was so acting at the date of the diagnosed person’s death; or
  (c) a member of the diagnosed person’s family (other than his partner) or a person who was a member of the diagnosed person’s family (other than his partner) at the date
of the diagnosed person’s death,
but only to the extent that such payments do not exceed the total amount of any trust payments made to that person.

(4) Where a payment as referred to in sub-paragraph (3) is made to—
(a) a person referred to in sub-paragraph (3)(a), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending on the date on which that person dies;
(b) a person referred to in sub-paragraph (3)(b), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending two years after that date; or
(c) person referred to in sub-paragraph (3)(c), that sub-paragraph applies for the period beginning on the date on which that payment is made and ending—
(i) two years after that date; or
(ii) on the day before the day on which that person—
(aa) ceases receiving full-time education; or
(bb) attains the age of 20,
whichever is the latest.

(5) In this paragraph, a reference to a person—
(a) being the diagnosed person’s partner;
(b) being a member of a diagnosed person’s family;
(c) acting in place of the diagnosed person’s parents,
at the date of the diagnosed person’s death includes a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home, an Abbeyfield Home or an independent hospital on that date.

(6) In this paragraph—
“diagnosed person” means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeld-Jakob disease;
“relevant trust” means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeld-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;
“trust payment” means a payment under a relevant trust.

60.
The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant’s partner, the applicant’s deceased spouse or deceased civil partner or the applicant’s partner’s deceased spouse or deceased civil partner—
(a) was a slave labourer or a forced labourer;
(b) had suffered property loss or had suffered personal injury; or
(c) was a parent of a child who had died,
during the Second World War.

61.—
(1) Any payment made by a local authority, or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.

(2) For the purposes of sub-paragraph (1) “local authority” includes in England a county council.

62.
Any payment made under regulations made under section 57 of the Health and Social Care Act 2001 or under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care).
63. Any payment made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.

64. Any payment made to the applicant in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services).
Schedule 11
Additional discretionary payments due to exceptional and/or extreme hardship
Discretionary hardship payments
1. (1) The council may make discretionary payments by way of financial assistance to persons who—
   (a) appear to such an authority to require some further financial assistance in order to meet council tax liability.
   (2) The council has discretion—
   (a) as to whether or not to make discretionary hardship payments in a particular case; and
   (b) as to the amount of the payments and the period for, or in respect of which, they are made.

Circumstances in which discretionary hardship payments may be made
2. For the purposes of the Council Tax Support Scheme, the prescribed circumstance in which exceptional hardship payments may be made is where a person has made a claim for a discretionary hardship payment on an approved form, signed by the liable person.

Limit on the amount of the discretionary hardship payment that may be made
3. The amount of a discretionary hardship payment (if calculated as a weekly sum) shall not exceed, an amount equal to the weekly amount of council tax liability of that person calculated on a weekly basis.

Period for which discretionary hardship payments may be made
4. The Council shall restrict the period for which discretionary hardship payments may be made to such period as it considers appropriate in the particular circumstances of a case.

Form, manner and procedure for claims
5.—(1) A claim for discretionary hardship payment must be:
   (a) in writing or, in such form and manner as is accepted;
   (b) from—
      (i) the person who is liable to pay council tax for the property, or
      (ii) where it appears reasonable in the circumstances of a particular case, a person authorised to act on behalf of a person so liable.
   (2) an award of entitlement to discretionary hardship will be paid directly to the Council Tax account of the person entitled to the payment.
   (3) The council shall give a person who has claimed discretionary hardship payments or who has requested a review of a decision made in respect of his claim, written notice of its decision in respect of that claim or review and the reasons for that decision as soon as is reasonably practicable.

Provision of information
6. A person claiming or receiving discretionary hardship payments shall provide the council with the following information—
   (a) particulars of the grounds of claim or, as the case may be, particulars of the grounds for a review;
   (b) changes in circumstances which may be relevant to the continuance of discretionary payments, and such other information as may be specified by the council within such time as the council thinks appropriate.

Reviews
7.—(1) The council may review any decision it has made with respect to the making, cancellation or recovery of discretionary hardship payments in such circumstances as it thinks fit.
   (2) Without prejudice to the generality of paragraph (1) above, the council may, on any such review, cancel the making of further such payments and recover a payment already made where that authority has determined that—
      (a) whether fraudulently or otherwise, any person has misrepresented, or failed to disclose, a material fact and, as a consequence of that misrepresentation or failure to disclose, a payment has been made; or
      (b) an error has been made when determining the application for a payment, and as a consequence of that error, a payment had been made which would not have been made but for that error.

182
Schedule 12
Enhanced Temporary Support
Enhanced Temporary Support

1. For the first 13 weeks of an award, the council will pay full council tax support to the applicant’s council tax account, where the following paragraphs are satisfied:

   (a) The applicant has received no council tax support or council tax reduction under S13A of the Local Government Finance Act 1992 from this or any other council within the immediate 52 weeks previous to this application, and
   (b) The applicant or the applicant’s partner has been in remunerative work for a period of at least 52 weeks prior to the making of this application.

2. The applicant may be asked to provide evidence as is reasonable to prove that the conditions in paragraphs 1(a) and (b) above are satisfied.
Adoption of the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland part of the Norwich Policy Area Local Plan

Planning Policy Manager

The report by an independent Inspector, David Vickery, into the soundness and legal compliance of the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland part of the Norwich Policy Area Local Plan (the part JCS) has been received (see Appendix 1).

The report concludes that, subject to modifications recommended by the Inspector being incorporated into the plan, the part JCS strategy is sound and can be adopted as part of the already adopted wider Joint Core Strategy for Broadland, Norwich and South Norfolk (JCS).

This report summarises the Inspector’s conclusions and recommends that Council resolves to adopt the plan and the changes to the existing JCS proposed for adoption.

Appendix 2 contains the Schedule of adopted content of the part JCS. This includes the Inspector’s modifications. It is the text this report recommends for adoption, to be inserted into the adopted JCS.

<table>
<thead>
<tr>
<th>Cabinet member(s):</th>
<th>Ward(s) affected:</th>
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<tbody>
<tr>
<td>John Fuller</td>
<td>All</td>
</tr>
</tbody>
</table>

Contact Officer, telephone number, and e-mail: Adam Nicholls 01508 533809 anicholls@s-norfolk.gov.uk

1 Background

1.1 The Joint Core Strategy for Broadland, Norwich and South Norfolk (the JCS) was adopted by the three councils in March 2011. Following its adoption the JCS was subject to legal challenge on a number of grounds by Mr Stephen Heard of Stop Norwich Urbanisation (SNUB). Most of the grounds for challenge failed. However one challenge, which related to how reasonable alternatives for the major growth proposed in the Broadland part of the Norwich Policy Area (NPA) had been reported, succeeded at the High Court in 2012.

1.2 As a result of this judgment the court ordered that parts of the JCS should be remitted and not be treated as adopted. The remitted parts of the JCS related to certain major growth proposals in the Broadland part of the NPA, specifically the proposals for at least 7,000 homes (rising to 10,000 after 2026) and 25 hectares of employment land in the Old Catton, Sprowston, Rackheath and Thorpe St. Andrew growth triangle, also known as the North East Growth Triangle (NEGT). The
remittal also covered 2,000 further homes which formed a “floating allowance” in the Broadland part of the NPA.

1.3 The court order specified the text and diagrams to be remitted from the JCS and some consequential amendments to the Policies Map of Broadland District Council. The order made clear that the remitted elements were not to be treated as having been adopted but were to be considered as having been taken up to the Regulation 19 publication stage.

1.4 The court order also specified a process to be followed as a result of the judgment. In summary, this process involved the councils:

a. Preparing a sustainability appraisal (SA) of the remitted parts of the JCS, taking into account in particular the strategic growth in the NEGT and the reasonable alternatives, if any, to this;

b. Following consideration of the SA, publishing the relevant parts of the JCS and submission documents for consultation;

c. Following consideration of representations, either to submit the relevant parts of the JCS (including the SA and representations received on it) to the Secretary of State for Examination, or withdraw the remitted parts of the JCS; and

d. Following any Examination, to consider whether or not to adopt the relevant parts of the JCS in the light of the Inspector’s report and recommendations.

1.5 The court order created an unprecedented and unique situation whereby the JCS remained adopted in its entirety for Norwich, South Norfolk and the parts of Broadland outside the NPA, but remitted some of the elements that had been adopted in the Broadland NPA.

1.6 The process that has been followed since has been carried out in accordance with the court order.

1.7 Work commenced on the SA shortly following the publication of the court order in Spring 2012. This resulted in the identification and evaluation of the reasonable alternatives for growth, one of which was the previously remitted growth proposal.

1.8 Following consideration of the SA, it was decided that reasonable alternative 1, the previously remitted growth proposal, remained the most appropriate and should be published for consultation. The consultation ran for a total of 12 weeks from 10th August to 2nd November 2012.

1.9 Following consideration of the representations made on both the text proposed for inclusion in the JCS and the SA, the councils resolved to submit the plans for Examination.

2 Current Position and Issues

2.1 Submission of the JCS took place on 4th February 2013. David Vickery (Dip. T&CP, MRTPI) was the inspector appointed to examine the JCS. Examination hearings were held between 21st and 23rd May and on 24th and 25th July.
Consultation on suggested main modifications to the JCS took place between 9th September and 21st October 2013.

2.2 The Inspector’s report was received on 13th November 2013. The Inspector’s report concludes that with certain modifications the plan satisfies legal requirements and meets the criteria for soundness in the National Planning Policy Framework. The three councils must now consider whether or not to adopt the JCS in the light of the Inspector’s report and recommendations, in accordance with the court order.

The Inspector’s Report

2.3 The Inspector’s report, with the exception of the schedule of Main Modifications, is attached as Appendix 1. The schedule of Main Modifications has been incorporated into the proposed schedule of content to be adopted attached as Appendix 2. The report deals with legal compliance, soundness and other issues as summarised below.

Legal compliance

2.4 The Inspector’s report concludes that the plan meets all legal requirements. Specifically, the report states that:

- The councils have complied with the duty to co-operate with neighbouring local authorities and statutory consultees;

- The public consultation requirements for the plan were “fully and properly carried out. The plan complied with all UK legislation in this regard.” Further to this, the Inspector states “the GNDP made a commendable effort to explain a complex matter in a short format to all relevant interested parties, particularly to members of the public”.

- The sustainability appraisal (SA), with its addendum, has been properly and correctly carried out. The Inspector supported the approach taken in the SA for identifying three “reasonable alternatives” for the location of 7,000 dwellings and 25 hectares of employment land. The report states the SA carried out this difficult task “rigorously, logically and clearly” and provides “clear reasons” why the north-east was chosen as the most appropriate location for the growth. The Inspector concluded that as the Northern Distributor Road (NDR) is an adopted scheme, it is essential to take account of it in assessing the best location for growth. The Inspector did not consider that other locations proposed by objectors for this growth, such as Acle and the south-west, including Wymondham, were supported by evidence that they could be delivered and thus were not “reasonable alternatives”. The Inspector supported the view presented in the SA that school capacity, landscape setting and historical character issues constrained additional growth in the south-west. The issue of properly assessing greenhouse gas emissions in selecting the most appropriate location for the growth was considered at the Examination. The Inspector concluded that the addendum to the SA produced to address this issue clearly shows how the three alternative growth locations perform and why the north-east is the best choice in relation to greenhouse gas emissions. Importantly, the Inspector concluded that the SA rectifies the deficiencies identified in the 2012 Court Judgment and complies with the Court Order.
Soundness

2.5 The Inspector identified three main “soundness” issues to be investigated at the Examination and concludes:

- If the modifications he recommends are made, the housing numbers, locations and trajectory are sound. There was considerable debate on the issue of overall housing numbers at the Examination, with some arguing for lower numbers and some for higher. The Inspector concludes that adopted JCS total does not need to be changed as it “lies comfortably within a range of various projections” and accepted the GNDP view that a future review of the adopted JCS would be appropriate if monitoring showed a problem in relation to this issue. The modifications include a flexibility policy requiring a focussed Local Plan to allocate additional housing land in the NPA in the event of under delivery of housing over the next two years (policy 22 in the Inspector’s report). The Inspector draws the important planning conclusion that there has not been “persistent under delivery” of housing in the NPA and that a 5% land supply buffer, rather than one of 20%, is appropriate for the area. The inspector also concludes that the development proposed will be viable and that there is a high probability that key infrastructure, including the NDR and Postwick Hub, will be implemented.

- The allocation of 25 hectares of employment land made in the part JCS is reasonable;

- Modifications should be made to enable effective monitoring of the plan.

Other Issues

2.6 The Inspector also concludes that issues raised at the examination concerning flooding and water had not been backed by evidence and there are no reasons why the plan would cause any of the alleged problems. In relation to traffic in Wroxham and Hoveton, the Inspector concludes that there was no evidence that the plan would create a danger to highway safety or significantly interrupt the free flow of traffic.

Consequences of the Inspector’s Report

2.7 The publication of the Inspector’s report enables the councils to proceed to adoption of the part JCS. However, they can only do so provided that they incorporate the modifications that the Inspector views as necessary to make the plan sound. Although all the modifications proposed by the Inspector relate to the remitted proposals, it should be noted that they require both new text to be included in the plan that was not submitted by the councils and some degree of change to parts of the plan previously adopted and not remitted.

2.8 The modifications have all been subject to consultation. Almost all of them were proposed by the councils at the Examination. They are summarised as follows:

- Clarification of the amount of development that can be permitted before the NDR is constructed and/or without the improvements planned for the Postwick Hub junction;

- Including the national “model” policy confirming the presumption in favour of sustainable development;
- Including a new flexibility policy to ensure the delivery of housing land in the Broadland part of the Norwich Policy Area in the event of a significant shortfall;
- Revising the Appendix 6 Housing Trajectory to accord with up-to-date figures and to explain how the tables and charts should be read;
- Updating and clarification of the Appendix 7 Implementation Framework, adding a separate section for the infrastructure required for this Plan; and
- Additional indicators for the Appendix 8 Monitoring Framework to ensure that it is effective.

2.9 The modification that was not proposed by the councils is the inclusion of policy 22 (see pages 48 and 49 in Appendix 2). The policy requires that if there is a significant shortfall of housing supply affecting the Broadland part of the NPA shown in monitoring reports produced two years following adoption, the councils will produce a focussed Local Plan identifying appropriate sites in the whole of the NPA to remedy the shortfall.

2.10 In its consultation representations on the draft version of policy 22 the councils suggested that the soundness of the policy would be enhanced by:
- Changing the period before the policy could be triggered to three years to encourage investment in the implementation of the JCS;
- Increased clarity with respect to the trigger point; and
- Including reference to the housing land supply over the entire NPA being relevant to the scale of the shortfall to be addressed in any review.

2.11 Only very limited amendment was made between the versions of policy 22 consulted on and those included in the final Inspector’s report. The Inspector did not make any significant change to reflect the councils’ concerns, although to some extent further helpful explanation is provided in the body of his report.

3 Proposal and Reasons

3.1 Notwithstanding the outstanding concerns over the content of policy 22, it is considered that the case for South Norfolk Council (and Broadland DC and Norwich CC) to adopt the JCS is overwhelming. The councils’ strategy for the distribution of growth over the NPA has been endorsed. The major growth in the Broadland part of the NPA fits into a coherent strategy which if implemented should ensure that housing needs are addressed, economic development is promoted, the environment is protected and infrastructure investment is well coordinated with growth.

3.2 Adoption of the part JCS involves the publication of an Adoption Statement, accompanied by the full JCS, the part JCS as amended by the Inspector’s modifications, the Inspector’s report, the Sustainability Appraisal, the Habitats Regulation Assessment and an Environmental Statement. These documents will be made available for inspection at deposit points and on the web for the duration of the formal six-week legal challenge period: any person who is aggrieved by the adoption of the part JCS may make an application to the High Court on the grounds that the document is not within the appropriate power and/or a procedural requirement has not been complied with.

3.3 Once the risk of legal challenge has passed, the production of the final document to publication standard can be undertaken.
4 Other Options

4.1 Council could decide not to adopt the part JCS. However, there could potentially be some very serious negative impacts associated with not adopting the plan. This would include creating considerable confusion about appropriate growth locations and the status of the remaining (already adopted) parts of the JCS. The uncertainty created by not having an adopted strategy would increase the prospect of speculative and/or inappropriate proposals being submitted, resulting in an increase in “planning by appeal”.

5 Relevant Corporate Priorities

5.1 Enhancing our quality of life and the environment we live in – the adoption of the part JCS will give the best opportunity to secure growth which respects the environmental and quality of life.

5.2 Promoting a thriving local economy – the policies in the JCS are vital in securing the appropriate balance and location of jobs and houses to promoting sustainable economic growth in South Norfolk.

5.3 Supporting communities to realise their potential – the adoption of the part-JCS will give South Norfolk and its local communities greater certainty as to the scale and location of planned future development in South Norfolk.

6 Implications and Risks

6.1 Financial – the costs of preparing, submitting, examination and adopting the part JCS are shared by the three districts and Norfolk County Council. The further costs of adopting the JCS are included within existing budgets.

6.2 Legal – adoption of a Local Plan Document (in this case, the part JCS) must be made by Full Council. In order for the adoption of the part JCS to take place, the three local authorities (South Norfolk, Broadland and Norwich) must all resolve to adopt the document.

6.3 As noted in paragraph 3.2 above, there is a formal six-week period after the adoption of a Local Plan Document (in this case, the part JCS) within which an aggrieved person may lodge a legal challenge to the adoption under Section 113 of the Planning and Compulsory Purchase Act 2004.

6.4 Risks – as noted in paragraph 4.1 above, not adopting the part JCS would risk generating considerable confusion about the status of the adopted parts of the JCS, the location of appropriate growth locations and would increase the probability of speculative and/or inappropriate planning applications being submitted, resulting in an increase in “planning by appeal”.

7 Conclusion

7.1 Overall, the Inspector’s report is very positive. It provides the opportunity to finally adopt a full evidence based strategy to guide the sustainable growth of the area, providing the planning framework to guide delivery of the housing and jobs needed. However, the Inspector is clear that the part JCS can only be adopted if the recommended modifications are made. It is therefore recommended that
Council should resolve to adopt the JCS with the modifications proposed by the Inspector (set out in Appendix 2 of this report).

8 Recommendations

8.1 Council is recommended to:

- note the Inspector’s report (Appendix 1 to this report) including the required changes;

- resolve to adopt the part Joint Core Strategy and changes to the existing Joint Core Strategy (as set out in Appendix 2 to this report); and

- delegate authority to the Director of Growth and Localism to proceed with the necessary legal and administrative process to secure adoption of the revised JCS so that it becomes part of the development plan for South Norfolk Council, subject to Broadland District Council and Norwich City Council also resolving to adopt.

Appendix 1: Report on the Examination into the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland part of the Norwich Policy Area Local Plan (13th November 2013)

Appendix 2: Joint Core Strategy for Broadland, Norwich and South Norfolk: the Broadland part of the Norwich Policy Area: Schedule of proposed content for adoption
Report to Broadland District Council, Norwich City Council and South Norfolk District Council

by David Vickery DipT&CP MRTPI

an Inspector appointed by the Secretary of State for Communities and Local Government

Date: 13th November 2013

PLANNING AND COMPULSORY PURCHASE ACT 2004 (AS AMENDED)

SECTION 20

REPORT ON THE EXAMINATION INTO THE JOINT CORE STRATEGY FOR BROADLAND, NORWICH AND SOUTH NORFOLK, THE BROADLAND PART OF THE NORWICH POLICY AREA LOCAL PLAN

Document submitted for examination on 4 February 2013

Examination hearings held between 21 to 23 May, and on 24 & 25 July 2013

File Ref: PINS/G2625/429/7
## Abbreviations Used in this Report

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>Framework</td>
<td>National Planning Policy Framework</td>
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<tr>
<td>GNDP</td>
<td>Greater Norwich Development Partnership, which includes Broadland District Council, Norwich City Council and South Norfolk District Council (the three councils with responsibility for this Plan)</td>
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<tr>
<td>JCS</td>
<td>Joint Core Strategy</td>
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<td>LDS</td>
<td>Local Development Scheme</td>
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<td>LIPP</td>
<td>Local Investment Plan and Programme</td>
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<td>LPA</td>
<td>Local Planning Authority</td>
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<td>LP</td>
<td>Local Plan</td>
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<td>MM</td>
<td>Main Modification</td>
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<tr>
<td>NDR</td>
<td>Northern Distributor Road</td>
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<td>NEGT</td>
<td>North East Growth Triangle</td>
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<tr>
<td>NPA</td>
<td>Norwich Policy Area</td>
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<tr>
<td>PUD</td>
<td>Persistent Under Delivery</td>
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<td>SA</td>
<td>Sustainability Appraisal</td>
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<td>SCI</td>
<td>Statement of Community Involvement</td>
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<td>SCS</td>
<td>Sustainable Community Strategy</td>
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<td>SHMA</td>
<td>Strategic Housing Market Assessment</td>
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Non-Technical Summary

This report concludes that the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland Part of the Norwich Policy Area Local Plan provides an appropriate basis for the planning of the area up to 2026, providing a number of modifications are made to it. The Councils have specifically requested that I recommend any modifications necessary to enable them to adopt the Plan. Almost all of the modifications were proposed by the Councils, except for new Policy 22 (MM2) which ensures the delivery of housing land if there is a later significant shortfall. I have recommended the modifications after full consideration of all the representations from interested persons on the relevant matters.

The Main Modifications can be summarised as follows:

- Clarification of the amount of development that can be permitted before the Northern Distributor Road is constructed and/or without the improvements planned for the Postwick Hub junction;
- Including the national “model” policy confirming the presumption in favour of sustainable development;
- Including a new flexibility policy to ensure the delivery of housing land in the Broadland part of the Norwich Policy Area in the event of a significant shortfall;
- Revising the Appendix 6 Housing Trajectory to accord with up-to-date figures and to explain how the tables and charts should be read;
- Updating and clarification of the Appendix 7 Implementation Framework, adding a separate section for the infrastructure required for this Plan; and
- Additional indicators for the Appendix 8 Monitoring Framework to ensure that it is effective.
Introduction

1. This report contains my assessment of the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland Part of the Norwich Policy Area Local Plan in terms of Section 20(5) of the Planning & Compulsory Purchase Act 2004 (as amended). It considers first whether the Plan’s preparation has complied with the duty to co-operate, in recognition that there is no scope to remedy any failure in this regard. It then considers whether the Plan is sound and whether it is compliant with the legal requirements. The National Planning Policy Framework (paragraph 182) makes clear that to be sound a Local Plan should be positively prepared; justified; effective and consistent with national policy.

2. The starting point for the Examination is the assumption that the three Councils have submitted what they consider to be a sound plan. The basis for my Examination is the submitted draft plan (February 2013) which is essentially the same as the document published for consultation in August 2012.

3. My report deals with the Main Modifications that are needed to make the Plan sound and legally compliant and they are identified in bold in the report (MM). In accordance with section 20(7C) of the 2004 Act the Councils requested that I should make any modifications needed to rectify matters that make the Plan unsound and not legally compliant and thus incapable of being adopted. These main modifications are set out in the Appendix.

4. The main modifications that go to soundness have been subject to public consultation and, as set out in my report, Sustainability Appraisal (SA). My report takes into account all of the views expressed on these matters and in this light I have made some amendments to the detailed wording of the Main Modifications where these are necessary for consistency or clarity. None of these amendments significantly alters the content of the modifications as published for consultation or undermines the participatory processes and sustainability appraisal that has been undertaken.

5. My approach to the Examination has been to work with the Greater Norwich Development Partnership (the GNDP) and all the other participants in a positive, pragmatic and proactive manner, with the aim of resolving any elements in the Plan which are not legally compliant or sound. In doing so, I have considered all the points made in the representations, statements and during the discussions at the hearing sessions. However, the purpose of this report is to assess the soundness and legal compliance of the Plan, giving reasons for my recommendations for the main modifications, rather than to respond to all the points made in the representations.

6. Additional modifications (minor changes) can be made by the Councils on adoption of the Plan. Taken together, these must not materially affect the policies that would be set out in the Plan if it was adopted with the main modifications.
7. Reference numbers for documents in the evidence base are provided within square brackets [ ] in the report.

**Preamble**

8. The Plan has been produced to address the Judgment and Court Order made by Mr Justice Ouseley in the High Court on 24 February 2012 and 25 April 2012 respectively in the case of Heard v Broadland District Council, South Norfolk District Council and Norwich City Council. He ordered that those parts of the Joint Core Strategy (the JCS), adopted in March 2011, involving the Broadland part of the Norwich Policy Area (the NPA), including the North East Growth Triangle (the NEGT) with a total of 9,000 proposed dwellings and 25 hectares of employment land, should be remitted for further consideration, and that a new Sustainability Appraisal (SA) for that part of Broadland in the NPA and the reasonable alternatives to it should be prepared. The Court Order stated that the remitted parts of the JCS should be treated as only having been taken up to the 2012 Local Planning Regulation 19 publication stage (previously known as the ‘pre-submission stage’), and as not having been examined or adopted.

9. Thus, the Plan is not a review of the adopted JCS or of any other Plan or proposal, such as the Northern Distributor Road (the NDR) or the Postwick Hub A47 interchange. It is a reconsideration only of those parts of the JCS which were remitted by the Judgment and Court Order, updated where necessary. For this reason, and the fact that my Examination is legally restricted to only those submitted policies and proposals in the Plan itself, I did not agree to requests from various participants to widen the scope of my Examination to other adopted or proposed policies and proposals.

10. The Plan is part of the strategic planning framework established for the Broadland, Norwich, and South Norfolk districts in the adopted JCS, and provides the strategic locations for the remaining required housing and employment up to 2026. It is not a ‘stand-alone’ Plan, but instead inserts text and diagrams into the adopted JCS. It is accompanied by an evidence base including technical reports and studies, topic statements, checklists, and a Sustainability Appraisal (SA). It forms part of a suite of development plans which are currently being prepared, including various site allocation plans and a Growth Triangle Area Action Plan in Broadland District.

**Assessment of Legal Compliance**

11. Three key areas concerning legal compliance are at issue in this Examination, and I deal with them below.

*Duty to Co-operate*

12. Section s20(5)(c) of the 2004 Act requires that I consider whether the Councils complied with any duty imposed on them by section 33A of the 2004 Act in relation to the Plan’s preparation. This requires the Councils to co-operate and engage constructively, actively and on an on-going basis with neighbouring planning authorities and other prescribed bodies when preparing development plan documents with regard to a strategic matter.
13. The GNDP has prepared a ‘Duty to Co-operate Statement’ [SDJCS 16] which summarises how the Councils have co-operated with other Local Planning Authorities (LPAs) and with the additional bodies prescribed in Regulation 4 of the 2012 Regulations. As I have said, the Plan consists of those parts of the adopted JCS which were remitted back – that is, those proposals which were sent back to the Regulation 19 publication stage. The adopted JCS predates the introduction of Section 110 of the Localism Act and so its proposals were not subject to the Section 33A duty to cooperate because the duty does not apply retrospectively.

14. The production of this Plan was undertaken by the GNDP, and this Partnership includes not only the three Councils named on the front cover of my report, but also Norfolk County Council, the Broads Authority, and statutory consultees. I was told [SDJCS 16] that the GNDP operates in an “environment of comprehensive and long term cooperation” between not only the members of the GNDP, but also with other authorities and statutory consultees. The Plan’s proposals have been a matter for discussion and debate at officer meetings of the Norfolk Strategic Planning Group, and at other meetings.

15. All surrounding LPAs to the GNDP (North Norfolk, Great Yarmouth, Waveney, Mid-Suffolk, Suffolk County, Breckland and King’s Lynn & West Norfolk) have been consulted on the Plan and, with the exception of Breckland, Suffolk and the Broads Authority, there have been no issues raised. Those latter three named LPAs have not raised any objections. Although the involvement with councils outside the GNDP has been mainly at officer level, councillors (particularly Leaders of Councils) have also had opportunities for positive and constructive engagement.

16. In relation to the relevant Regulation 4 bodies, all relevant bodies have been engaged - some in more detail than others, dependant on the extent of their involvement in the Plan’s infrastructure proposals.

17. In the above circumstances, I consider that during the preparation of the Plan the GNDP, including the three Councils, has engaged constructively, actively and on an ongoing basis on the Plan’s strategic matters by means of various processes which have maximised its effectiveness. Additionally, I bear in mind that the Plan’s remitted proposals were well publicised and debated over a number of years, not least during the 2010 public examination of the JCS proposals. I am also mindful that there has been no objection from neighbouring LPAs or Regulation 4 bodies concerning the overall level of development proposed. I therefore conclude that the Plan complies with the legal duty to co-operate in the Act.

**Public consultation**

18. This Plan is unique in the way it has had to be prepared because it was sent back by the Court Order to the ‘publication’ stage only, after which it was then submitted to the Secretary of State for examination. Therefore, there were no ‘issues and options’ or ‘draft proposals’ stages in its preparation upon which the public could be consulted. The Statements of Community Involvement (SCIs) concerning those earlier stages of plan preparation
consequently do not apply, and so there was no requirement for there to be any public meetings or exhibitions. The requirement was for the Plan to be open for representations for a period of 6 weeks, and this was done in accordance with the SCIs by public advertisements, individual notices and letters to stakeholders, and by making the documents available on the web, at council offices and in libraries [SDJCS 7]. I was also told that Broadland District Council published a news item about the Plan and the consultation in its newspaper, which was delivered to local residents.

19. In addition, I consider that the GNDP made a commendable effort to explain a complex matter in a short format to all relevant interested parties, particularly to members of the public. This was done by, firstly, publishing a short 6 page summary [SDJCS 2], with fuller details in its accompanying schedules and appendices. And, secondly, by a 12 page non-technical summary (with maps) of the SA process of re-examining reasonable alternatives [SDJCS 3.1], which was the key reason for the High Court’s remittance. For those interested in the Plan it would not have been very difficult to understand what had happened, what was proposed, and how the decisions had been taken.

20. Overall, I am satisfied that the public consultation requirements for this Plan were fully and properly carried out. The Plan complied with all UK legislation in this regard, and therefore it also complied with the relevant Articles in the Aarhus Convention (a consideration mentioned by one representor) because effective public participation was carried out.

Sustainability Appraisal

21. The GNDP reconsidered the SA as required by the Court Order, but some parties said that not of all the reasonable alternatives for major development areas had been examined. I consider later the evidence for housing numbers in my Issue 1 soundness assessment where I conclude that the Plan, and thus the SA, has correctly assessed the amount of housing needed. One of the early conclusions in the screening process was that a floating small sites allowance of 2,000 was appropriate for the Broadland part of the NPA, which left 7,000 new homes to be located elsewhere within the whole NPA. I agree.

22. Given the above, the SA looked at 11 potential growth locations at three different scales of strategic growth and 7 potential combinations of those locations in order to accommodate the 7,000 dwellings and 25 hectares of employment land over the plan period. Overall, I am satisfied that the SA established the proper strategic scope for the consideration of what might be possible reasonable alternatives.

23. Three growth locations were selected as being the reasonable alternatives that were to be tested through the full SA process. However, some representors queried whether the SA had examined all the reasonable alternatives that were possible, and a number of suggested sites were put forward which, in combinations, were said to be reasonable alternatives. However, I do not consider that any of them could be described as being reasonable alternatives. I explain immediately below why this is so for the
main alternative suggestions which were put to me in detail at the hearings but, for the avoidance of doubt, I agree with the GNDP's reasons as set out in SDJCS 7 for the unfavourable assessments of the other suggestions made by representors.

24. There was no convincing evidence that the combination of areas suggested by the Norwich and Norfolk Transport Action Group and the Green Party (partly within the Plan area and partly to the south-west of Norwich) would actually provide the required numbers of homes, or that in the south-west the development would not cause an unacceptable impact on the form and character of the existing settlements (which was the SA’s conclusion regarding major development here).

25. Landstock Estates Ltd (with others) suggested additional dwellings partly within the Plan area, partly in the Wymondham area, and partly in the Hethersett/Little Melton area (or alternatively as a floating allocation). It was accepted by them that this was only an example, or a demonstration, and that it was not a detailed, fully worked up alternative. It has similar problems as the alternative proposed by Norwich and Norfolk Transport Action Group and the Green Party – that is, there was no convincing evidence that the dwelling numbers proposed could in reality be provided, and no evidence that the potential unacceptable environmental impacts on the character and setting of the existing settlements to the south-west of Norwich could be avoided. In addition, all participants agreed that there would be a shortage of secondary school places in Wymondham, but there was no clear solution which would resolve that issue (mainly because of disagreements over the numbers of school places required), and the possibilities put forward for resolving the shortfall were not accepted by the Local Education Authority or the High School (which is an Academy).

26. The above points are sufficient on their own for me to conclude that all these alternatives are not reasonable ones. But in addition, they do not include provision for the NDR. The NDR is an adopted scheme of the County Council (the Highway Authority); it is a fundamental part of the Norwich Area Transportation Strategy, the Norwich Area Transportation Strategy Implementation Plan, and Norfolk’s Third Local Transport Plan; and it has been subject to SA/Strategic Environmental Assessment in these documents. The NDR also forms an integral part of the adopted JCS (e.g. in Policy 9) to which this Plan contributes. The NDR is consequently in the infrastructure baseline of this Plan’s SA, against which the environmental effects of any development alternatives have to be assessed. Thus the lack of provision for the NDR in these suggested alternatives adds weight to my unfavourable assessment of them.

27. Irrespective of any flooding concerns that might limit development, Acle does not lie within the NPA, which is where the adopted JCS says that any major growth should be located (Policy 9). As it does not comply with the policy locations in the adopted JCS for major growth areas it is not a reasonable alternative.

28. The above examples of development locations illustrate the difficulties faced by both the GNDP and representors in identifying reasonable alternatives to
assess in the SA. The requirements and objectives of the adopted JCS and the Plan, and the varied possible permutations of development locations make the task a difficult one. I consider that the SA has carried out that task rigorously, logically and clearly. The three reasonable alternatives selected were the only ones which might have the potential to meet all of these requirements, objectives and base parameters. The GNDP has given good and sound reasons for the selection of the reasonable alternatives and why other alternatives were not reasonable ones; it has carried out a fair and public analysis of those three selected reasonable alternatives (see below); and its constituent LPAs have given clear reasons for the final selection of the preferred option, Reasonable Alternative 1, for the Plan’s proposals.

29. One of the Plan’s environmental objectives, set out in the SA, is to “adapt to and mitigate against the impacts of climate change” (ENV 6). One of the key factors in this is greenhouse gas emission, of which vehicle carbon dioxide emissions form a significant part. The Green Party said that these had not been properly considered in the SA and produced its own vehicle carbon footprint assessment at the hearings.

30. The GNDP produced a hearing note [DV 45] which summarised how carbon emissions from vehicles had been dealt with in the SA. The GNDP accepted that it was not clear how the preference conclusions in the SA on the three alternatives had been reached from the evidence base, particularly as these aspects had been considered under both SA Objective ENV 1 (“reduce the effect of traffic on the environment”) and Objective ENV 6.

31. An Addendum to the SA was therefore produced which showed how the three chosen reasonable alternatives differ in their impacts on the environment through transport related greenhouse gas emissions. This was done by considering factors such as proximity to employment (by walking and cycling), proximity to services in Norwich City Centre, and proximity to potential high quality public transport routes (in particular Bus Rapid Transit). I consider these to be an equally robust method of assessing this factor as the spread sheet calculations suggested by the Green Party which were, by its own admission, fairly crude and which might provide a false sense of mathematical precision. Whilst it is possible to suggest other qualitative and quantitative ways [MOD17 & MOD18] in which such evidence can be dealt with, the Addendum deals with the matter of greenhouse gas emissions in a proportionate and satisfactory manner.

32. I am satisfied that the SA now clearly shows how the three reasonable alternatives perform in terms of greenhouse gas emissions, and that Reasonable Alternative 1 still remains the best one so far as this factor is concerned.

33. The Addendum to the SA also assesses a Main Modification (MM2), namely an additional Policy 22 to ensure the delivery of housing land (see later). It concludes that it would be less than ideal because growth could come forward in a more dispersed fashion and there could be more growth overall. However, this is outweighed by the key consideration of providing decent, suitable and affordable homes (SA objective SOC4) and the fact
that any additional allocations could well be limited in scale to that necessary to overcome short-term delivery issues.

34. Representors questioned whether the SA correctly assessed sustainability issues/objectives relating to water quality, air quality, environmental amenity (e.g. noise, vibration and visual intrusion), designated historic assets (e.g. Conservation Areas, Registered Historic Parks and Gardens and listed buildings) and access to key employment locations for the reasonable alternatives. The GNDP considered that its analysis of these issues was appropriate, but the SA Addendum now makes it absolutely clear how they were assessed.

35. Overall, I conclude that SA, with the Addendum, has been properly and correctly carried out. I consider that it rectifies the deficiencies identified in the 2012 Court Judgement and that it complies with the Court Order.

36. My examination of the compliance of the Plan with all the legal requirements is summarised in the table below. I conclude that the Plan meets them all.

<table>
<thead>
<tr>
<th>LEGAL REQUIREMENTS</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Development Schemes (LDSs)</td>
<td>The Plan is identified within the adopted LDSs of Broadland (2012 – 2015), Norwich (October 2012) and South Norfolk (January 2013) which set out an expected adoption date of August 2013. The Plan’s content and timing are compliant with these LDSs, although the hearing adjournment from May to July and the need to publish and consult on the main Modifications and SA Addendums have set back the expected adoption date, but this slippage is acceptable in the circumstances.</td>
</tr>
<tr>
<td>Statements of Community Involvement (SCIs) and relevant regulations</td>
<td>The SCIs were adopted in October 2008 (Broadland), January 2007 (Norwich) and February 2007 (South Norfolk). Consultation has complied with their requirements, including the consultation on the post-submission proposed Main Modifications.</td>
</tr>
<tr>
<td>Sustainability Appraisal (SA)</td>
<td>SA has been carried out and is adequate, as set out above.</td>
</tr>
<tr>
<td>Appropriate Assessment (AA)</td>
<td>The AA dated February 2010 applies to this Plan, having been carried out for the adopted JCS. This Task 2 AA concluded that it was highly unlikely that the then JCS policies (which included those in this Plan) would have a significant direct or indirect impact on European and Ramsar designated sites, subject to certain caveats. Since then some of those caveats have been included in the adopted JCS. It was reconsidered in July 2012 as part of this Plan’s preparation, and Anglian Water, the Environment Agency, Natural England and the Councils all agreed that it remained unchanged. I agree. The Water Resource Availability Study of June 2012 Addendum</td>
</tr>
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Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland Part of the Norwich Policy Area
Local Plan: Inspector’s Report November 2013

The AA has demonstrated that the existing licensed resources supplying the Greater Norwich area are sufficient to serve projected development beyond 2015. In addition, further work on the resolution of the longer term water resource requirement is progressing, and Anglian Water has put forward a number of potential solutions for the next Asset Management Plan covering the period 2015 to 2020, but the final solution will not be confirmed until it publishes its final Water Resources Management Plan in 2014. This is acceptable.

A similar assessment was carried out for the Main Modifications and came to similar conclusions – that is, they are highly unlikely to have a significant direct or indirect impact on European and Ramsar designated sites. Natural England agreed with this conclusion, and so do I.

<table>
<thead>
<tr>
<th>National Policy</th>
<th>The Plan complies with national policy except where indicated and modifications are recommended.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable Community Strategies (SCS)</td>
<td>Satisfactory regard has been paid to the SCSs of the GNDP constituent authorities, including that of the County Council.</td>
</tr>
<tr>
<td>2004 Act (as amended) and 2012 Regulations</td>
<td>The Plan complies with the Act and the Regulations.</td>
</tr>
</tbody>
</table>

Assessment of Soundness

37. Taking account of all the representations, written evidence and the discussions that took place at the examination hearings, I have identified three main issues upon which the soundness of the Plan depends.

**Issue 1 – Does the Plan make appropriate provision for the effective delivery of the overall amount and location of new housing required, having regard to national policy, and is it soundly based, fully justified and supported by an up-to-date, credible and robust evidence base?**

**Overall level and location of housing**

38. The adopted JCS requires 37,000 homes and 27,000 jobs to be delivered to 2026. The Court Order does not affect the total housing numbers or the distribution of housing and employment in the adopted JCS, other than that in the Broadland part of the NPA. At issue, therefore, is the housing originally identified in the adopted JCS for the Broadland part of the NPA (a total of 9,000 homes with a further 3,000 beyond the plan period) and associated employment (25 hectares).

39. The GNDP carried out an assessment of housing numbers to test whether the requirements of the adopted JCS were still valid [SDJCS 14 and 14.1], including the latest Government Household Interim Projections of April 2013.
This concluded that local evidence (including an update to the Strategic Housing Market Assessment calculations) showed that the adopted JCS housing provision still sat well within the latest regional and national population projections and a range of estimates of housing requirements. The GNDP also provided the latest (July 2013) update to the East of England Forecasting Model, an economic forecasting tool [DV 36] which produced figures at the lower end of the range.

This conclusion on housing numbers was challenged by various parties, some arguing for lower and some for higher numbers. However, I am not convinced that the adopted JCS figure is so wrong that the amounts of housing proposed in this Plan need to be reduced or increased. This is not an exact science, and population projections are just that – projections. The GNDP figures indicate that the adopted JCS total still lies comfortably within the range of various projections based on completion extrapolations, affordable housing requirements, and population and economic figures [Table 1 of SDJCS 14 and TP 13].

Windfall housing development is not included within the adopted JCS 37,000 homes total, and it cannot be included because no evidence was submitted to show that it will continue to be a reliable source of supply as required by paragraph 48 of the Framework. I accept that windfall development would make the housing total higher if it continues at current rates (Table 1 of SDJCS 14 estimated that it would result in 42,000 homes). I also accept that the adopted JCS housing total does not lie at the bottom end of the range of projections. However, housing targets are not a maximum number, and the Government’s policy in the Framework is to boost significantly the supply of housing (paragraph 47). Moreover, there is no evidence to indicate that there are good planning reasons to restrict the proposed housing numbers in the Plan area, even if windfall development is included.

It was alleged that there was a backlog or shortfall in the provision of housing numbers in the adopted JCS that had to be made up in this Plan. I have already referred above to the possibility of an increase in total numbers due to the fact that windfall development is not included - this introduces an important element of flexibility. In addition, the housing numbers in the adopted JCS are based upon, and slightly exceed, the now revoked May 2008 Regional Strategy totals which, with the previous Regional Planning Guidance for East Anglia of 2000, had taken account of housing backlogs during those plan periods. And the Strategic Housing Market Assessment (and its updates) included an allowance to meet the affordable housing backlog (although there are practical difficulties in achieving it) in the adopted JCS. I have seen no convincing evidence that there is any significant housing backlog or shortfall either now or in the adopted JCS that cannot be accommodated by this Plan.

The GNDP has had regard to a range of population projections, some of which are higher and some lower than the adopted JCS target. I do not consider that the submitted evidence shows that the housing numbers in this Plan, which is for only a part of the adopted JCS total, need to be decreased or increased. In any event, as the GNDP said in evidence, the
question of increasing or decreasing housing numbers in the adopted JCS for the whole NPA (and other areas) is a matter for a future review of that Plan if monitoring later reveals there to be a problem.

The viability of the proposed development areas

44. The GNDP prepared a paper which tested the financial viability of the proposed development in the Plan [DV 22], guided by paragraphs 173 to 177 of the Framework and the Harman Report of 2012 (Viability Testing Local Plans) [DV 14]. Infrastructure costs were based on the emerging Local Investment Plan and Programme (LIPP), the expected operation of the Community Infrastructure Levy, the various policy requirements in the adopted JCS, and the public funding of the NDR. The testing was carried out using a number of site typologies which represented a range of development sites that might come forward in the Plan contributing towards the delivery of the housing and employment development proposed.

45. I appreciate that there are limitations to this type of work, and that the results are very sensitive to factors such as sales values and affordable housing targets. Nevertheless, the work has been carried out following the Harman Report methodology and it represents robust evidence based on the best information presently available. So, despite accepted limitations, I am satisfied that this financial testing shows that the developments proposed will be viable for developers and that there is likely to be sufficient viability to incentivise willing landowners to make the sites available for development. There are no financial reasons to presently doubt the Plan’s deliverability.

Infrastructure delivery

46. The GNDP has engaged with infrastructure providers throughout the preparation of the Plan and it has refined the proposals accordingly, particularly in terms of delivery timelines. There are some housing and employment specific infrastructure requirements, but these are proportionate and should not hamper delivery. Appendix 7 in the adopted JCS lists the infrastructure needed to facilitate development, and the Plan inserts those items required for its proposals, primarily taken from the latest LIPP, and it includes matters such as costs, phasing, funding sources and delivery dates.

47. The LIPP is an evolving document and its latest version is therefore just a ‘snapshot’ in time of the likely requirements. The latest LIPP is different from the information in the submitted Plan, and other infrastructure needs have become clearer over time. Moreover, Appendix 7 as submitted is difficult to understand and to find in it the infrastructure requirements for the Plan’s proposals because they are intermingled and are not specifically identified. In order to be effective (by being up-to-date and clear), two modifications are necessary. Firstly, MM6 sets out a revised Appendix 7 which clarifies that it only applies to those adopted JCS proposals outside the Broadland part of the NPA, and which deletes the submitted infrastructure projects related to the Plan’s proposals. And, secondly, MM7 provides a new Appendix 7a to the Plan which separately (and thus clearly)
lists the infrastructure required for this Plan’s development, based on the most up-to-date information available.

48. The infrastructure listing in modified Appendix 7a is as comprehensive as present information can make it, sets out which parts of the proposed development would be affected, and is based on credible information provided by statutory undertakers and other involved stakeholders. I agree that funding details of schemes should be consistent in requiring developer “contributions”. It will no doubt change in the future, and the GNDP is committed to regularly updating the LIPP to accommodate those changes.

49. One of the key infrastructure provisions, and one of the key causes of uncertainty in the Plan, is the NDR with its associated Postwick Hub junction onto the A47. The GNDP told me that failure to deliver improvements to the Postwick Hub junction to the proposed timetable (i.e. side road orders to be confirmed by late 2013 and open by mid-2015) may start to impact on delivery by 2015/16. Failure to deliver the NDR to its proposed timetable (i.e. the consent process completed by early 2015, and open by spring 2017) may start to impact on delivery by 2017/18. I understand that there is some limited scope for flexibility to these timetables as a start to elements of the constrained development may be possible during the construction phases of the NDR and Postwick Hub, but the work has not yet been done to quantify the exact amount. The Secretary of State exercised his powers in August 2013 [DV 55] under section 35 of the Planning Act 2008 to direct that the NDR be treated as development for which development consent is required (i.e. it will be treated as a “nationally significant infrastructure project”), which was a pre-requisite of keeping to this timetable.

50. I was told that the finance was in place for the NDR and Postwick Hub by a combination of Government funding and ‘top-up’ funding underwritten by the County Council. The schemes are both at relatively advanced stages (see above, and Postwick Hub has planning permission), and both have been costed and designed to a high level of confidence. I am satisfied that there is a high probability that the schemes will be funded, and that they are likely to be implemented. It is apparent that every effort is being made to keep to the above timetable.

51. Much doubt was cast on these projects during the hearings, most of which was related to the need for schemes and/or to the possibilities of alternatives. But these are not matters for me to decide or to make a judgement upon in the context of this Examination, which is limited to the submitted Plan. As I have said, the NDR is already included in the Norwich Area Transportation Strategy, the Norwich Area Transportation Strategy Implementation Plan and Norfolk’s Third Local Transport Plan, where it has been subject to SA/Strategic Environmental Assessment – and it also forms an integral part of the adopted JCS. Such concerns and suggestions can only be resolved through the various statutory processes for both these schemes.

52. There was some confusion amongst participants at the hearings (and myself) concerning paragraph 7.16 and its table as to where, and what
 Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland Part of the Norwich Policy Area  
Local Plan: Inspector’s Report November 2013

amount of, development could be permitted before the NDR is constructed and/or without the improvements planned for the Postwick Hub junction. So the Plan would not be effective and would therefore be unsound because of this confusion. The GNDP suggested new text in MM1 to replace paragraph 7.18 and its table which makes the development amounts in these circumstances clear and the Plan sound.

53. I discuss later the Plan’s ability to respond to rapid changes as required by the Framework, such as the possible failure of, or delays in the implementation of, the NDR and Postwick Hub. Overall, I conclude that the infrastructure requirements have been adequately assessed and that, as at the date of my Examination, the Plan’s proposals can be delivered so far as the necessary infrastructure provision is concerned.

The Housing Trajectory and additional Framework ‘buffer’

54. The submitted Plan contained a Housing Trajectory in Appendix 6 which has not been fully updated from the adopted JCS for the Broadland part of the NPA. Consequently it is out-of-date and unrealistic in that it shows housing deliveries in the past which have not actually occurred, such as at Rackheath eco-community. During the Examination the GNDP provided a series of Statement of Common Grounds with various landowners and developers in the NEGT area; new evidence on permissions granted and resolutions to grant permission; the improving housing market in the area; the build out / delivery rate at Rackheath (up to 230 dwellings per year with delivery from 2017/18); the earlier delivery of the North of White House Farm site; and other additional units in the East Development area of the NEGT [DV 21, 23, 28, 35 & MOD4]. This is all credible evidence.

55. As a result, the GNDP suggested a modified Housing Trajectory (MM5) which, in summary, shows a slower rate of growth in the NEGT in the earlier part of the plan period and a faster rate in its latter part than that in the submitted version. I consider this to be a realistic Trajectory both in terms of likely economic recovery times and in rates of delivery. Associated modification MM3 makes clear that the existing Appendix 6 in the adopted JCS is out of date, and MM4 deletes growth locations and the now incorrect totals in the adopted JCS Appendix 6 Trajectory, referring users to the new Appendix 6a (MM5) for the housing proposals in this Plan.

56. Of relevance to the Housing Trajectory are the questions of the 5-year housing land supply (and thus whether there needs to be deliverable sites at the beginning of the plan period) and whether the LPAs have persistently under delivered (PUD) in terms of Framework paragraph 47, thereby requiring a 20% ‘buffer’ rather than a 5% ‘buffer’ of deliverable housing sites. The Plan forms an integral part of the adopted JCS and covers the Broadland part of the NPA as a continuation and fulfilment of the adopted JCS. Policy 9 and paragraph 5.22 of the adopted JCS indicates that the purpose of the housing growth planned in the adopted JCS is to ensure that growth needs arising from the Norwich urban area are addressed as close to it as possible, i.e. within the NPA. The table on page 43 shows the distribution of growth between the NPA and the remaining parts of Broadland and South Norfolk and Norwich (paragraph 5.22). Therefore I
consider that these two questions have to be considered over the geographical area of the NPA as a whole. None of the hearing participants dissented.

57. However, the GNDP argued that this was merely the first step of a sequential approach to housing land supply, and that the second (final) step would be to consider the supply over each of the individual LPAs’ area which include the NPA. The GNDP said that if that second step showed there was a 5-year land supply (plus ‘buffer’) then that would be acceptable even if there was none over the whole NPA. This second step was disputed by some representors.

58. Unfortunately, the adopted JCS, of which this Plan only forms a part, is unclear on this point. Whilst this is a joint Plan, there is no joint LPA (all of the constituent GNDP councils are still individual LPAs) and so the table accompanying paragraph 5.22 breaks down the total housing allocations into numbers for each of the three LPAs for implementation and monitoring purposes.

59. In support of this point the GNDP said that various submitted NPA planning appeals showed that Inspectors had considered the question of the 5-year housing land supply over both the whole NPA area and the individual LPA within which the particular appeal site was located. However, I do not see any of my colleagues saying in those appeals that this was the correct sequential methodology. Rather, they had merely dealt with the figures presented to them by the parties and, in nearly all cases, had concluded that whichever set of figures was used (the whole NPA or the individual LPA area) there was not a 5-year housing land supply.

60. Like my colleagues in those appeals, I do not think that I have to come to a decided view on the GNDP’s ‘sequential’ land supply assessment point in order to conclude on the Housing Trajectory’s soundness. This Plan is concerned only with the Broadland part of the NPA, and whether the NPA is considered as a whole, or just Broadland District, or just the Broadland part of the NPA, the GNDP’s own figures for these three areas show that there is not a 5-year housing land supply in any of them using the existing deliverable sites [Appendices 1, 3a and 5 of DV 21]. The latter two Broadland-only areas have worse land supply figures than that across the whole NPA. I was not presented with any other 5-year housing land supply figures which showed that there was a satisfactory supply if other factors (such as recent permissions or resolutions to grant) were taken into account. For completeness I say now that I give little weight to the GNDP’s ‘emerging sites’ housing land supply figures, and I set out the reasons for that conclusion later on in paragraph 68.

61. On PUD, the GNDP produced evidence which looked back over a reasonable time period (13 years) in order to give a fair, balanced and broad picture before the economic downturn (around 2007/8), since when general national economic factors have prevented the LPAs from delivering well. I consider that, for these reasons, this was the properly chosen time period for the PUD assessment.
62. Other alternative PUD calculations were based on backdating housing requirements in later adopted plans and then adding the backlog or shortfall to the housing requirement. I reject this approach on a number of grounds. Firstly, it is unreasonable and unfair to retrospectively apply housing targets in plans which were at the time only in draft and to which relatively little weight could be attached under national policy guidance. A plan can only come into legal affect as part of the statutory development plan on adoption. It is only on, and from, this date that it forms part of the development plan for the area. It is common practice for councils to backdate the plan period to reflect the base date for the plan and its evidence base (particularly the Strategic Housing Market Assessment), but this is only the statistical period on which the plan is founded. The LPAs at the time would have been heavily, and rightly, criticised for assessing yearly housing targets in their monitoring reports against those draft plan targets.

63. Secondly, those adopted plans included in their future housing targets for the adopted plan period an element of backlog for past under delivery. Therefore, to include that backlog again in PUD calculations would be to introduce the likelihood of double counting.

64. Therefore, I accept the GNDP’s evidence on this question as being the more reliable of those presented to me. It shows a cumulative over-delivery in all the years from 2000/01 to 2009/10, and only since then has there been under delivery ranging from 2.8% to 12.4%. In these circumstances, I agree with the GNDP that a PUD Framework buffer factor of 5% is appropriate (i.e. a 5.25 year housing land supply) as persistent under delivery has not been shown under normal economic circumstances.

65. As I have said, whatever way the figures are calculated there is not currently a 5.25-year housing land supply. It was suggested that planning permission is a pre-requisite for inclusion in the 5.25-year supply calculation, but I agree with the GNDP that it is not. There is no doubt that to be delivered a site must enjoy the benefit of planning permission. Footnote 11 of the Framework confirms that there could be circumstances when sites with planning permission may not be deliverable but, conversely, there may be sites without planning permission which are appropriate and available now and which could be delivered within 5 years.

66. There is not a preferred answer to how past shortfalls should be handled - the two most common ways put to me were the ‘Sedgefield’ and ‘Liverpool’ approaches. In this case I agree with the GNDP that the shortfall should be added to the housing delivery target over the plan period because the JCS was only adopted in 2011 and it deals with that particular problem over the plan period (i.e. the ‘Liverpool’ approach), and this Plan forms part of it.

67. The GNDP’s ‘existing’ figures in Appendix 1 of DV 21 would have to be revised downward as windfalls have been over-estimated [Appendix 1 of DV 35] and because the King Street (St Anne’s Wharf) site in Norwich is not deliverable [DV 49]. Bearing these points in mind, the GNDP said on the last day of the hearings that its figures in Appendix 1 of DV 21 would give an NPA land supply of around 4.4 years of the 5.25-year requirement. Representors said it would be less [Table 3.2 of DV 32]. So it does not
matter whether the backlog or shortfall should be added over 5 years, 5.25 years, or 6 years – the fact is that there is not an adequate housing land supply as required in the Framework.

68. The GNDP argued that some ‘emerging’ sites should be included which would increase the supply. However, I am not fully convinced that they are deliverable given that the plans allocating the sites have not yet been examined (some are at Preferred Options stage), and that for some sites there are unresolved objections (paragraph 216 of the Framework). I was not given enough information to enable me to give varying degrees of weight to the different sites as part of a potential deliverable supply. I therefore give the emerging sites supply figures little weight.

69. The Plan’s modified Housing Trajectory in MM5 takes into account the above factors and I recommend it to make the Plan sound. However, due to infrastructure constraints, it would only start to effectively deal with the problem of the housing land supply shortfall after two years from its anticipated adoption. Moreover, it is dependant on the various site allocation plans currently being prepared by the three district councils coming forward as planned [as Table 3 of DV 21] and on the infrastructure being provided in the Broadland part of the NPA, particularly the NDR and the Postwick Hub junction. There are doubts about the timing and deliverability of all of these, and so the Plan’s ability to respond to rapid change has to be considered. This is especially critical because there is not presently an adequate housing land supply.

Flexibility to adapt to rapid change

70. Paragraph 14 of the Framework requires plans to have sufficient flexibility to adapt to rapid change. As I have explained, the deliverability of critical infrastructure and the delivery of sites through Local Plans are not entirely certain and so the Plan has to address the consequences of a possible shortfall in the 5.25-year housing land supply, including possible contingency arrangements, in order to be sound. Unfortunately, the Plan’s only answer is for a review of the whole JCS if there is no possibility of the timely construction of the NDR (paragraph 7.18), which would be a lengthy and time consuming process. There is no provision for a quicker and less complex method of dealing with deliverability problems, particularly for less critical delays in infrastructure provision. A delay or failure in the Broadland part of the NPA would probably mean that alternative housing land would have to be provided elsewhere in the NPA, although any policy should not rule out other new sites in the Broadland part of the NPA [DV 33].

71. I was assured by the GNDP that the NDR and the critical infrastructure would proceed according to the stated timetable, and that the housing would be delivered as set out in the modified Housing Trajectory. Thus, the GNDP Councils have nothing to fear from a modestly framed flexibility policy because, as they told me, it is unlikely to ever have to be implemented in practice. Such a policy is only a safeguard to ensure an effective Plan should the worst case scenario occur.

72. But there is no doubt that a policy is needed – all parties accepted this
point. Delay has already occurred in delivery from that anticipated under the adopted 2011 JCS’s Housing Trajectory. And this Plan proposes a significant amount of housing within a small geographical area by a number of developers, much of which is dependant on major infrastructure works. I acknowledge that the Housing Trajectory shows the majority of delivery in the later period of the Plan, and I take this into account in setting the ‘triggers’ for the new policy. I also place great weight on the Government’s policy to boost significantly housing supply, and its requirements that LPAs should provide in plans, and demonstrate over the plan period, a continuous 5-year (plus buffer) housing land supply (Framework 47 & 49).

73. There were no ‘oven-ready’ large sites brought to my attention that were deliverable and so available to be written into the Plan as ‘reserve’ sites to ensure housing land supply in the event of a shortfall. This means that a new, focussed housing Local Plan would have to be prepared to find alternative housing sites (and any other associated development to serve the housing), and this might take two or more years. Therefore, critical to any flexible policy to deal with rapid change is the matter of the ‘triggers’ for when any such remedial action would have to be started.

74. I am not convinced for three main reasons that a new Local Plan needs to be started immediately, or even within a year [MOD10], in order to find alternative sites as some representors urged. Firstly, I consider that the LPAs have done a considerable amount of work in pursuing the NDR, Postwick Hub and other infrastructure requirements and in preparing various site allocation plans to the timetables submitted to the Examination. There is no indication yet that these are likely to significantly slip, and there is at least some inbuilt flexibility in the Plan for additional housing development if they do. Secondly, to start a new plan so quickly would divert scarce staff resources away from existing important work on the site allocation plans which are needed to ensure that development takes place on time.

75. Thirdly, it will take at least two years for the Plan to start to meet the 5.25-year housing land supply requirement [Appendices 1, 3a and 5 of DV 21 and MM1] as deliverable permissions cannot be released any quicker. Therefore, any work on a housing Local Plan should be delayed for that two year period in order to give that process time to come to fruition. After this, if annual monitoring reveals that the required housing land supply (plus the appropriate ‘buffer’) has not been achieved, then a Local Plan would need to be quickly prepared to find alternative housing sites in the NPA to cover the period until any delays (for whatever reason) have been resolved. The time it would take for preparation means that any new Local Plan cannot, as the GNDP suggested, wait for the shortfall to be shown “through three full years annual monitoring reports” [DV 17 & MOD4], or to wait for the major housing developments to be implemented [MOD4], because by then the shortfall could be very large and possibly beyond repair.

76. I do not believe that a series of specific triggers related to the delay of itemised infrastructure projects (e.g. the NDR) [DV 16 & MOD10] would be sufficiently rigorous because this would not be flexible enough to deal with all of the possible causes of shortfalls. For instance, delays might happen in
combination, or knock-on side effects may cause unanticipated delivery problems, or delays might occur in other infrastructure projects which might not have been detailed in the policy. What is important here is whether the housing land supply is not being maintained for any reason. I consider that a 10% under supply in the 5-year supply (plus appropriate buffer) in any relevant monitoring report would be a reasonable trigger level because of the need for quick action in the event of any shortfall, and because it was a percentage level generally accepted by hearing participants.

77. The calculation of housing land supply should be consistent with national policy (Framework 182) and so calculating it to fit the supply details set out in the modified Housing Trajectory would not be sound [MOD4]. Such details change over time, particularly the specifics of what is actually deliverable. Obviously, any housing Local Plan would need to ensure that it did not prejudice the delivery of planned strategic infrastructure, so it is not necessary to write it into the policy as the GNDP suggested [MOD4].

78. I therefore recommend MM2 and its new Policy 22 in order to make the Plan sound by being effective and consistent with national policy. I do not think it necessary to include the Plan’s employment allocation in the new Policy 22 as its provision is mainly dependant on the delivery of the housing allocations in Policy 9.

79. The Plan should make clear that it complies with the Framework’s presumption in favour of sustainable development, which would also assist in maintaining an adequate housing land supply. A new Policy 21 in MM2 follows the wording of the Inspectorate’s model policy and makes the Plan sound by making it consistent with national policy. Recommended MM2 main modification also contains some additional text to explain the reasons for the two new Policies 21 and 22.

Overall conclusion on Issue 1

80. Consequently, taking account of all the evidence, statements and submissions, and having examined all the relevant factors, I conclude that overall the housing totals and modified Housing Trajectory represent a realistic, balanced, deliverable, justified and soundly based set of figures which would meet the objectively assessed housing needs over the plan period. Moreover, MM1 and MM2, would render the Plan sound by making it effective and consistent with the requirements of national policy.

Issue 2 – Does the Plan make appropriate provision for employment land, and is this soundly based, effective, and consistent with national policy?

81. The Plan adds additional text to Policy 9 of the adopted JCS for the additional housing discussed above and also for around 25 hectares of new employment land at Rackheath to serve the local employment needs of this whole major growth location. The Rackheath Eco-Community proposal within the Plan area was identified by the Government in a supplement to Planning Guidance Planning Policy Statement 1: Eco-towns, and its 2009 Concept Statement included nearly 23 hectares of employment land in order
to achieve the required mixed use community with employment provision.

82. The justification for this amount was derived from a 2008 Employment Growth and Employment Sites and Premises Study, which has not been updated. The GNDP said that although the take-up of employment land has been slow, the 2012 East of England Forecasting Model [SDJCS 14.1] suggested even stronger job growth of 33,000 than that provided for in the adopted JCS of 27,000 jobs.

83. However, the 2013 East of England Forecasting Model [DV 36] shows a reduced jobs growth of around 20,200 over the plan period, below the level in the adopted JCS. I was told that this did not take account of major jobs growth in areas such as the Norwich Research Park via the Government’s City Deals programme for Greater Norwich (which aims to create economic growth and jobs), and overflow from off-shore related development from the Great Yarmouth and Lowestoft areas. I accept that the Model is only a ‘trend’ projection, and that this additional information shows that the economy is likely to grow more than the Model indicates. Therefore, I conclude that the evidence base for a 25 hectare employment land allocation is a reasonable one as a basis for further detailed work to be carried out in the Growth Triangle Area Action Plan. The employment land amount is thus a sound and effective strategic allocation which is consistent with Government policy.

Issue 3 – Are the arrangements for monitoring the policies of the Plan effective and soundly based, including the indicators, delivery mechanisms, timescales and targets/milestones used?

84. Appendix 8 of the Plan contains the Monitoring Framework, but it does not include the ‘suggested indicators’ in the SA’s Table 7.1 [SDJCS 3.2] or a monitoring indicator for Policy 22. These render the monitoring ineffective and unsound. The GNDP recognised this problem and submitted an amended monitoring Appendix 8 as a suggested change (MM8).

85. The revised monitoring Appendix 8 shows for each aspect of this Plan when, what and by whom a list of identified actions will take place to ensure effective delivery. This will enable transparent and effective monitoring. ‘SMART’ targets have been set having regard to the availability of data and available resources. This main modification is reasonable and appropriate, and I recommend it to secure soundness in terms of effectiveness.

Other issues

86. Concerns were raised about flooding, water supply and possible water contamination, but no evidence was submitted. GNDP’s evidence, however, was that these issues were capable of resolution (primarily in the detail of future proposals), and that there were no strategic reasons on these grounds why this Plan’s proposals would cause any of the alleged problems. I agree with the GNDP’s views and the similar views of its statutory consultees, particularly that of Anglian Water.

87. Local people were concerned about traffic through the village of Wroxham
on the A1151 Wroxham Road where it converges on the bridge between Wroxham and Hoveton, but no evidence was submitted to substantiate it, and nor did the Highway Authority object. The GNDP’s response was that the construction of the NDR, the focus of growth on Norwich, and the provision of services and facilities within the proposed housing areas would mean that growth in this location would not directly pressure the A1151. The outputs from the Norwich Area Transportation Strategy Model showed very low traffic increases over Wroxham Bridge. I accept that there will be some increase in outward commuting and in leisure trips to the Broads and the North Norfolk Coast, but there was no evidence that these would create a danger to highway safety or significantly interrupt the free flow of traffic along this road.

88. Other issues were raised in the representations and at the hearing sessions which do not go to the heart of the soundness of the Plan. In many cases, detailed “improvements” to the Plan were suggested. Having considered all the other points made in the representations and at the hearing sessions, I consider that there are no further main modifications needed to ensure that the Plan is sound in the terms of the Framework and associated guidance.

**Overall Conclusion and Recommendation**

89. The Plan has a number of deficiencies in relation to soundness and legal compliance for the reasons set out above which mean that I recommend non-adoption of it as submitted, in accordance with Section 20(7A) of the Act. These deficiencies have been explored in the assessment sections above.

90. The Councils have requested that I recommend main modifications to make the Plan sound and/or legally compliant and capable of adoption. I conclude that with the recommended main modifications set out in the Appendix the Joint Core Strategy for Broadland, Norwich and South Norfolk, the Broadland Part of the Norwich Policy Area Local Plan satisfies the requirements of Section 20(5) of the 2004 Act and meets the criteria for soundness in the National Planning Policy Framework.

*David Vickery*

Inspector

This report is accompanied by the Appendix containing the Main Modifications
Joint Core Strategy for Broadland, Norwich and South Norfolk: the Broadland part of the Norwich Policy Area

Schedule of Proposed Content to be Adopted

The schedule below details the content proposed to be adopted for the Broadland part of the Norwich Policy Area Local Plan. This includes both the content submitted by the Councils, minor modifications for accuracy, and the Main Modifications required by the Inspector to make the plan sound. The Inspector’s Main Modifications are referenced in the table below and set out in detail in Appendix 1 attached.

The page numbers and paragraph numbering below refer to the combined submission Plan with the Joint Core Strategy for Broadland, Norwich and South Norfolk [SDJCS 1], and do not take account of the deletion or addition of text. The content proposed to be adopted is shown as underlined text.

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<tr>
<th>Section of Joint Core Strategy</th>
<th>JCS page no.</th>
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<tbody>
<tr>
<td>01 Our Strategy – Para 2.14 under heading “The dilemmas”</td>
<td>P.10</td>
<td>[In assessing the evidence to help identify the most appropriate locations for growth outside of the urban area,] the area to the north east of the city [and the A11 corridor to the south west perform well. This allows] for a concentration of new [development to maximise the use of existing infrastructure…]</td>
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<tr>
<td>01 Our Strategy – Para 2.15 under heading “the dilemmas”</td>
<td>P.10</td>
<td>In the case of Broadland, the historical pattern of development lends itself to further expansion with new growth locations in the parishes of Old Catton, Sprowston and Thorpe St Andrew, and the development of a low carbon community focussing on Rackheath, given its existing employment opportunities and railway line. The growth in these locations relies on the implementation of NATS. [Implementation of NATS…]</td>
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<tr>
<td>01 Our Strategy – Para 2.16 under heading “the dilemmas”</td>
<td>P.10</td>
<td>By contrast, [the historic pattern of development in South Norfolk has focussed on its network of villages and market towns, such as Long Stratton and Wymondham, and has retained strategic green gaps between settlements.]</td>
</tr>
<tr>
<td>04 Spatial vision: third paragraph</td>
<td>Page 20</td>
<td>[Growth will be focussed on brownfield land in the Norwich urban area] and in a very large mixed use urban extension within the Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle (Appendix 5).</td>
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<td>04 Spatial vision:</td>
<td>Page</td>
<td>inspired by the proposed exemplar at Rackheath, [zero</td>
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<td>under the heading &quot;Climate change and sustainability&quot; 3rd bullet point</td>
<td>20</td>
<td>carbon development will be the standard to be achieved through advances and innovation in the design, construction and management of sustainable communities and new buildings which improve energy efficiency and use renewable energy.</td>
</tr>
<tr>
<td>04 Spatial vision: under the heading “Working and getting around” Second bullet point</td>
<td>Page 21</td>
<td>[investment at strategic and other employment locations will help create a stronger economy (including at Norwich city centre; Norwich Research Park, Hethel Engineering Centre,] Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle [Longwater, Wymondham and around Norwich International Airport).]</td>
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<tr>
<td>Key diagram – and under objective 3</td>
<td>Page 27</td>
<td>Add notation to the key diagram to show the area to the northeast of the urban area as one to which the terms &quot;strategic employment sites&quot; and &quot;major housing growth and associated facilities&quot; apply (see plan attached as Appendix 2)</td>
</tr>
<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: under “Housing with care”</td>
<td>Page 41</td>
<td>[Mixed tenure housing with care will be required as part of overall provision in highly accessible locations. In particular provision will be required in Norwich, and the major growth locations of] Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle, [Cringleford, Hethersett, Wymondham and Long Stratton, and at Aylsham, Acle and Wroxham.]</td>
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<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: Table following paragraph 5.25</td>
<td>Page 43</td>
<td>Minor modification for correction of Typographical error: Column 2 header to read 'Current Commitment 2008'</td>
</tr>
<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: Table following paragraph 5.25</td>
<td>Page 43</td>
<td>The figure of 9,000 for the ‘New Allocations to 2026’ in the Broadland (NPA) and the total of 11,099 recorded in the table for the ‘New Commitment to 2026’ in the Broadland (NPA).</td>
</tr>
<tr>
<td>06 Policies for Places: Introduction</td>
<td>Page 55</td>
<td>[Large-scale mixed-use developments in the Norwich Policy Area are provided…] in a major urban extension in the Old Catton, Sprowston, Rackheath, Thorpe St</td>
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<tr>
<td>paragraph 6.3</td>
<td></td>
<td>Andrew growth triangle, and …[at Cringleford, Easton/Costessey, Hethersett, Long Stratton and Wymondham.]</td>
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</table>
| 06 Policies for places, Policy 9 Strategy for growth in the Norwich Policy Area: 2nd & 8th bullet points | Page 56    | 2nd bullet point  
  • Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle: 7,000 dwellings by 2026 continuing to grow to around 10,000 dwellings eventually  
  8th bullet point  
  • Broadland smaller sites in the NPA: 2,000 dwellings |
| 06 Policies for places, Policy 9 Strategy for growth in the Norwich Policy Area: Final bullet point: | Page 57    | Final bullet point  
  • [new employment development to serve local needs of major growth locations] including around 25ha of new employment land at Rackheath |
| 06 Policies for places, Policy 9 Para 6.7 | Page 57    | Paragraph 6.7 to read  
  The Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle incorporates land at Rackheath promoted for an eco-community under the government’s eco-towns programme and development of the rest of the area will be expected to reflect similar high standards. |
| Para 6.12 4th bullet point | Page 58    | 4th bullet point  
  • Rackheath: around 25ha of new employment land for a range of employment uses to strengthen the employment role of this location and provide local opportunities for the new community in this area |
| Diagram after the end of the paragraph 6.12 – Relationship between strategic growth locations | Page 59    | Add notation to the diagram to include the area of the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’ as a location for both ‘Major housing growth and associated facilities’ and ‘Strategic employment locations’ (see plan attached as Appendix 3) |
| Section of Joint Core Strategy | JCS page no. | Text/diagram proposed to be adopted (underlined) [N.B. the words in square brackets are included for clarification purposes only] |
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<td>[N.B. the words in square brackets are included for clarification purposes only]</td>
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<td>health facilities. This may be provided by building on the proposed centre at Blue Boar Lane or by the creation of a second district centre elsewhere in the Growth Triangle. The development will also require new local centres</td>
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<td></td>
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<td>• new pre-school provision and up to six new primary schools plus a new secondary school with an initial phase to open as early as possible. To facilitate early provision the early phases of development will concentrate on family housing</td>
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<td>• new employment allocations for local needs including expansion of the Rackheath employment area</td>
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<td>• retention of existing important greenspaces and significant levels of heathland re-creation to provide stepping stones to link Mousehold Heath to the surrounding countryside. Building design including, for example, appropriate use of ‘green roofs’ will help provide linkage between green spaces</td>
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<td>• restoring and conserving historic parkland and important woodland. A significant area north of Rackheath will be provided as green space to act as an ecological buffer zone and ensure no significant adverse impacts on the Broads SAC, Broadland SPA and Broadland Ramsar site</td>
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<td>• Bus Rapid Transit to the city centre, possibly via Salhouse Road and Gurney Road, and a choice of safe and direct cycle routes to the centre</td>
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<td>• safe and direct cycle and pedestrian routes, and orbital bus services, to Broadland Business Park, Rackheath employment area, airport employment areas and to the surrounding countryside</td>
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<td>• new rail halts at Rackheath and Broadland Business Park</td>
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<td>• permeability and community integration across the Northern Distributor Road and with existing communities. This will be crucial for the successful development of the area</td>
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<td>• a new household waste recycling centre.</td>
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| | | A single co-ordinated approach will be required across
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<tr>
<td>[N.B. the words in square brackets are included for clarification purposes only] the whole area. This will be provided through the preparation of an Area Action Plan (or any future equivalent process). More detailed masterplanning will be required for each quarter.</td>
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<tr>
<td>Policy 10: Para 6.15</td>
<td>Page 66</td>
<td>The major urban extension in the Old Catton, Sprowston, Rackheath, and Thorpe St Andrew growth triangle will provide a concentration of growth which can support local services, facilities, and infrastructure including secondary education, high quality public transport links and significant green infrastructure. An Area Action Plan and a sustainable development code are being developed. The growth triangle is proposed to accommodate 10,000 dwellings after 2026. A large part of the [development at Rackheath was promoted as an eco-community under the previous Government’s eco-towns programme.] The Rackheath low carbon development remains part of this strategy.</td>
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<tr>
<td>Para 6.16 second line</td>
<td>Page 66</td>
<td>[This makes a] similar [large-scale urban expansion inappropriate.]</td>
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<tr>
<td>Para 6.19</td>
<td>Page 66</td>
<td>[In particular it is necessary to allow] significant development in the growth triangle and [the full implementation of the remainder of the Norwich Area Transportation Strategy. The completion of appropriate improvements at Postwick junction would allow for some development] in the Old Catton, Sprowston, Thorpe St Andrew growth triangle [in advance of the NDR] (see supporting text for Policy 20).</td>
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<tr>
<td>Para 6.20 fourth sentence</td>
<td>Page 67</td>
<td>[The growth] in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew area [will require the implementation of bus priority routes into the city centre including] a [Bus Rapid Transit] route which may be via Gurney Road/Salhouse Road.</td>
</tr>
<tr>
<td>Paragraph 6.22</td>
<td>Page 67</td>
<td>A new secondary school is needed to serve the new community in the north east. [The form and location of secondary provision for growth in the west and south west is] more [complex and yet to be determined.]</td>
</tr>
<tr>
<td>Diagram following policy 10, entitled “Green infrastructure”</td>
<td>Page 69</td>
<td>Add notation to show the ‘Growth location’ and ‘Priority areas for Green Infrastructure’ to the northeast of the urban area. Add notation to show priority corridor A from Norwich to</td>
</tr>
<tr>
<td>Section of Joint Core Strategy</td>
<td>JCS page no.</td>
<td>Text/diagram proposed to be adopted (underlined)</td>
</tr>
<tr>
<td>---------------------------------</td>
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<tr>
<td>priority areas supporting key growth locations “the Broads.” (see plan attached as Appendix 5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy 12: The remainder of the Norwich urban area, including the fringe parishes: 1st paragraph</td>
<td>Page 74</td>
<td>[It will be expanded] through significant growth in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, and smaller urban extensions at Cringleford, and Easton/Costessey (Policy 10).]</td>
</tr>
<tr>
<td>Policy 15 Service Villages third paragraph</td>
<td>Page 84</td>
<td>[In addition to the settlements above, Easton] and Rackheath have equivalent status to a Service Village while providing a location for significant housing growth.]</td>
</tr>
<tr>
<td>Policy 19, The hierarchy of centres Point 3.</td>
<td>Page 89</td>
<td>[New district centres/high streets to be established within the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, at Blue Boar Lane, Sprowston and Hall Road, Norwich.] The Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle will be served by a district centre. This may be provided by building on the proposed district centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Triangle as determined through the Area Action Plan for the Growth Triangle.</td>
</tr>
<tr>
<td>Paragraph 6.77</td>
<td>Page 90</td>
<td>[The proposed large-scale housing areas will provide for shops and services to meet local needs where they are not able to benefit from existing centres.] The Old Catton, Rackheath, Sprowston and Thorpe St Andrew growth triangle in particular will be sufficiently large to require a district centre. Preferably this will include a food store as an anchor and sufficient leisure and ancillary activities to provide for the attraction of a range of trips. This may be through building on the proposed centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Growth Triangle. This will be determined through the Area Action Plan for the area.</td>
</tr>
<tr>
<td>07 Implementation and monitoring, Paragraph 7.16 and table below</td>
<td>Page 95</td>
<td>See MM1 in Appendix 1</td>
</tr>
<tr>
<td>Section of Joint Core Strategy</td>
<td>JCS page no.</td>
<td>Text/diagram proposed to be adopted (underlined)</td>
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<tr>
<td>--------------------------------</td>
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<td>-------------------------------------------------</td>
</tr>
<tr>
<td><strong>Para 7.17</strong></td>
<td>Page 95</td>
<td>Broadland District Council is committed to preparing an Area Action Plan (AAP) for the growth triangle. As part of the preparation of this AAP there will be an investigation of any potential that may exist for further growth to take place (in addition to that shown in table 1 above) without confirmation of the delivery of the NDR. This will include testing whether interim schemes and/or alternatives to the NDR could help to facilitate growth without compromising the spatial vision and objectives of the JCS. Therefore, the analysis would need to cover capacity of all infrastructure, not just road capacity, the implications of particular sites, and the nature of the proposed development. [It will be essential that the growth is delivered in accordance with the overall strategy, taking account of its wider impact across the Norwich area, including a full range of infrastructure provision, services and high-quality public transport and walking/cycling provision.]</td>
</tr>
<tr>
<td><strong>Para 7.18</strong></td>
<td>Page 96</td>
<td>[Development beyond the pre-NDR threshold established through the AAP process] will not be possible without a commitment to the NDR. If it becomes clear that there is no possibility of the timely construction of the NDR, a review of the JCS proposals for the growth triangle [and the implications for the strategy as a whole would be triggered.]</td>
</tr>
<tr>
<td>New text inserted following Para 7.18</td>
<td>Page 96</td>
<td>See MM2 in Appendix 1</td>
</tr>
<tr>
<td>Appendix 5 <em>Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle</em></td>
<td>Page 107</td>
<td>Insert map showing the area of the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’ (see plan attached at Appendix 6)</td>
</tr>
</tbody>
</table>
| Appendix 6                     | Pages 108-111 | *Insert following note onto each of the first four pages of App 6 (as per Inspector’s modification MM3 in Appendix 1):*
This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes... |
<table>
<thead>
<tr>
<th>Section of Joint Core Strategy</th>
<th>JCS page no.</th>
<th>Text/diagram proposed to be adopted (underlined)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>[N.B. the words in square brackets are included for clarification purposes only] assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.</td>
</tr>
<tr>
<td>Appendix 6 housing trajectory -- table entitled “Growth locations”</td>
<td>Page 113</td>
<td>See MM4 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 6a to be inserted after Appendix 6</td>
<td>-</td>
<td>See MM5 in Appendix 1</td>
</tr>
<tr>
<td>Appendix 7</td>
<td>Pages 114-147</td>
<td>See MM6 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 7a to be inserted after Appendix 7</td>
<td>-</td>
<td>See MM7 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 8a to be inserted after Appendix 8</td>
<td>-</td>
<td>See MM8 in Appendix 1</td>
</tr>
</tbody>
</table>
# Main Modifications

The modifications below are expressed either in the conventional form of strikethrough for deletions and underlining for additions of text, or by specifying the modification in words in *italics*.

The page numbers and paragraph numbering below refer to the combined submission Plan with the JCS [SDJCS 1], and do not take account of the deletion or addition of text.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM1</td>
<td>95</td>
<td>Para 7.16 and table below</td>
<td>Make changes attached as MM1</td>
</tr>
<tr>
<td>MM2</td>
<td>96</td>
<td>New section Paras 7.19-20 and Policies 21 and 22</td>
<td>Insert new section, as attached as MM2</td>
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</tbody>
</table>
| MM3 | 108  | Appendix 6       | Insert following note onto each of the first four pages of App 6:  
This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report. |
| MM4 | 113  | Table headed Growth Locations | Make changes attached at MM4 |
| MM5 | -    | -                | Insert new Appendix 6a, following Appendix 6, as attached at MM5 |
| MM6 | 114-147 | Appendix 7 | Make changes attached at MM6 |
| MM7 | -    | New              | Insert new Appendix 7a, following Appendix 7, as |
Appendix 1 – Main Modifications

<table>
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<th>Main Modification</th>
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<tr>
<td>MM8</td>
<td>-</td>
<td>New section</td>
<td>Insert new Appendix 8a, following Appendix 8, as attached at MM8</td>
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Please note - where large new sections are inserted (see MM2, 5, 7 and 8) the additional text is not underlined.
Appendix 1 – Main Modifications

MM1

<table>
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<th>Ref</th>
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<th>Policy/Paragraph</th>
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<tr>
<td>MM1</td>
<td>95</td>
<td>Para 7.16 and table below</td>
</tr>
</tbody>
</table>

7.16 Pending clarification of the NDR’s delivery or otherwise, the existing commitment of 1400 dwellings in the Sprowston Fringe can take place without improvements to Postwick Junction. Subject to acceptable improvements to Postwick junction (in the form of Postwick Hub or a suitable alternative) there is significant potential for further development in the growth triangle before confirmation of the delivery of the NDR. The table below summarises the current understanding of this potential.

<table>
<thead>
<tr>
<th>Location</th>
<th>Level of growth supported by current evidence</th>
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<tbody>
<tr>
<td>Growth Triangle</td>
<td>At least 1600 dwellings (plus 200 exemplar at Rackheath prior to Postwick junction improvements)</td>
</tr>
<tr>
<td>Smaller sites in Broadland NPA</td>
<td>Delivery of the smaller sites allowance will be dealt with on a site by site basis</td>
</tr>
<tr>
<td>Broadland Business Park</td>
<td>Development of existing allocation and new allocation (approx 18ha incl c50,000m2 B1)</td>
</tr>
<tr>
<td>Airport area</td>
<td>New employment allocation</td>
</tr>
</tbody>
</table>

Insert the following text:

"7.16 Pending clarity on Postwick Hub’s and the NDR’s delivery, the table below summarises the current understanding of development potential offered by the strategic locations in the Broadland NPA as at 2013. The delivery of the smaller sites allowance in the Broadland NPA will be dealt with on a site by site basis as the dependence on Postwick junction and the NDR will vary with location."
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Development Area</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Rackheath</strong> (in addition to 94 existing consented dwellings)</td>
<td>Further development that can come forward following improvements to Postwick Junction and in advance of confirmation of delivery of the NDR:</td>
</tr>
<tr>
<td><strong>Growth Triangle</strong></td>
<td>At least 1600 dwellings</td>
</tr>
<tr>
<td><strong>Broadland Business Park</strong></td>
<td>Development of existing allocation and new allocation (approx. 18ha including c50,000m2 B1)</td>
</tr>
<tr>
<td><strong>Development that cannot come forward until confirmation of delivery of the NDR:</strong></td>
<td>All remaining housing in the Growth Triangle and new employment allocation at Rackheath</td>
</tr>
<tr>
<td><strong>Airport Area</strong></td>
<td>New employment allocation</td>
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</tbody>
</table>
Appendix 1 – Main Modifications

MM2

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<th>Ref</th>
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<tr>
<td>MM2</td>
<td>96</td>
<td>New section Paras 7.19-20 and Policies 21 and 22</td>
</tr>
</tbody>
</table>

Insert new section as follows:

**Implementation and delivery within the Broadland part of the Norwich Policy Area**

7.19 Following the adoption of the Joint Core Strategy in March 2011 a court judgment remitted parts of the previously adopted plan for further consideration. This judgment remitted specific elements of the proposals within the Broadland part of the Norwich Policy Area and in particular: a) the Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (including employment growth at Rackheath but excluding employment land at Broadland Business Park and the airport); and b) 2000 homes proposed on smaller sites throughout the Broadland part of the Norwich Policy Area. These proposals were resubmitted for further examination, and policies 21 and 22 were necessary in order to ensure the soundness of this part of the JCS. For the avoidance of doubt, policies 21 and 22 below apply only to the proposals previously remitted by the Court order.

7.20 Between the original adoption of the JCS and consideration of the remitted proposals, key infrastructure items serving the Broadland part of the NPA were not progressed at the rate envisaged in the original JCS. Because of this, and the further scrutiny of the remitted elements of the plan in the light of updated government guidance about the housing land supply and deliverability of the plan proposals, it was considered necessary to strengthen policy with regard to a positive approach to sustainable development, monitoring and housing land supply. Progress regarding delivery of housing land will be rigorously monitored against targets. If monitoring reveals that the Broadland part of the NPA will significantly under deliver in terms of a 5-year housing land supply (plus the “additional buffer” required in national policy), then action will be taken to address this as set out in policy 22.

**Policy 21: Implementation of proposals in the Broadland part of the Norwich Policy Area**

When considering development proposals in their part of the Norwich Policy Area Broadland District Council will take a positive approach that reflects the presumption in favour of sustainable development contained in the National Planning Policy Framework. It will always work proactively with applicants jointly to find solutions which mean that proposals can be approved wherever possible, and to secure development that improves the economic, social and environmental conditions in the area.
Planning applications that accord with the policies in this Local Plan (and, where relevant, with policies in neighbourhood plans) will be approved without delay, unless material considerations indicate otherwise.

Where there are no policies relevant to the application or relevant policies are out of date at the time of making the decision then the Council will grant permission unless material considerations indicate otherwise – taking into account whether:

- Any adverse impacts of granting permission would significantly and demonstrably outweigh the benefits, when assessed against the policies in the National Planning Policy Framework taken as a whole; or
- Specific policies in that Framework indicate that development should be restricted.

**Policy 22: Action to ensure the delivery of housing land in the Broadland part of the Norwich Policy Area**

In addition to the JCS review “trigger” set out in paragraph 7.18, if any Monitoring Report (MR) produced after two full years from the adoption of this part-JCS Local Plan demonstrates that there is a significant shortfall (as defined below) in the 5-year supply of housing land (plus the “additional buffer” required in current national policy) affecting the Broadland part of the Norwich Policy Area (NPA), then the Councils will take the course of action specified below to address the identified shortfall.

The Councils will consider that a significant shortfall has arisen if the MR (produced annually) shows there to be less than 90% of the required deliverable housing land (as defined in current national policy).

In the event of an identified shortfall, the Councils will produce a short, focussed Local Plan which will have the objective of identifying and allocating additional locations within the whole NPA area for immediately deliverable housing land to remedy that shortfall, in accordance with the settlement hierarchy set out in paragraph 6.2 of the JCS. The Local Plan will cover such a time period as may reasonably be considered necessary for the delivery delay or shortfall (however caused) to be resolved.
Growth locations (excluding the Broadland part of the Norwich Policy Area)

This table illustrates the trajectory as anticipated in 2010 for the Plan excluding figures for the Broadland part of the Norwich Policy Area. It is now out of date. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the Annual Monitoring Report.

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<td>Additional sites around Rural South Norfolk</td>
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</table>

Appendix 1 – Main Modifications
###Appendix 1 – Main Modifications

**MM5**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
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<tr>
<td>MM5</td>
<td>-</td>
<td>-</td>
<td>Insert new Appendix 6a, to follow Appendix 6</td>
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</table>

###Appendix 6a

Trajectory of delivery of Homes expected from previously remitted Growth Locations in Broadland part of NPA

<table>
<thead>
<tr>
<th></th>
<th>14/15</th>
<th>15/16</th>
<th>16/17</th>
<th>17/18</th>
<th>18/19</th>
<th>19/20</th>
<th>20/21</th>
<th>21/22</th>
<th>22/23</th>
<th>23/24</th>
<th>24/25</th>
<th>TOTAL</th>
<th>Av build</th>
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<tbody>
<tr>
<td>Rackheath</td>
<td>77</td>
<td>77</td>
<td>70</td>
<td>185</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>2249</td>
<td>187</td>
</tr>
<tr>
<td>Remainder of Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (inside NDR)</td>
<td>20</td>
<td>163</td>
<td>234</td>
<td>373</td>
<td>435</td>
<td>440</td>
<td>515</td>
<td>590</td>
<td>530</td>
<td>530</td>
<td>530</td>
<td>497</td>
<td>4857</td>
</tr>
<tr>
<td>Additional small sites around Broadland NPA</td>
<td>98</td>
<td>148</td>
<td>161</td>
<td>266</td>
<td>328</td>
<td>300</td>
<td>225</td>
<td>150</td>
<td>150</td>
<td>25</td>
<td>0</td>
<td>2001</td>
<td>167</td>
</tr>
<tr>
<td>Total</td>
<td>195</td>
<td>388</td>
<td>465</td>
<td>824</td>
<td>993</td>
<td>970</td>
<td>970</td>
<td>970</td>
<td>910</td>
<td>910</td>
<td>785</td>
<td>727</td>
<td>9107</td>
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</tbody>
</table>

This trajectory illustrates delivery anticipated at July 2013. It should not be summed with figures produced in Appendix 6. For up to date information please see the Annual Monitoring Report.
Appendix 7: Implementation Framework and Critical Path outside of the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date, including in the growth triangle where 3,000 dwellings are proposed after 2026. This table was correct at late 2010 and relates only to infrastructure that is not required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website. Updated information on infrastructure schemes needed in part to support some element of the previously remitted growth proposals in the Broadland part of the NPA is available in Appendix 7a.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

**Priority 1 - Infrastructure** is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

**Priority 2 - Infrastructure** is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.
**Priority 3 - Infrastructure** is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals.

**Table 1 – Infrastructure Framework** shows infrastructure requirements to support growth across the JCS period.
### Table 1 – Infrastructure Framework

#### Infrastructure Framework: Priority 1 projects 2008 - 2016

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

#### Waste Water

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade solutions subject to ongoing discussions with Anglian Water</td>
<td>Rackheath</td>
<td>Developer</td>
<td>tba</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP3</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>42.9</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP4</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>5</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP5</td>
<td>Wymondham upgrade (Option 2)</td>
<td>Wymondham</td>
<td>Anglian Water</td>
<td>13.8</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP6</td>
<td>Rackheath (Option 2)</td>
<td>Rackheath</td>
<td>Anglian Water</td>
<td>48</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

**Green Infrastructure**

*The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.*

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<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI-16</td>
<td>Retention and recreation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI-17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
### Electricity

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1</td>
<td>New primary sub-station on existing site (Hurricane Way)</td>
<td>Expansion of the employment area - airport business park</td>
<td>EDF energy</td>
<td>5.5</td>
<td>70% AMP ● 30% Developer contributions</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>

### Transportation

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment).
### Appendix 1 – Main Modifications

**and Utilities.**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T1</td>
<td>Norwich Northern Distributor Road</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle ● Broadland: Smaller sites in the NPA (2000 dwellings) ● Norwich Area Transportation Strategy including delivery of BRT ● Broadland Business Park ● Airport-employment allocation</td>
<td>Norfolk County Council</td>
<td>106.2</td>
<td>DfT £67.5m ● Growth Point ● Developer Contributions ● Norfolk County Council</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T2a</td>
<td>Postwick Junction improvements</td>
<td>Overall Scale of Growth. Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle ● Broadland: Smaller sites in the NPA (2000 dwellings) ● Norwich Area Transportation Strategy including delivery of BRT ● Broadland Business Park ● Airport-employment allocation</td>
<td>Norfolk County Council</td>
<td>19</td>
<td>DfT ● Growth Point 3.5 ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>body</td>
<td>£m</td>
<td>dates by</td>
<td></td>
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</tr>
<tr>
<td><strong>T4 &amp; T17</strong></td>
<td>Thickthorn junction improvement including bus priority and park and ride improvements</td>
<td>Wymondham, Hethersett and Cringleford Growth Locations</td>
<td>Norfolk County Council/Highways Agency</td>
<td>30</td>
<td>Developer contributions</td>
<td>2016 (scheme expected to be phased)</td>
<td>NATS</td>
</tr>
<tr>
<td><strong>T5</strong></td>
<td>Longwater junction improvements</td>
<td>West Growth Location</td>
<td>Norfolk County Council/Highways Agency</td>
<td>30</td>
<td>Norfolk County Council • DfT • Growth Point • Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td><strong>T6</strong></td>
<td>Norwich Research Park transport infrastructure phase 1</td>
<td>Norwich Research Park</td>
<td>Norfolk County Council/Highways Agency</td>
<td>5</td>
<td>Growth Point • Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in:</td>
<td>Promoter/ Delivery body</td>
<td>Total Cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
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</tr>
<tr>
<td>T7</td>
<td>Bus improvements Newmarket Road</td>
<td>Wymondham, Hethersett and Cringleford ● Norwich Area Transportation Strategy including delivery of BRT</td>
<td>Norfolk County Council</td>
<td>0.4</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>NATS</td>
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<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
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<td>Norfolk County Council/ Norwich City Council</td>
<td>1</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 1</td>
<td>Broadland Fringe Growth (subject to location of growth)</td>
<td>Norfolk County Council/ Norwich City Council</td>
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<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus Rapid Transit via Dereham Road - Phase 1</td>
<td>West Growth Location</td>
<td>Norfolk County Council/ Norwich City</td>
<td>1.25</td>
<td>Growth Point</td>
<td>2010 – 2011</td>
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<td>Total Cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
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<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 1</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
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<tr>
<td>T11</td>
<td>Bus Rapid Transit via Salhouse Road and Gurney Road - Phase 1</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.8</td>
<td>Eco-community PeD ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre - Phase 1</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2011–2016</td>
<td>NATS</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
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<td>Total Cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
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<td>--------</td>
</tr>
<tr>
<td>T13</td>
<td>Bus priority route via Hethersett Lane/ Hospital/ Norwich Research Park/ University of East Anglia/ City centre</td>
<td>Wymondham, Hethersett and Cringleford Growth Location &amp; NRP</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.7</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T14</td>
<td>Bus priority route via B1172 phase 1</td>
<td>Wymondham, Hethersett Growth Location</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.7</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T15</td>
<td>Development Link—Broadland Business Park to Salhouse Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe—St Andrew Growth triangle</td>
<td>Developer Lead</td>
<td>2.5</td>
<td>Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T16</td>
<td>Bus priority approach to Harford Junction</td>
<td>Long Stratton Growth Location</td>
<td>Norfolk County Council/ Highways Agency</td>
<td>2</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
</tbody>
</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Lady Julian Bridge</td>
<td>NATS  ● City centre</td>
<td>Norwich City Council</td>
<td>2.58</td>
<td>Growth Point  ● S106  ● EEDA</td>
<td>Delivered</td>
<td>NATS</td>
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<tr>
<td>N/A</td>
<td>Barrack Street ring-road improvement works</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.3</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>NATS</td>
</tr>
<tr>
<td>N/A</td>
<td>St Augustine’s Gyratory</td>
<td>Norwich Area Transportation Strategy including delivery of BRT  ● City centre bus enhancements</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>3.49</td>
<td>Growth point 2.42  ● LTP 1.04  ● S106 0.03</td>
<td>2010</td>
<td>NATS</td>
</tr>
</tbody>
</table>

**Totals**

155.30

341.30
Infrastructure Framework: Priority 1 projects 2016 -2021

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

Waste Water

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities

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<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
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</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Developer</td>
<td>TBA</td>
<td>Developer/ AW provision</td>
<td>2021</td>
<td>Water Cycle Study Stage 2b</td>
</tr>
<tr>
<td>SP2</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
<td>TBA</td>
<td>Developer/ AW provision</td>
<td>2021</td>
<td>Water Cycle Study Stage 2b</td>
</tr>
<tr>
<td>SP7</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>14.4</td>
<td>Developer/ AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage</td>
</tr>
<tr>
<td>SP8</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>0.8</td>
<td>Developer/ AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage</td>
</tr>
<tr>
<td>SP9</td>
<td>Wymondham upgrade (Option 2)</td>
<td>West growth locations</td>
<td>Anglian Water</td>
<td>22.4</td>
<td>Developer/ AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

**Electricity**

*The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.*

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<tr>
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<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U2</td>
<td>New primary substation on new site (Norwich Airport north)</td>
<td>Expansion of the employment area – airport business park – Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>EDF energy</td>
<td>6.3</td>
<td>Developer contributions</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>U3</td>
<td>New grid sub-station on existing sites (Norwich East)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>EDF energy</td>
<td>17</td>
<td>100% AMP</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
Green Infrastructure

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment and Utilities). All potable water improvements are delivered through the AMP process and are not included in this table.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth in particular Wymondham, Hethersett and Cringleford Growth Locations</td>
<td>Local authorities/Developers</td>
<td>tba</td>
<td>Local authorities/Developer contribution</td>
<td>2021</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI 16</td>
<td>Retention and re-creation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe-St-Andrew Growth Triangle</td>
<td>Local authorities/Developers</td>
<td>tba</td>
<td>Local authorities/Developer contribution</td>
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<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI 17</td>
<td>Broads-Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe-St-Andrew Growth Triangle</td>
<td>Local authorities/Developers</td>
<td>tba</td>
<td>Local authorities/Developer contribution</td>
<td>2021</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
# Transportation

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment and Utilities. All potable water improvements are delivered through the AMP process and are not included in this table.

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<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T3</td>
<td>Long Stratton bypass A140 including improvement at Hempnall crossroads</td>
<td>Long Stratton Growth Locations</td>
<td>Developer / Norfolk County Council</td>
<td>20</td>
<td>Developer contributions</td>
<td>2021</td>
<td>Developer</td>
</tr>
<tr>
<td>T6</td>
<td>Norwich Research Park transport infrastructure phase 2</td>
<td>Norwich Research Park</td>
<td>Norfolk County Council/ Highways Agency</td>
<td>8</td>
<td>Growth Point ● Developer contributions</td>
<td>2021</td>
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<tr>
<td>T7</td>
<td>Bus priority - approach to Harford Junction</td>
<td>Overall Growth</td>
<td>Norfolk County Council</td>
<td>2</td>
<td>Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.6</td>
<td>Growth Point ● LTP ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in:</td>
<td>Promoter/ Delivery body</td>
<td>Total Cost £m</td>
<td>Funding sources</td>
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<td>--------</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 2</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>6</td>
<td>Growth Point • LTP • Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 2</td>
<td>Broadland Fringe Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>5</td>
<td>Norfolk County Council • DfT • Growth Point • Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus improvements Dereham Road phase 2</td>
<td>West Growth Locations</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.6</td>
<td>Growth Point • Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 2</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>5</td>
<td>Norfolk County Council • DfT • Growth Point • Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road phase 2</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.6</td>
<td>Developer contributions • Rackheath PoD</td>
<td>2021</td>
<td>NATS</td>
</tr>
</tbody>
</table>
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
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<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre – Phase 2</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T15</td>
<td>Development Link Broadland Business Park to Salhouse Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>-Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>88.80</strong></td>
<td><strong>122.20</strong></td>
<td></td>
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</tbody>
</table>
## Infrastructure Framework: Priority 1 projects 2021 -2026

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

### Waste Water

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
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</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe—St Andrew Growth triangle</td>
<td>Developer</td>
<td>tba</td>
<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
</tr>
<tr>
<td>SP2</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
<td>tba</td>
<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
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<tr>
<td>SP10</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>4.3</td>
<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
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<tr>
<td>SP11</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>0.4</td>
<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
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</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th>body</th>
<th>£m</th>
<th>dates by</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SP12</td>
<td>Wymondham upgrade (Option 2)</td>
<td>West growth locations</td>
<td>Anglian Water</td>
<td>0.5</td>
<td>Developer/AW provision</td>
<td>2026</td>
</tr>
<tr>
<td>SP13</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Long Stratton</td>
<td>Anglian Water</td>
<td>Tba</td>
<td>Developer/AW provision</td>
<td>2026</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

---

**Electricity**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

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<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U4</td>
<td>New primary substation on new site (Sprowston/Rackheath)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrews growth triangle</td>
<td>EDF energy</td>
<td>4.3</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>U5</td>
<td>Replacement of transformers and switchgear in existing site (Hapton)</td>
<td>Long Stratton</td>
<td>EDF energy</td>
<td>2.53</td>
<td>83% AMP 17% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>U6</td>
<td>Replacement of transformers and switchgear in existing site (Wymondham)</td>
<td>SW Growth location</td>
<td>EDF energy</td>
<td>2.53</td>
<td>67% AMP 33% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

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<tr>
<td>GI-16</td>
<td>Retention and recreation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>-</td>
<td>tba</td>
<td>-</td>
<td>2026</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
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### Transportation

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</tr>
</thead>
<tbody>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 3</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>6</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021 - 2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 3</td>
<td>Broadland Fringe Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus improvements Dereham Road phase 3</td>
<td>West Growth Location</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>2.6</td>
<td>Growth Point ● LTP ● Developer contributions</td>
<td>2021 - 2026</td>
<td>NATS</td>
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</table>
### Appendix 1 – Main Modifications

<table>
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<tr>
<th>Ref</th>
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<tbody>
<tr>
<td>T10</td>
<td><strong>Bus Rapid Transit via Yarmouth Road - Phase 3</strong></td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T11</td>
<td><strong>Bus improvements via Salhouse Road and Gurney Road phase 3</strong></td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>0.6</td>
<td>Rackheath PoD ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T12</td>
<td><strong>Bus Rapid Transit via Norwich airport A140 to City centre – Phase 3</strong></td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
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<tr>
<td></td>
<td><strong>Totals</strong></td>
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<td></td>
<td>23.86 31.26</td>
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</tbody>
</table>
**Infrastructure Framework: Priority 2 projects 2008-2016**

### Education

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED3</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2011</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED4</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
**Healthcare**

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC1</td>
<td>GPs Surgery (3 GPs)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.03</td>
<td>Health Authority / Developer contribution</td>
<td>2011</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC2</td>
<td>Dentists surgery (4 Dentists)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.25</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>HC6</td>
<td>Expansion of existing facilities (2 GPs and 2 Dentists)</td>
<td>Broadland Elsewhere</td>
<td>Health Authority</td>
<td>0.9</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC12</td>
<td>Expansion of existing facilities (7 GPs and 7 Dentists)</td>
<td>South Norfolk Elsewhere</td>
<td>Health Authority</td>
<td>3.5</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
<td>Health Authority</td>
<td>10</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
### Green infrastructure

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/ Delivery body</th>
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</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Wensum River Parkway</td>
<td>Overall scale of growth</td>
<td>HEART/ Norwich City Council</td>
<td>0.07</td>
<td>Growth Point Delivered</td>
<td>Green Infrastructure Steering Group</td>
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<tr>
<td>N/A</td>
<td>Catton Park visitor centre and park improvements</td>
<td>Overall scale of growth</td>
<td>Catton Park Trust/ Norfolk County Council</td>
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<td>Growth Point Delivered</td>
<td>Green Infrastructure Steering Group</td>
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<tr>
<td>N/A</td>
<td>Whitlingham Country Park Access Improvements</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
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<td>Growth Point Delivered</td>
<td>Green Infrastructure Steering Group</td>
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</tr>
<tr>
<td>N/A</td>
<td>Wooded ridge</td>
<td>Overall scale of growth</td>
<td>Norwich City Council</td>
<td>0.04</td>
<td>Growth Point Delivered</td>
<td>Green Infrastructure Steering Group</td>
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<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
<td>Overall scale of growth</td>
<td>Various</td>
<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
<td>2016</td>
<td>Green Infrastructure Steering Group</td>
</tr>
</tbody>
</table>

| Totals | | | 18.36 | | | |
## Infrastructure Framework: Priority 2 projects 2016-2021

### Education

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

<table>
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<tr>
<th>Ref</th>
<th>Scheme</th>
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<th>for</th>
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<tbody>
<tr>
<td>ED1</td>
<td>60-place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>ED1</td>
<td>60-place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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## Appendix 1 – Main Modifications

<table>
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<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
<tr>
<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
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<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
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<td>Norfolk County Council</td>
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<td>Developer contribution</td>
<td>2021</td>
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<td>Norfolk County Council</td>
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<td>ED7</td>
<td>60 place pre-school</td>
<td>Easton</td>
<td>Norfolk County Council</td>
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<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>26</td>
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## Healthcare

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
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<tr>
<td>HC3</td>
<td>Expansion of existing facilities (6 GPs and 5 Dentists)</td>
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<td>HC4</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority / Developer contribution</td>
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## Appendix 1 – Main Modifications

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<th>Estimated delivery dates by Source</th>
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<tr>
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<td>Expansion of existing facilities (3 GPs and 2 Dentists)</td>
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<td>Health Authority</td>
<td>1.8</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
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<tr>
<td>HC9</td>
<td>Expansion of existing facilities (1 GP and 1 Dentist)</td>
<td>Hethersett</td>
<td>Health Authority</td>
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<td>Health Authority / Developer contribution</td>
<td>2021</td>
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<td>HC11</td>
<td>Expansion of existing facilities (1 GP and 1 Dentist)</td>
<td>Easton / Costessey</td>
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<td>HC13</td>
<td>Hospital bed requirements</td>
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<td>Health Authority</td>
<td>6</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
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</table>

### Green infrastructure

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.
### Infrastructure Framework: Priority 2 projects 2021-2026

#### Education

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in: for delivery</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
<tr>
<td>ED2</td>
<td>60-place pre-school</td>
<td>Old Catton, Spreston, Rackheath, and Thorpe-St Andrew</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Wymondham</td>
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<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>2FE place primary</td>
<td>Cringleford</td>
<td>Norfolk County Council</td>
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<td>Developer contribution</td>
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<tr>
<td>ED8</td>
<td>1 FE place primary</td>
<td>Hethersett</td>
<td>Norfolk County Council</td>
<td>2.3</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>

**Growth Triangle**

- ED2 2FE primary with integrated 60 place nursery
  - Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle
  - Norfolk County Council
  - 5.14 Developer contribution
  - 2026

- ED2 2FE primary with integrated 60 place nursery
  - Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle
  - Norfolk County Council
  - 5.14 Developer contribution
  - 2026

- ED6 60 place pre-school co-located with 600sqm combined community centre and library
  - Norwich City
  - Norfolk County Council
  - 0.54 Developer contribution
  - 2026

- ED8 60 place pre-school
  - Wymondham
  - Norfolk County Council
  - 0.54 Developer contribution
  - 2026

- ED8 2FE place primary
  - Cringleford
  - Norfolk County Council
  - 2.3 Developer contribution
  - 2026

- ED8 1 FE place primary
  - Hethersett
  - Norfolk County Council
  - 2.3 Developer contribution
  - 2026
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>ED8</th>
<th>60 place pre-school</th>
<th>Long Stratton</th>
<th>Norfolk County Council</th>
<th>0.54</th>
<th>Developer contribution</th>
<th>2026</th>
<th>Infrastructure Needs and Funding Study</th>
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</thead>
<tbody>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts phase 2</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
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<td>ED8</td>
<td>2FE primary with integrated 60 place pre-school co-located with combined community centre and library</td>
<td>Long Stratton</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Cringleford</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>1FE primary</td>
<td>Easton</td>
<td>Norfolk County Council</td>
<td>2.5</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>

| Ref  | Scheme                          | Required in: for growth in: | Promoter/ Delivery body | Total Cost £m | Funding sources | Estimated delivery dates by | Source |  |
|------|---------------------------------|-------------------------------|-------------------------|---------------|----------------|----------------------------|--------|
| ED10 | Expanded secondary school provision | Wymondham, Hethersett, Cringleford, Costessey / Easton, Long Stratton, rest of South Norfolk | Norfolk County Council | 10 | Developer contribution | 2026 | Infrastructure Needs and Funding Study and ongoing assessment of options |
The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

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<tr>
<th>Ref</th>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC5</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC8</td>
<td>Combined surgery (2 GPs and 2 Dentists)</td>
<td>Long Stratton</td>
<td>Health Authority</td>
<td>1.5</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC10</td>
<td>Expansion of existing facilities (1 GP and 1 Dentist)</td>
<td>Cringleford</td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021 - 2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
### Green infrastructure

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.

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<tr>
<th>Ref</th>
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<th>Required growth in:</th>
<th>for</th>
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<th>Total Cost £m</th>
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<th>Estimated delivery dates by</th>
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<td>Green infrastructure projects and open space</td>
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<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
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<td>Green Infrastructure Steering Group</td>
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</table>

| Totals | | | | | £39.05 | 66.22 | | |
## Community facilities

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
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<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>2011-16</td>
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<td>CF3-5</td>
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<td>South Norfolk Council</td>
<td>4</td>
<td>Private companies + Developers + Local authorities</td>
<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
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</table>
## Infrastructure Framework: Priority 3 projects 2016-2021

### Community facilities

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

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<tr>
<th>Ref</th>
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<th>Required growth in:</th>
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<th>Estimated delivery dates by</th>
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<td>CF1</td>
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<td>2</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2016 - 2021</td>
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<td>CF2</td>
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<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>CF3-5</td>
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<td>South Norfolk Council</td>
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<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
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## Community services

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<tr>
<th>Ref</th>
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<td>Norfolk County Council</td>
<td>tba</td>
<td>Norfolk County Council / Developer contribution</td>
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<td>CI13</td>
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<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
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<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>CI 1-11</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) ● Norwich (22 officers) ● South</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer contribution</td>
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### Appendix 1 – Main Modifications

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## Infrastructure Framework: Priority 3 projects 2021-2026

### Community facilities

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<tbody>
<tr>
<td>CF 1</td>
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<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
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<td>Private companies ● Developers ● Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>CF 2</td>
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<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
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## Community services

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<th>Ref</th>
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</thead>
<tbody>
<tr>
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<td>Fire Service</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
<td>TBA</td>
<td>Norfolk County Council / Developer Contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>CI 13</td>
<td>Ambulance Service</td>
<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
<td>TBA</td>
<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CI 1-11</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) ● Norwich (44 officers) ● South Norfolk (64 officers)</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer Contribution</td>
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**Totals**: 13.4
Appendix 1 – Main Modifications

MM7

<table>
<thead>
<tr>
<th>Ref</th>
<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
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<tr>
<td>MM7</td>
<td>-</td>
<td>New Section</td>
<td>Insert new Appendix 7a, to follow Appendix 7</td>
</tr>
</tbody>
</table>

Appendix 7a: Implementation Framework and Critical Path inside the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date, including in the growth triangle where at least 3,000 dwellings are proposed after 2026. This table was correct at June 2013 and relates only to infrastructure that is required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

**Priority 1 Infrastructure** is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

**Priority 2 Infrastructure** is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.

**Priority 3 Infrastructure** is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure.
Appendix 1 – Main Modifications

Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals.

**Table 1 – Infrastructure Framework** shows infrastructure requirements to support growth across the JCS period.
Table 1 – Infrastructure Framework


*The base date for the Strategy is 2008. This table includes projects expected to be delivered from the base date up to 2016 (the first 5 years of delivery post adoption of the non-remitted parts of the JCS)*

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Waste water</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SP1</td>
<td>Sewerage upgrade – Anglian Water propose a north east trunk sewer to manage growth in the north east as a result of the detailed study ‘Water Cycle Study 2B’</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/ Developer</td>
<td>61.6 (across whole period)</td>
<td>AW provision/ Developer</td>
<td>in phases up to 2026</td>
<td>Water Cycle Study Stage 2B</td>
</tr>
<tr>
<td><strong>Green Infrastructure</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GI16</td>
<td>Retention and re-creation of Mousehold Heath and link to the surrounding countryside</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/ Developer</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston,</td>
<td>Local Authorities/ Developer</td>
<td>0.21</td>
<td>Local authority/CIL/Developer</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
## Transportation

<table>
<thead>
<tr>
<th>Plan</th>
<th>Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>land contributions</th>
<th>Plan</th>
</tr>
</thead>
</table>
| **T1** | Norwich Northern Distributor Road | Overall scale of growth in particular:  
- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle  
- Broadland: Smaller sites in the NPA (2000 dwellings) depending on site specifics  
- Norwich Area Transportation Strategy including delivery of BRT  
- Airport employment allocation | Norfolk County Council 107 (spend up to 2016) DfT £67.5m /CIL /Norfolk County Council 2016 | NATS |

| **T2a** | Postwick Junction improvements | Overall scale of growth in particular:  
- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle  
- Norwich Area Transportation Strategy including delivery of NDR and | Norfolk County Council 21.0 | DfT funding /Norfolk County Council 2016 |

NATS
### Infrastructure Framework: Priority 1 projects 2016 -2021

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Waste Water</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/ Developer</td>
<td>See 2008-16 period</td>
<td>AW provision/ Developer</td>
<td>in phases up to 2026</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - north east trunk sewer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T11</td>
<td>Bus Rapid Transit via Salhouse Road and Gurney Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.8</td>
<td>Rackheath PoD (Broadland District Council)/ Norfolk County Council/ DfT /CIL</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T15</td>
<td>Completion of local development Link Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Developer Lead</td>
<td>2.5</td>
<td>Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
</tbody>
</table>
## Appendix 1 – Main Modifications

<p>| | | | | | | | | |</p>
<table>
<thead>
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</tr>
</thead>
</table>
| **U2** | **New primary substation on new site (Norwich Airport north)** | • Airport employment allocation  
• Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | **UK Power Networks** | **6.3** | **UKPN** | **2021** | **Infrastructure Needs and Funding Study 2009** |   |
| **U3** | **New grid sub-station on existing sites (Norwich East)** | Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | **UK Power Networks** | **17** | 100% AMP funded | **2021** | **Infrastructure Needs and Funding Study 2009** |   |

### Green Infrastructure

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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GI 16</strong></td>
<td><strong>Retention and re-creation of Mousehold Heath to the surrounding countryside</strong></td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td><strong>Local authorities/Developers</strong></td>
<td><strong>0.033</strong></td>
<td>Local authority/CIL/On-site design</td>
<td><strong>2021</strong></td>
<td><strong>Green Infrastructure Delivery Plan</strong></td>
<td></td>
</tr>
<tr>
<td><strong>GI 17</strong></td>
<td><strong>Broads Buffer Zone</strong></td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td><strong>Local authorities/Developers</strong></td>
<td><strong>0.21</strong></td>
<td>Local authority/CIL/Developer land contributions</td>
<td><strong>2021</strong></td>
<td><strong>Green Infrastructure Delivery Plan</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Transport

<p>| | | | | | | | | |</p>
<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>T1</strong></td>
<td><strong>Norwich Northern Distributor Road</strong></td>
<td>Overall scale of growth in particular: Old Catton, Sprowston,</td>
<td><strong>Norfolk County Council</strong></td>
<td><strong>13</strong></td>
<td>Norfolk County Council</td>
<td><strong>2016 to 2021</strong></td>
<td><strong>NATS</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Infrastructure Framework: Priority 1 projects 2021 -2026

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Description</th>
<th>Location</th>
<th>Responsible Bodies</th>
<th>Funding</th>
<th>Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>T2b</td>
<td>Postwick Park and Ride</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council</td>
<td>6</td>
<td>Remaining Growth Point funding / CIL 2021 (earliest possible delivery 2015)</td>
</tr>
<tr>
<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council / Norwich City Council</td>
<td>2.6</td>
<td>Rackheath PoD / Norfolk County Council / CIL 2021</td>
</tr>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council / Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council/ DfT /CIL 2021</td>
</tr>
<tr>
<td>T15</td>
<td>Completion of local Development Link Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Developer Lead</td>
<td>2.5</td>
<td>Developer contributions 2021</td>
</tr>
</tbody>
</table>

**Appendix 1 – Main Modifications**

- Rackheath, and Thorpe St Andrew Growth triangle
  - Broadland: Smaller sites in the NPA (2000 dwellings) depending on site specifics
  - Norwich Area Transportation Strategy including delivery of BRT
  - Airport employment allocation
The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>SP1</th>
<th>Sewerage upgrade - north east trunk sewer</th>
<th>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>AW/Developer</th>
<th>See 2008-16 period</th>
<th>AW provision/Developer</th>
<th>in phases up to 2026</th>
<th>Water Cycle Study Stage 2 B</th>
</tr>
</thead>
</table>

**Electricity**

<table>
<thead>
<tr>
<th>U4</th>
<th>New primary substation on new site (Sprowston / Rackheath)</th>
<th>Old Catton, Sprowston, Rackheath, and Thorpe St Andrews growth triangle</th>
<th>UK Power Networks</th>
<th>4.3</th>
<th>UKPN / CIL</th>
<th>2026</th>
<th>Infrastructure Needs and Funding Study 2009</th>
</tr>
</thead>
</table>

**Green Infrastructure**

<table>
<thead>
<tr>
<th>GI 16</th>
<th>Retention and re-creation of Mousehold Heath to the surrounding countryside</th>
<th>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>0.033</th>
<th>Local authority/ CIL/ On-site design</th>
<th>2026</th>
<th>Green Infrastructure Delivery Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>0.21</td>
<td>Local authority/CIL/Developer land contributions</td>
<td>2026</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
## Transportation

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Location</th>
<th>Implementor</th>
<th>Cost</th>
<th>Completion Year</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>0.6</td>
<td>2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>7.5</td>
<td>2026</td>
<td>NATS</td>
</tr>
</tbody>
</table>

**Total**: 256.9
**Infrastructure Framework: Priority 2 projects 2008-2016**

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The three categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

### NOTE: All schools in the period 2008-16 are expected to be covered by S106 or are covered by Children’s Services funding

**Infrastructure Framework: Priority 2 projects 2016-2021**

**Education**

<table>
<thead>
<tr>
<th></th>
<th>Projects</th>
<th>Location</th>
<th>Authority</th>
<th>Cost</th>
<th>Funding</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED1</td>
<td>60 place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
</tr>
<tr>
<td>ED1</td>
<td>60 place pre-school (co-located with community space)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school</td>
<td>Old Catton, Sprowston,</td>
<td>Norfolk</td>
<td>13</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Infra Needs and Funding Study 2009</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th></th>
<th>Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>County Council</th>
<th>Services/CIL</th>
<th>and Funding Study 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC4</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
</tr>
</tbody>
</table>

### Infrastructure Framework: Priority 2 projects 2021-2026

#### Education

<table>
<thead>
<tr>
<th>ED2</th>
<th>60 place pre-school</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Norfolk County Council</th>
<th>0.54</th>
<th>Childrens Services/CIL</th>
<th>2026</th>
<th>Infrastructu re Needs and Funding Study 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2026</td>
<td>Infrastructu re Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2026</td>
<td>Infrastructu re Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts phase 2</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>13</td>
<td>Childrens Services/CIL</td>
<td>2026</td>
<td>Infrastructu re Needs and Funding Study 2009</td>
</tr>
<tr>
<td>HC5</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
# Infrastructure Framework: Priority 3 projects

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

## Community facilities: 2013-2016

<table>
<thead>
<tr>
<th>CF1</th>
<th>Community facilities</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Broadland District Council</th>
<th>0.54</th>
<th>Private companies / Developers / Local authorities/ CIL</th>
<th>2016</th>
<th>Infrastructure Needs and Funding Study 2009</th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
<td></td>
<td>300 sq metres community space</td>
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</tbody>
</table>

## Community facilities: 2016-2021

<table>
<thead>
<tr>
<th>CF1</th>
<th>Community facilities</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Broadland District Council</th>
<th>1.44</th>
<th>Private companies / Developers / Local authorities/ CIL</th>
<th>2021</th>
<th>Infrastructure Needs and Funding Study 2009</th>
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<tr>
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</tr>
<tr>
<td></td>
<td>600 sq metres community space</td>
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</tbody>
</table>

## Community facilities: 2021-2026

<table>
<thead>
<tr>
<th>CF 1</th>
<th>Community facilities</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Broadland District Council</th>
<th>2.54</th>
<th>Private companies / Developers / Local authorities/ CIL</th>
<th>2026</th>
<th>Infrastructure Needs and Funding Study 2009</th>
</tr>
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<tr>
<td></td>
<td>300sq metres of community space plus 4 indoor sports courts</td>
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</tr>
</tbody>
</table>
Appendix 8a – Additional monitoring framework for the Broadland part of the Norwich Policy Area

Spatial Planning Objective 1: To minimise the contributors to climate change and address its impact.

Policy: 1, 3, 5, 6, 7, 9, 10, 11, 12, 13, 14, 18, 19

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of residents who travel to work: a) by private motor vehicle; b) by public transport; c) by foot or cycle; and d) work at or mainly at home.</td>
<td>Norfolk County Council / Developers / LPAs</td>
<td>Decrease in a) and increase in b), c) and d) over plan period</td>
<td>ONS (Census)</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 2: To allocate enough land for housing, and affordable housing, in the most sustainable settlements.

Policy: 4, 9, 10, 11, 12, 13, 14, 15, 16, 17, 19, 20, 21, 22

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing land supply within Broadland part of the NPA</td>
<td>LPAs/Developers</td>
<td>To have more than 90% of the required deliverable housing land (as defined in current national policy) in the rolling 5-year supply of housing land (plus the ‘additional buffer’ required in current national policy).</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

Spatial Planning Objective 4: To promote regeneration and reduce deprivation

Policy: 5, 6, 7, 9, 10, 11, 12, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unfit housing – percentage of overall housing stock not meeting “Decent Homes Standard”</td>
<td>LAs</td>
<td>Decrease over plan period</td>
<td>LAs</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 7: To enhance transport provision to meet the needs of existing and future populations while reducing travel need and impact

Policy: 3, 6, 7, 9, 10, 12, 13, 14, 15, 16, 17, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of residents who travel to work: a) by private motor vehicle; b) by public transport; c) by foot or cycle; and d) work at or mainly at home.</td>
<td>Norfolk County Council / Developers / LPAs</td>
<td>Decrease in a) and increase in b), c) and d) over plan period</td>
<td>ONS (Census)</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 8: To positively protect and enhance the individual character and culture of the area.

Policy: 2, 5, 7, 8, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heritage at risk – number and percentage of: a) Listed Buildings; and b) Scheduled Ancient Monuments on Buildings at Risk Register</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 9: To protect, manage and enhance the natural, built and historic environment, including key landscapes, natural resources and areas of natural habitat or nature conservation value.

Policy: 1, 3, 5, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
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<th>Targets</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Heritage at risk – number and percentage of:</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
<tr>
<td>a) Listed Buildings; and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Scheduled Ancient Monuments on Buildings at Risk Register</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 2
Relationships between strategic growth locations within the Norwich Policy Area

Key
- Major housing growth & associated facilities
- Strategic employment locations
Appendix 5

Green infrastructure priority areas supporting key growth locations

Key

- Priority areas for Green Infrastructure
  - A Norwich to The Broads
  - B Wymondham to Norwich
  - C Water City
  - D Five Rivers
  - E Long Stratton to Norwich

- Norwich urban area – additional opportunities for smaller scale Green Infrastructure throughout

- Growth locations

- Main towns and key service centres

Note: Other Green Infrastructure opportunities promoted throughout the Joint Core Strategy area.

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Broadland District Council – 100022319
Norwich City Council – 100019747
South Norfolk District Council – 100019483

September 2009
Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle
Key

- Growth Area Triangle boundary
- Protected corridor for proposed NNDR
- Proposed Postwick Hub scheme
- Norwich Policy Area (inc. Salhouse Parish)
- Settlement limit (dotted line indicates proposed removal)
- Current Local Plan (2006) policies
- Area beyond Local Plan boundary
Norwich Policy Area boundary

Growth Triangle boundary

Area outside Local Plan boundary

Proposed Postwick Hub scheme

Corridor being protected by Norfolk County Council for the proposed Norwich Northern Distributor Road

Key

- Growth Area Triangle boundary
- Protected corridor for proposed NNDR
- Proposed Postwick Hub scheme
- Norwich Policy Area (inc. Salhouse Parish)
- Settlement limits (dotted line indicates removal)
- Current Local Plan (2006) policies
- Area beyond Local Plan boundary

Scale 1:45000
Changes to Local Plan Proposals Map for Joint Core Strategy

Corridor being protected by Norfolk County Council for the proposed Norwich Northern Distributor Road

Proposed Postwick Hub scheme

Footbridge

ROYALIST DRIVE

WINSTANLEY

WINCEBY CLOSE

ST ANDREWS SQUARE

THE NAVE

TEN Ten House

The Octagon

CHALGROVE FIELD

GRIFFIN LANE

Landing Stage

Horizon Business Centre

NURSERY

SMEE LANE

CROWN COPYRIGHT.  UNAUTHORISED REPRODUCTION INFRINGES CROWN COPYRIGHT AND MAY LEAD TO PROSECUTION OR CIVIL PROCEEDINGS (10001458) (2005)
Joint Core Strategy for Broadland, Norwich and South Norfolk: the Broadland part of the Norwich Policy Area

Schedule of Proposed Content to be Adopted

The schedule below details the content proposed to be adopted for the Broadland part of the Norwich Policy Area Local Plan. This includes both the content submitted by the Councils, minor modifications for accuracy, and the Main Modifications required by the Inspector to make the plan sound. The Inspector’s Main Modifications are referenced in the table below and set out in detail in Appendix 1 attached.

The page numbers and paragraph numbering below refer to the combined submission Plan with the Joint Core Strategy for Broadland, Norwich and South Norfolk [SDJCS 1], and do not take account of the deletion or addition of text. The content proposed to be adopted is shown as underlined text.

<table>
<thead>
<tr>
<th>Section of Joint Core Strategy</th>
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</thead>
<tbody>
<tr>
<td>01 Our Strategy – Para 2.14 under heading “The dilemmas”</td>
<td>P.10</td>
<td>[In assessing the evidence to help identify the most appropriate locations for growth outside of the urban area,] the area to the north east of the city [and the A11 corridor to the south west perform well. This allows] for a concentration of new [development to maximise the use of existing infrastructure…]</td>
</tr>
<tr>
<td>01 Our Strategy – Para 2.15 under heading “the dilemmas”</td>
<td>P.10</td>
<td>In the case of Broadland, the historical pattern of development lends itself to further expansion with new growth locations in the parishes of Old Catton, Sprowston and Thorpe St Andrew, and the development of a low carbon community focussing on Rackheath, given its existing employment opportunities and railway line. The growth in these locations relies on the implementation of NATS. [Implementation of NATS….]</td>
</tr>
<tr>
<td>01 Our Strategy – Para 2.16 under heading “the dilemmas”</td>
<td>P.10</td>
<td>By contrast, [the historic pattern of development in South Norfolk has focussed on its network of villages and market towns, such as Long Stratton and Wymondham, and has retained strategic green gaps between settlements.]</td>
</tr>
<tr>
<td>04 Spatial vision: third paragraph</td>
<td>Page 20</td>
<td>[Growth will be focussed on brownfield land in the Norwich urban area] and in a very large mixed use urban extension within the Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle (Appendix 5).</td>
</tr>
<tr>
<td>04 Spatial vision:</td>
<td>Page</td>
<td>inspired by the proposed exemplar at Rackheath, [zero</td>
</tr>
<tr>
<td>Section of Joint Core Strategy</td>
<td>JCS page no.</td>
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<tr>
<td>under the heading “Climate change and sustainability” 3rd bullet point</td>
<td>20</td>
<td>carbon development will be the standard to be achieved through advances and innovation in the design, construction and management of sustainable communities and new buildings which improve energy efficiency and use renewable energy.</td>
</tr>
<tr>
<td>04 Spatial vision: under the heading “Working and getting around” Second bullet point</td>
<td>Page 21</td>
<td>[investment at strategic and other employment locations will help create a stronger economy (including at Norwich city centre; Norwich Research Park, Hethel Engineering Centre, Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle [Longwater, Wymondham and around Norwich International Airport].)</td>
</tr>
<tr>
<td>Key diagram – and under objective 3</td>
<td>Page 27</td>
<td>Add notation to the key diagram to show the area to the northeast of the urban area as one to which the terms &quot;strategic employment sites&quot; and &quot;major housing growth and associated facilities&quot; apply (see plan attached as Appendix 2)</td>
</tr>
<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: under “Housing with care”</td>
<td>Page 41</td>
<td>[Mixed tenure housing with care will be required as part of overall provision in highly accessible locations. In particular provision will be required in Norwich, and the major growth locations of Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle, Cringleford, Hethersett, Wymondham and Long Stratton, and at Aylsham, Acle and Wroxham.]</td>
</tr>
<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: Table following paragraph 5.25</td>
<td>Page 43</td>
<td>Minor modification for correction of Typographical error: Column 2 header to read ‘Current Commitment 2008’</td>
</tr>
<tr>
<td>05 Area-wide policies, Policy 4 Housing Delivery: Table following paragraph 5.25</td>
<td>Page 43</td>
<td>The figure of 9,000 for the ‘New Allocations to 2026’ in the Broadland (NPA) and the total of 11,099 recorded in the table for the ‘New Commitment to 2026’ in the Broadland (NPA).</td>
</tr>
<tr>
<td>06 Policies for Places: Introduction</td>
<td>Page 55</td>
<td>[Large-scale mixed-use developments in the Norwich Policy Area are provided…] in a major urban extension in the Old Catton, Sprowston, Rackheath, Thorpe St...</td>
</tr>
<tr>
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</tr>
<tr>
<td>paragraph 6.3</td>
<td></td>
<td>Andrew growth triangle, and …[at Cringleford, Easton/Costessey, Hethersett, Long Stratton and Wymondham.]</td>
</tr>
</tbody>
</table>
| 06 Policies for Places, Policy 9 | Page 56     | 2nd bullet point  
  • Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle: 7,000 dwellings by 2026 continuing to grow to around 10,000 dwellings eventually  
  8th bullet point  
  • Broadland smaller sites in the NPA: 2,000 dwellings |
| 06 Policies for Places, Policy 9 | Page 57     | Final bullet point  
  • [new employment development to serve local needs of major growth locations] including around 25ha of new employment land at Rackheath |
| 06 Policies for Places, Policy 9 | Page 57     | Paragraph 6.7 to read  
  The Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle incorporates land at Rackheath promoted for an eco-community under the government’s eco-towns programme and development of the rest of the area will be expected to reflect similar high standards. |
| Para 6.12                      | Page 58     | 4th bullet point  
  • Rackheath: around 25ha of new employment land for a range of employment uses to strengthen the employment role of this location and provide local opportunities for the new community in this area |
<p>| Diagram after the end of the paragraph 6.12 – Relationship between strategic growth locations | Page 59     | Add notation to the diagram to include the area of the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’ as a location for both ‘Major housing growth and associated facilities’ and ‘Strategic employment locations’ (see plan attached as Appendix 3) |</p>
<table>
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</table>
| within the Norwich Policy Area |              | Add notation to show additional locations for ‘Proposed housing in unspecified locations in the Norwich Policy Area’ as follows:  
  • 10,000 new houses to the north east of the urban area within the Norwich policy area,  
  • 2,000 houses in the NPA part of Broadland.  
Add notation to show the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’  
(See plan attached as Appendix 4) |
| Diagram after para 6.12, entitled “Main Housing Allocations” | Page 60 | [Major growth] in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, and [at Cringleford, Easton/Costessey, Hethersett, Long Stratton and Wymondham will be masterplanned as attractive, well-serviced, integrated, mixed use development using a recognised design process giving local people an opportunity to shape development.] |
| Policy 10 -- Locations for major new or expanded communities in the Norwich Policy Area: first sentence | Page 63 | Heading and paragraphs as follows:  
**Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle**  
This location will deliver an urban extension extending on both sides of the Northern Distributor Road. Complete delivery of the extension is dependent on implementation of the Northern Distributor Road. However, there is scope for partial delivery, the precise extent of which will be assessed through the Area Action Plan. The structure of the local geography suggests that this new community will take the form of a series of inter-related new villages or quarters and will include:  
• at least 7,000 dwellings (rising to a total of at least 10,000 dwellings after 2026)  
• a district centre based around an accessible ‘high street’ and including a new library, education and |
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</thead>
<tbody>
<tr>
<td>health facilities. This may be provided by building on the proposed centre at Blue Boar Lane or by the creation of a second district centre elsewhere in the Growth Triangle. The development will also require new local centres</td>
<td></td>
<td>[N.B. the words in square brackets are included for clarification purposes only]</td>
</tr>
<tr>
<td>• new pre-school provision and up to six new primary schools plus a new secondary school with an initial phase to open as early as possible. To facilitate early provision the early phases of development will concentrate on family housing</td>
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<td>• new employment allocations for local needs including expansion of the Rackheath employment area</td>
<td></td>
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</tr>
<tr>
<td>• retention of existing important greenspaces and significant levels of heathland re-creation to provide stepping stones to link Mousehold Heath to the surrounding countryside. Building design including, for example, appropriate use of ‘green roofs’ will help provide linkage between green spaces</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• restoring and conserving historic parkland and important woodland. A significant area north of Rackheath will be provided as green space to act as an ecological buffer zone and ensure no significant adverse impacts on the Broads SAC, Broadland SPA and Broadland Ramsar site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Bus Rapid Transit to the city centre, possibly via Salhouse Road and Gurney Road, and a choice of safe and direct cycle routes to the centre</td>
<td></td>
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</tr>
<tr>
<td>• safe and direct cycle and pedestrian routes, and orbital bus services, to Broadland Business Park, Rackheath employment area, airport employment areas and to the surrounding countryside</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• new rail halts at Rackheath and Broadland Business Park</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• permeability and community integration across the Northern Distributor Road and with existing communities. This will be crucial for the successful development of the area</td>
<td></td>
<td></td>
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<tr>
<td>• a new household waste recycling centre.</td>
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<tr>
<td>A single co-ordinated approach will be required across</td>
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<td></td>
<td>[N.B. the words in square brackets are included for clarification purposes only]</td>
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<tr>
<td></td>
<td></td>
<td>the whole area. This will be provided through the preparation of an Area Action Plan (or any future equivalent process). More detailed masterplanning will be required for each quarter.</td>
</tr>
<tr>
<td>Policy 10: Para 6.15 Page 66</td>
<td></td>
<td>The major urban extension in the Old Catton, Sprowston, Rackheath, and Thorpe St Andrew growth triangle will provide a concentration of growth which can support local services, facilities, and infrastructure including secondary education, high quality public transport links and significant green infrastructure. An Area Action Plan and a sustainable development code are being developed. The growth triangle is proposed to accommodate 10,000 dwellings after 2026. A large part of the development at Rackheath was promoted as an eco-community under the previous Government’s eco-towns programme.] The Rackheath low carbon development remains part of this strategy.</td>
</tr>
<tr>
<td>Para 6.16 second line Page 66</td>
<td></td>
<td>[This makes a] similar [large-scale urban expansion inappropriate.]</td>
</tr>
<tr>
<td>Para 6.19 Page 66</td>
<td></td>
<td>[In particular it is necessary to allow] significant development in the growth triangle and [the full implementation of the remainder of the Norwich Area Transportation Strategy. The completion of appropriate improvements at Postwick junction would allow for some development] in the Old Catton, Sprowston, Thorpe St Andrew growth triangle [in advance of the NDR] (see supporting text for Policy 20).</td>
</tr>
<tr>
<td>Para 6.20 fourth sentence Page 67</td>
<td></td>
<td>[The growth] in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew area [will require the implementation of bus priority routes into the city centre including] a [Bus Rapid Transit] route which may be via Gurney Road/Salhouse Road.</td>
</tr>
<tr>
<td>Paragraph 6.22 Page 67</td>
<td></td>
<td>A new secondary school is needed to serve the new community in the north east. [The form and location of secondary provision for growth in the west and south west is] more [complex and yet to be determined.]</td>
</tr>
<tr>
<td>Diagram following policy 10, entitled “Green infrastructure” Page 69</td>
<td></td>
<td>Add notation to show the ‘Growth location’ and ‘Priority areas for Green Infrastructure’ to the northeast of the urban area. Add notation to show priority corridor A from Norwich to</td>
</tr>
<tr>
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</tbody>
</table>
| priority areas supporting key growth locations” |  | the Broads.  
(see plan attached as Appendix 5) |
<p>| Policy 12: The remainder of the Norwich urban area, including the fringe parishes: 1st paragraph | Page 74 | [It will be expanded] through significant growth in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, and smaller [urban extensions at Cringleford, and Easton/Costessey (Policy 10).] |
| Policy 15 Service Villages third paragraph | Page 84 | [In addition to the settlements above, Easton] and Rackheath [have equivalent status to a Service Village while providing a location for significant housing growth.] |
| Policy 19, The hierarchy of centres Point 3. | Page 89 | [New district centres/high streets to be established] within the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, [at Blue Boar Lane, Sprowston and Hall Road, Norwich.] The Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle will be served by a district centre. This may be provided by building on the proposed district centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Triangle as determined through the Area Action Plan for the Growth Triangle. |
| Paragraph 6.77 | Page 90 | [The proposed large-scale housing areas will provide for shops and services to meet local needs where they are not able to benefit from existing centres.] The Old Catton, Rackheath, Sprowston and Thorpe St Andrew growth triangle in particular will be sufficiently large to require a district centre. Preferably this will include a food store as an anchor and sufficient leisure and ancillary activities to provide for the attraction of a range of trips. This may be through building on the proposed centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Growth Triangle. This will be determined through the Area Action Plan for the area. |
| 07 Implementation and monitoring, Paragraph 7.16 and table below | Page 95 | See MM1 in Appendix 1 |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Para 7.17</td>
<td>Page 95</td>
<td>Broadland District Council is committed to preparing an Area Action Plan (AAP) for the growth triangle. As part of the preparation of this AAP there will be an investigation of any potential that may exist for further growth to take place (in addition to that shown in table 1 above) without confirmation of the delivery of the NDR. This will include testing whether interim schemes and/or alternatives to the NDR could help to facilitate growth without compromising the spatial vision and objectives of the JCS. Therefore, the analysis would need to cover capacity of all infrastructure, not just road capacity, the implications of particular sites, and the nature of the proposed development. [It will be essential that the growth is delivered in accordance with the overall strategy, taking account of its wider impact across the Norwich area, including a full range of infrastructure provision, services and high-quality public transport and walking / cycling provision.]</td>
</tr>
<tr>
<td>Para 7.18</td>
<td>Page 96</td>
<td>[Development beyond the pre-NDR threshold established through the AAP process] will not be possible without a commitment to the NDR. If it becomes clear that there is no possibility of the timely construction of the NDR, a review of the JCS proposals for the growth triangle [and the implications for the strategy as a whole would be triggered.]</td>
</tr>
<tr>
<td>New text inserted following Para 7.18</td>
<td>Page 96</td>
<td>See MM2 in Appendix 1</td>
</tr>
<tr>
<td>Appendix 5</td>
<td>Page 107</td>
<td>Insert map showing the area of the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’(see plan attached at Appendix 6)</td>
</tr>
<tr>
<td>Appendix 6</td>
<td>Pages 108-111</td>
<td>Insert following note onto each of the first four pages of App 6 (as per Inspector's modification MM3 in Appendix 1): This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes</td>
</tr>
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<td>[N.B. the words in square brackets are included for clarification purposes only]</td>
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<td></td>
<td>assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.</td>
</tr>
<tr>
<td>Appendix 6 housing trajectory -- table entitled “Growth locations”</td>
<td>Page 113</td>
<td>See MM4 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 6a to be inserted after Appendix 6</td>
<td>-</td>
<td>See MM5 in Appendix 1</td>
</tr>
<tr>
<td>Appendix 7</td>
<td>Pages 114-147</td>
<td>See MM6 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 7a to be inserted after Appendix 7</td>
<td>-</td>
<td>See MM7 in Appendix 1</td>
</tr>
<tr>
<td>New Appendix 8a to be inserted after Appendix 8</td>
<td>-</td>
<td>See MM8 in Appendix 1</td>
</tr>
<tr>
<td>Policies maps amending the Broadland Proposals* Map</td>
<td>N/A</td>
<td>All instances of the ‘Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle’ boundary, hatching and notation on the Amended Proposals* Map for Joint Core Strategy and the ‘Changes to Local Plan Proposals* Map for Joint Core Strategy’ for Old Catton (32A), Rackheath (33), Rackheath (34), Salhouse – Station Road (38), Spixworth (40), Sprowston (41A), (41D), (41E), Thorpe End (19), Thorpe St Andrew (44A), (44B), (44D), (44F). (* in line with the Town and Country Planning (Local Planning) (England) Regulations 2012, Proposals maps are now known as Policies maps)</td>
</tr>
</tbody>
</table>
# Main Modifications

The modifications below are expressed either in the conventional form of strikethrough for deletions and underlining for additions of text, or by specifying the modification in words in *italics*.

The page numbers and paragraph numbering below refer to the combined submission Plan with the JCS [SDJCS 1], and do not take account of the deletion or addition of text.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM1</td>
<td>95</td>
<td>Para 7.16 and table below</td>
<td>Make changes attached as MM1</td>
</tr>
<tr>
<td>MM2</td>
<td>96</td>
<td>New section Paras 7.19-20 and Policies 21 and 22</td>
<td>Insert new section, as attached as MM2</td>
</tr>
<tr>
<td>MM3</td>
<td>108</td>
<td>Appendix 6</td>
<td>Insert following note onto each of the first four pages of App 6: This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.</td>
</tr>
<tr>
<td>MM4</td>
<td>113</td>
<td>Table headed Growth Locations</td>
<td>Make changes attached at MM4</td>
</tr>
<tr>
<td>MM5</td>
<td>-</td>
<td>-</td>
<td>Insert new Appendix 6a, following Appendix 6, as attached at MM5</td>
</tr>
<tr>
<td>MM6</td>
<td>114 - 147</td>
<td>Appendix 7</td>
<td>Make changes attached at MM6</td>
</tr>
<tr>
<td>MM7</td>
<td>-</td>
<td>New</td>
<td>Insert new Appendix 7a, following Appendix 7, as...</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

<table>
<thead>
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<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
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<tbody>
<tr>
<td>MM8</td>
<td>-</td>
<td>section</td>
<td>attached at MM7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New section</td>
<td>Insert new Appendix 8a, following Appendix 8, as attached at MM8</td>
</tr>
</tbody>
</table>

Please note - where large new sections are inserted (see MM2, 5, 7 and 8) the additional text is not underlined.
7.16 Pending clarification of the NDR’s delivery or otherwise, the existing commitment of 1400 dwellings in the Sprowston Fringe can take place without improvements to Postwick Junction. Subject to acceptable improvements to Postwick junction (in the form of Postwick Hub or a suitable alternative) there is significant potential for further development in the growth triangle before confirmation of the delivery of the NDR. The table below summarises the current understanding of this potential.

<table>
<thead>
<tr>
<th>Location</th>
<th>Level of growth supported by current evidence</th>
<th>Constrained development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth Triangle</td>
<td>At least 1600 dwellings (plus 200 exemplar at Rackheath prior to Postwick junction improvements)</td>
<td>New employment allocation at Rackheath</td>
</tr>
<tr>
<td>Smaller sites in Broadland NPA</td>
<td>Delivery of the smaller sites allowance will be dealt with on a site by site basis</td>
<td></td>
</tr>
<tr>
<td>Broadland Business Park</td>
<td>Development of existing allocation and new allocation (approx 18ha incl c50,000m2 B1)</td>
<td></td>
</tr>
<tr>
<td>Airport area</td>
<td></td>
<td>New employment allocation</td>
</tr>
</tbody>
</table>

Insert the following text:

7.16 Pending clarity on Postwick Hub’s and the NDR’s delivery, the table below summarises the current understanding of development potential offered by the strategic locations in the Broadland NPA as at 2013. The delivery of the smaller sites allowance in the Broadland NPA will be dealt with on a site by site basis as the dependence on Postwick junction and the NDR will vary with location.

| Development that can come forward in advance of improvements to Postwick Junction: |
|---------------------------------|----------------------------------------------------------------------------------|
| Growth Triangle                 | 1440 committed dwellings in the Sprowston Fringe                                 |
| Rackheath                       | 200 dwellings on the proposed exemplar development at                              |
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th></th>
<th>Rackheath (in addition to 94 existing consented dwellings)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Further development that can come forward following improvements to Postwick Junction and in advance of confirmation of delivery of the NDR:</strong></td>
<td></td>
</tr>
<tr>
<td>Growth Triangle</td>
<td>At least 1600 dwellings</td>
</tr>
<tr>
<td>Broadland Business Park</td>
<td>Development of existing allocation and new allocation (approx. 18ha including c50,000m² B1)</td>
</tr>
<tr>
<td><strong>Development that cannot come forward until confirmation of delivery of the NDR:</strong></td>
<td></td>
</tr>
<tr>
<td>Growth Triangle</td>
<td>All remaining housing in the Growth Triangle and new employment allocation at Rackheath</td>
</tr>
<tr>
<td>Airport Area</td>
<td>New employment allocation</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

MM2

<table>
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<th>Policy/Paragraph</th>
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</thead>
<tbody>
<tr>
<td>MM2</td>
<td>96</td>
<td>New section Paras 7.19-20 and Policies 21 and 22</td>
</tr>
</tbody>
</table>

Insert new section as follows:

**Implementation and delivery within the Broadland part of the Norwich Policy Area**

7.19 Following the adoption of the Joint Core Strategy in March 2011 a court judgment remitted parts of the previously adopted plan for further consideration. This judgment remitted specific elements of the proposals within the Broadland part of the Norwich Policy Area and in particular: a) the Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (including employment growth at Rackheath but excluding employment land at Broadland Business Park and the airport); and b) 2000 homes proposed on smaller sites throughout the Broadland part of the Norwich Policy Area. These proposals were resubmitted for further examination, and policies 21 and 22 were necessary in order to ensure the soundness of this part of the JCS. For the avoidance of doubt, policies 21 and 22 below apply only to the proposals previously remitted by the Court order.

7.20 Between the original adoption of the JCS and consideration of the remitted proposals, key infrastructure items serving the Broadland part of the NPA were not progressed at the rate envisaged in the original JCS. Because of this, and the further scrutiny of the remitted elements of the plan in the light of updated government guidance about the housing land supply and deliverability of the plan proposals, it was considered necessary to strengthen policy with regard to a positive approach to sustainable development, monitoring and housing land supply. Progress regarding delivery of housing land will be rigorously monitored against targets. If monitoring reveals that the Broadland part of the NPA will significantly under deliver in terms of a 5-year housing land supply (plus the “additional buffer” required in national policy), then action will be taken to address this as set out in policy 22.

**Policy 21: Implementation of proposals in the Broadland part of the Norwich Policy Area**

When considering development proposals in their part of the Norwich Policy Area Broadland District Council will take a positive approach that reflects the presumption in favour of sustainable development contained in the National Planning Policy Framework. It will always work proactively with applicants jointly to find solutions which mean that proposals can be approved wherever possible, and to secure development that improves the economic, social and environmental conditions in the area.
Planning applications that accord with the policies in this Local Plan (and, where relevant, with policies in neighbourhood plans) will be approved without delay, unless material considerations indicate otherwise.

Where there are no policies relevant to the application or relevant policies are out of date at the time of making the decision then the Council will grant permission unless material considerations indicate otherwise – taking into account whether:

- Any adverse impacts of granting permission would significantly and demonstrably outweigh the benefits, when assessed against the policies in the National Planning Policy Framework taken as a whole; or
- Specific policies in that Framework indicate that development should be restricted.

**Policy 22: Action to ensure the delivery of housing land in the Broadland part of the Norwich Policy Area**

In addition to the JCS review “trigger” set out in paragraph 7.18, if any Monitoring Report (MR) produced after two full years from the adoption of this part-JCS Local Plan demonstrates that there is a significant shortfall (as defined below) in the 5-year supply of housing land (plus the “additional buffer” required in current national policy) affecting the Broadland part of the Norwich Policy Area (NPA), then the Councils will take the course of action specified below to address the identified shortfall.

The Councils will consider that a significant shortfall has arisen if the MR (produced annually) shows there to be less than 90% of the required deliverable housing land (as defined in current national policy).

In the event of an identified shortfall, the Councils will produce a short, focussed Local Plan which will have the objective of identifying and allocating additional locations within the whole NPA area for immediately deliverable housing land to remedy that shortfall, in accordance with the settlement hierarchy set out in paragraph 6.2 of the JCS. The Local Plan will cover such a time period as may reasonably be considered necessary for the delivery delay or shortfall (however caused) to be resolved.
Growth locations (excluding the Broadland part of the Norwich Policy Area)

This table illustrates the trajectory as anticipated in 2010 for the Plan excluding figures for the Broadland part of the Norwich Policy Area. It is now out of date. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the Annual Monitoring Report.

<table>
<thead>
<tr>
<th>District</th>
<th>Total number of units per year</th>
<th>Average annual build rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remainder of Old Catton, Sprowston, Thorpe St Andrews Growth Triangle outside NPA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional small sites around Broadland NPA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional sites around rural Broadland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norwich (3,000)</td>
<td>250 250 250 250 250 250 250 250 250 250 250 250 250 250 250 250 250</td>
<td>3,000 176</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>525 655 875 950 1,039 1,128 978 898 778 778 778 778 683 10,065 592</td>
<td></td>
</tr>
<tr>
<td>Wymondham (2,200)</td>
<td>185 185 185 185 185 185 185 185 185 185 185 185 185 185 185 185 185</td>
<td></td>
</tr>
<tr>
<td>Long Stratton (1,800)</td>
<td>50 140 230 230 230 230 230 230 230 230 1,800 200</td>
<td></td>
</tr>
<tr>
<td>Hethersett (1,000)</td>
<td>90 175 175 175 175 175 175 175 175 175 1,000 125</td>
<td></td>
</tr>
<tr>
<td>Ring elmford (1,200)</td>
<td>50 100 125 125 125 125 125 125 125 125 125 125 50 1,200 109</td>
<td></td>
</tr>
<tr>
<td>Eaton Costessey (1,000)</td>
<td>50 90 175 175 175 175 175 100 60</td>
<td></td>
</tr>
<tr>
<td>Additional smaller sites around South Norfolk NPA (1,800)</td>
<td>150 150 150 150 150 150 150 150 150 150 1,800 150</td>
<td></td>
</tr>
<tr>
<td>Additional sites around Rural South Norfolk</td>
<td>84 84 84 84 83 83 83 83 83 83 83 83 83 83 83 83 83 83 83 1,000 83</td>
<td></td>
</tr>
<tr>
<td>Additional urban capacity in rural South Norfolk</td>
<td>6 6 6 6 6 6 6 6 5 5 5 5 5 5 5 5 65 5</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>840 320 320 320 320 1,885 960 1,020 1,020 2,004 1,020 1,020 1,020 1,020 1,020 1,020 1,020 1,020 1,020 1,020 1,020 1,020</td>
<td>13715 2,871 1143</td>
</tr>
</tbody>
</table>
### Appendix 1 – Main Modifications

#### MM5

<table>
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<th>Main Modification</th>
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<tr>
<td>MM5</td>
<td>-</td>
<td>-</td>
<td>Insert new Appendix 6a, to follow Appendix 6</td>
</tr>
</tbody>
</table>

#### Appendix 6a

Trajectory of delivery of Homes expected from previously remitted Growth Locations in Broadland part of NPA

<table>
<thead>
<tr>
<th></th>
<th>14/15</th>
<th>15/16</th>
<th>16/17</th>
<th>17/18</th>
<th>18/19</th>
<th>19/20</th>
<th>20/21</th>
<th>21/22</th>
<th>22/23</th>
<th>23/24</th>
<th>24/25</th>
<th>25/26</th>
<th>TOTAL</th>
<th>Av build</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rackheath</td>
<td>77</td>
<td>77</td>
<td>70</td>
<td>185</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>230</td>
<td>2249</td>
<td>187</td>
</tr>
<tr>
<td>Remainder of Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (inside NDR)</td>
<td>20</td>
<td>163</td>
<td>234</td>
<td>373</td>
<td>435</td>
<td>440</td>
<td>515</td>
<td>590</td>
<td>530</td>
<td>530</td>
<td>530</td>
<td>497</td>
<td>4857</td>
<td>405</td>
</tr>
<tr>
<td>Additional small sites around Broadland NPA</td>
<td>98</td>
<td>148</td>
<td>161</td>
<td>266</td>
<td>328</td>
<td>300</td>
<td>225</td>
<td>150</td>
<td>150</td>
<td>25</td>
<td>0</td>
<td>2001</td>
<td>167</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>195</td>
<td>388</td>
<td>465</td>
<td>824</td>
<td>993</td>
<td>970</td>
<td>970</td>
<td>970</td>
<td>910</td>
<td>910</td>
<td>785</td>
<td>727</td>
<td>9107</td>
<td>759</td>
</tr>
</tbody>
</table>

This trajectory illustrates delivery anticipated at July 2013. It should not be summed with figures produced in Appendix 6. For up to date information please see the Annual Monitoring Report.
Appendix 7: Implementation Framework and Critical Path outside of the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date, including in the growth triangle where 3,000 dwellings are proposed after 2026. This table was correct at late 2010 and relates only to infrastructure that is not required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website. Updated information on infrastructure schemes needed in part to support some element of the previously remitted growth proposals in the Broadland part of the NPA is available in Appendix 7a.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

**Priority 1 - Infrastructure** is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

**Priority 2 - Infrastructure** is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.
Priority 3 - Infrastructure is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals.

Table 1 – Infrastructure Framework shows infrastructure requirements to support growth across the JCS period.
**Table 1 – Infrastructure Framework**

**Infrastructure Framework: Priority 1 projects 2008 - 2016**

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

**Waste Water**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade solutions subject to ongoing discussions with Anglian Water</td>
<td>Rackheath</td>
<td>Developer</td>
<td>tba</td>
<td>Developer/AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP3</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>42.9</td>
<td>Developer/AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP4</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>5</td>
<td>Developer/AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP5</td>
<td>Wymondham upgrade (Option 2)</td>
<td>Wymondham</td>
<td>Anglian Water</td>
<td>13.8</td>
<td>Developer/AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP6</td>
<td>Rackheath (Option 2)</td>
<td>Rackheath</td>
<td>Anglian Water</td>
<td>48</td>
<td>Developer/AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

**Green Infrastructure**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI 16</td>
<td>Retention and recreation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe–St Andrew Growth Triangle</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe–St Andrew Growth Triangle</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
### Electricity

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1</td>
<td>New primary sub-station on existing site (Hurricane Way)</td>
<td>Expansion of the employment area - airport business park</td>
<td>EDF energy</td>
<td>5.5</td>
<td>70% AMP • 30% Developer contributions</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>

### Transportation

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment)
and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T1</td>
<td>Norwich Northern Distributor Road</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle ● Broadland: Smaller sites in the NPA (2000 dwellings) ● Norwich Area Transportation Strategy including delivery of BRT ● Broadland Business Park ● Airport employment allocation</td>
<td>Norfolk County Council</td>
<td>106.2</td>
<td>DfT £67.5m ● Growth Point ● Developer Contributions ● Norfolk County Council</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T2a</td>
<td>Postwick Junction improvements</td>
<td>Overall Scale of Growth. Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle ● Broadland: Smaller sites in the NPA (2000 dwellings) ● Norwich Area Transportation Strategy including delivery of BRT ● Broadland Business Park ● Airport employment allocation</td>
<td>Norfolk County Council</td>
<td>19</td>
<td>DfT ● Growth Point 3.5 ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
</tbody>
</table>
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Body</th>
<th>£m</th>
<th>Dates by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norfolk County Council</td>
<td>6</td>
<td>Developer contributions</td>
</tr>
<tr>
<td>Norfolk County Council</td>
<td>30</td>
<td>Developer contributions</td>
</tr>
<tr>
<td>Norfolk County Council</td>
<td>30</td>
<td>Norfolk County Council, DfT, Growth Point, Developer contributions</td>
</tr>
<tr>
<td>Norfolk County Council</td>
<td>5</td>
<td>Growth Point, Developer contributions</td>
</tr>
</tbody>
</table>

| T2b | Postwick Park and Ride Junction improvements | Postwick, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | Norfolk County Council | 6 | Developer contributions | 2016 |
| T4 & T17 | Thickthorn junction improvement including bus priority and park and ride improvements | Wymondham, Hethersett and Cringleford Growth Locations | Norfolk County Council/Highways Agency | 30 | Developer contributions | 2016 (scheme expected to be phased) |
| T5 | Longwater junction improvements | West Growth Location | Norfolk County Council/Highways Agency | 30 | Norfolk County Council, DfT, Growth Point, Developer contributions | 2016 |
| T6 | Norwich Research Park transport infrastructure phase 1 | Norwich Research Park | Norfolk County Council/Highways Agency | 5 | Growth Point, Developer contributions | 2016 |
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T7</td>
<td>Bus improvements Newmarket Road</td>
<td>Wymondham, Hethersett and Cringleford ● Norwich Area Transportation Strategy including delivery of BRT</td>
<td>Norfolk County Council</td>
<td>0.4</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 1</td>
<td>Broadland Fringe Growth (subject to location of growth)</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus Rapid Transit via Dereham Road - Phase 1</td>
<td>West Growth Location</td>
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<td>1.25</td>
<td>Growth Point</td>
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## Appendix 1 – Main Modifications

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<td>T11</td>
<td>Bus Rapid Transit via Salhouse Road and Gurney Road – Phase 1</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
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<td>Bus Rapid Transit via Norwich airport A140 to City centre – Phase 1</td>
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<td>T13</td>
<td>Bus priority route via Hethersett Lane/ Hospital/ Norwich Research Park/ University of East Anglia/ City centre</td>
<td>Wymondham, Hethersett and Cringleford Growth Location &amp; NRP</td>
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<td>T15</td>
<td>Development Link—Broadland Business Park to Salhouse Road</td>
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<td>Developer Lead</td>
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<td>Developer contributions</td>
<td>2016</td>
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<td>Barrack Street</td>
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<td>N/A</td>
<td>Lady Julian Bridge</td>
<td>City centre</td>
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<td>Growth Point, S106, EEDA</td>
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<td>NATS</td>
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<tr>
<td>N/A</td>
<td>St Augustine’s Gyratory</td>
<td>Norwich Area Transportation Strategy including delivery of BRT, City centre bus enhancements</td>
<td>Norfolk County Council/ Norwich City Council</td>
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**Totals**

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</table>
**Infrastructure Framework: Priority 1 projects 2016 -2021**

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

---

**Waste Water**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

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<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Developer</td>
<td>TBA</td>
<td>Developer/ AW provision</td>
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<td>SP2</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
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<td>Developer/ AW provision</td>
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<td>Water Cycle Study Stage 2b</td>
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<td>SP7</td>
<td>Whitlingham Upgrade (Option 1)</td>
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<td>Wymondham upgrade (Option 2)</td>
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<td>Developer/ AW provision</td>
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</table>
**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

**Electricity**

*The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.*

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<tr>
<td>U2</td>
<td>New primary substation on new site (Norwich Airport north)</td>
<td>Expansion of the employment area - airport business park ● Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>EDF energy</td>
<td>6.3</td>
<td>Developer contributions</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>U3</td>
<td>New grid sub-station on existing sites (Norwich East)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>EDF energy</td>
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<td>100% AMP</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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</table>
**Green Infrastructure**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment and Utilities). All potable water improvements are delivered through the AMP process and are not included in this table.

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<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth in particular Wymondham, Hethersett and Cringleford Growth Locations</td>
<td>Local authorities/ Developers</td>
<td>tba</td>
<td>Local authorities/ Developer contribution</td>
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<td>Green Infrastructure Delivery Plan</td>
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<tr>
<td>GI 16</td>
<td>Retention and recreation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe—St—Andrew Growth Triangle</td>
<td>Local authorities/ Developers</td>
<td>tba</td>
<td>Local authorities/ Developer contribution</td>
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<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe—St—Andrew Growth Triangle</td>
<td>Local authorities/ Developers</td>
<td>tba</td>
<td>Local authorities/ Developer contribution</td>
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<tr>
<td>T3</td>
<td>Long Stratton bypass A140 including improvement at Hempnall crossroads</td>
<td>Long Stratton Growth Locations</td>
<td>Developer / Norfolk County Council</td>
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<td>Developer contributions</td>
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<td>T6</td>
<td>Norwich Research Park transport infrastructure phase 2</td>
<td>Norwich Research Park</td>
<td>Norfolk County Council/ Highways Agency</td>
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<td>T7</td>
<td>Bus priority - approach to Harford Junction</td>
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<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
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<td>Growth Point ● LTP ● Developer contributions</td>
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<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 2</td>
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<td>T9</td>
<td>Bus improvements Dereham Road phase 2</td>
<td>West Growth Locations</td>
<td>Norfolk County Council/ Norwich City Council</td>
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<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 2</td>
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<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
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<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road phase 2</td>
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<td>Bus Rapid Transit via Norwich airport A140 to City centre – Phase 2</td>
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<td>Andrew Growth triangle</td>
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### Infrastructure Framework: Priority 1 projects 2021 -2026

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

### Waste Water

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<td>Sewerage upgrade—solutions subject to ongoing discussions with Anglian Water</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe—St Andrew Growth triangle</td>
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<td>tba</td>
<td>Developer/AW-provision</td>
<td>2026</td>
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<tr>
<td>SP2</td>
<td>Sewerage upgrade -solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
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</table>
| **SP12** | Wymondham upgrade (Option 2) | West growth locations | Anglian Water | 0.5
|   |   |   | Developer/ AW provision | 2026
|   | Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water | Long Stratton | Anglian Water | Tba
|   |   |   | Developer/ AW provision | 2026

Water Cycle Study Stage 2 B
# Potable Water

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

# Electricity

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<td>U4</td>
<td>New primary substation on new site (Sprowston/Rackheath)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrews growth triangle</td>
<td>EDF energy</td>
<td>4.3</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>U5</td>
<td>Replacement of transformers and switchgear in existing site (Hapton)</td>
<td>Long Stratton</td>
<td>EDF energy</td>
<td>2.53</td>
<td>83% AMP ● 17% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
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<tr>
<td>U6</td>
<td>Replacement of transformers and switchgear in existing site (Wymondham)</td>
<td>SW Growth location</td>
<td>EDF energy</td>
<td>2.53</td>
<td>67% AMP ● 33% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
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### Green Infrastructure

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<td>GI-16</td>
<td>Retention and recreation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>-</td>
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<td>2026</td>
<td>Green Infrastructure Delivery Plan</td>
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## Transportation

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<tbody>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 3</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>6</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021 - 2026</td>
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<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 3</td>
<td>Broadland Fringe Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
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<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
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<td>T9</td>
<td>Bus improvements Dereham Road phase 3</td>
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<td>Norfolk County Council/ Norwich Council City</td>
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<td>Growth Point ● LTP ● Developer contributions</td>
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<tr>
<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 3</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
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<td>Norfolk County Council • DfT • Growth Point • Developer contributions</td>
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<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road phase 3</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
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<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre - Phase 3</td>
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<td>Norfolk County Council/ Norwich City Council</td>
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<td>Norfolk County Council • DfT • Growth Point • Developer contributions</td>
<td>2021-2026</td>
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<td><strong>Totals</strong></td>
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</table>
## Infrastructure Framework: Priority 2 projects 2008-2016

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
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<tbody>
<tr>
<td>ED3</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2011</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED4</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
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The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

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<th>Promoter/Delivery body</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>HC1</td>
<td>GPs Surgery (3 GPs)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.03</td>
<td>Health Authority / Developer contribution</td>
<td>2011</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC2</td>
<td>Dentists surgery (4 Dentists)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.25</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC6</td>
<td>Expansion of existing facilities (2 GPs and 2 Dentists)</td>
<td>Broadland Elsewhere</td>
<td>Health Authority</td>
<td>0.9</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC12</td>
<td>Expansion of existing facilities (7 GPs and 7 Dentists)</td>
<td>South Norfolk Elsewhere</td>
<td>Health Authority</td>
<td>3.5</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
<td>Health Authority</td>
<td>10</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
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### Green infrastructure

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.

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<th>Ref</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
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<tbody>
<tr>
<td>N/A</td>
<td>Wensum River Parkway</td>
<td>Overall scale of growth</td>
<td>HEART/ Norwich City Council</td>
<td>0.07</td>
<td>Growth Point</td>
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<td>Green Infrastructure Steering Group</td>
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<tr>
<td>N/A</td>
<td>Catton Park visitor centre and park improvements</td>
<td>Overall scale of growth</td>
<td>Catton Park Trust/ Norfolk County Council</td>
<td>0.37</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>Green Infrastructure Steering Group</td>
</tr>
<tr>
<td>N/A</td>
<td>Whitlingham Country Park Access Improvements</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
<td>0.12</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>Green Infrastructure Steering Group</td>
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<tr>
<td>N/A</td>
<td>Wooded ridge</td>
<td>Overall scale of growth</td>
<td>Norwich City Council</td>
<td>0.04</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>Green Infrastructure Steering Group</td>
</tr>
<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
<td>Overall scale of growth</td>
<td>Various</td>
<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
<td>2016</td>
<td>Green Infrastructure Steering Group</td>
</tr>
</tbody>
</table>

**Totals** | 18.36 |
## Infrastructure Framework: Priority 2 projects 2016-2021

### Education

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

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<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED1</td>
<td>60-place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED1</td>
<td>60-place pre-school (co-location with community space)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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</tbody>
</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
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<th>Source</th>
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</thead>
<tbody>
<tr>
<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
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<tr>
<td>ED7</td>
<td>30 place pre-school</td>
<td>Wymondham</td>
<td>Norfolk County Council</td>
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<td>Developer contribution</td>
<td>2021</td>
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<tr>
<td>ED7</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Wymondham</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED7</td>
<td>60 place pre-school</td>
<td>Hethersett</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED7</td>
<td>60 place pre-school</td>
<td>Easton</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>26</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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## Phase 1

<table>
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<th>Estimated delivery dates by</th>
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</thead>
<tbody>
<tr>
<td>ED10</td>
<td>Expanded secondary school provision</td>
<td>Wymondham, Hethersett, Cringleford, Costessey / Easton</td>
<td>Norfolk County Council</td>
<td>10</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study and ongoing assessment of options</td>
</tr>
</tbody>
</table>

### Healthcare

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

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<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>HC3</td>
<td>Expansion of existing facilities (6 GPs and 5 Dentists)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>4.5</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC4</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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### Appendix 1 – Main Modifications

<table>
<thead>
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<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>HC7</td>
<td>Expansion of existing facilities (3 GPs and 2 Dentists)</td>
<td>Wymondham</td>
<td>Health Authority</td>
<td>1.8</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
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<tr>
<td>HC9</td>
<td>Expansion of existing facilities (1 GP and 1 Dentist)</td>
<td>Hethersett</td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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| HC11 | Expansion of existing facilities (1 GP and 1 Dentist) | Easton / Costessey | Health Authority | 0.55 | Health Authority / Developer contribution | 2021 | Infrastructure Needs and Funding Study |
| HC13 | Hospital bed requirements | Overall scale of growth | Health Authority | 6 | Health Authority / Developer contribution | 2021 | Infrastructure Needs and Funding Study |

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## Infrastructure Framework: Priority 2 projects 2021-2026

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<tr>
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<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
<tr>
<td>ED2</td>
<td>60-place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tbody>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
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<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED6</td>
<td>60 place pre-school co-located with 600sqm combined community centre and library</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Wymondham</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>2FE place primary</td>
<td>Cringleford</td>
<td>Norfolk County Council</td>
<td>2.3</td>
<td>Developer contribution</td>
<td>2026</td>
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<tr>
<td>ED8</td>
<td>1 FE place primary</td>
<td>Hethersett</td>
<td>Norfolk County Council</td>
<td>2.3</td>
<td>Developer contribution</td>
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<table>
<thead>
<tr>
<th>ED8</th>
<th>60 place pre-school</th>
<th>Long Stratton</th>
<th>Norfolk County Council</th>
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<th>Developer contribution</th>
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<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts phase 2</td>
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<td>Norfolk County Council</td>
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<td>Developer contribution</td>
<td>2026</td>
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</tr>
<tr>
<td>ED8</td>
<td>2FE primary with integrated 60 place pre-school co-located with combined community centre and library</td>
<td>Long Stratton</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
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<td>Cringleford</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>1FE primary</td>
<td>Easton</td>
<td>Norfolk County Council</td>
<td>2.5</td>
<td>Developer contribution</td>
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<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED10</td>
<td>Expanded secondary school provision</td>
<td>Wymondham, Hethersett, Cringleford, Costessey / Easton, Long Stratton, rest of South Norfolk</td>
<td>Norfolk County Council</td>
<td>10</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study and ongoing assessment of options</td>
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<tr>
<td>HC5</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC8</td>
<td>Combined surgery (2 GPs and 2 Dentists)</td>
<td>Long Stratton</td>
<td>Health Authority</td>
<td>1.5</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC10</td>
<td>Expansion of existing facilities (1 GP and 1 Dentists)</td>
<td>Cringleford</td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021 - 2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
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</table>

Ref | Scheme | Required growth in: | Promoter/ Delivery body | Total Cost £m | Funding sources | Estimated delivery dates by | Source |
|-----|--------|---------------------|--------------------------|---------------|----------------|-----------------------------|--------|
Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>HC12</th>
<th>Expansion of existing facilities (1 GP)</th>
<th>South Norfolk</th>
<th>Health Authority</th>
<th>0.6</th>
<th>Health Authority / Developer contribution</th>
<th>2026</th>
<th>Infrastructure Needs and Funding Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
<td>Health Authority</td>
<td>12</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>

**Green infrastructure**

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in: for</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
<td>Overall scale of growth</td>
<td>Various</td>
<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
<td>2026</td>
<td>Green Infrastructure Steering Group</td>
</tr>
</tbody>
</table>

| Totals |                                                        |                         |                         | 39.05         | 66.22                                                                   |                            |                                            |

53
The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF1</td>
<td>Community facilities</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe-St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>0.5</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF2</td>
<td>Community facilities</td>
<td>Norwich</td>
<td>Norwich City Council</td>
<td>1</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF3-5</td>
<td>Community facilities</td>
<td>South Norfolk</td>
<td>South Norfolk Council</td>
<td>4</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF1</td>
<td>Community facilities</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe–St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>2</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2016 – 2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF2</td>
<td>Community facilities</td>
<td>Norwich</td>
<td>Norwich City Council</td>
<td>3.05</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF3-5</td>
<td>Community facilities</td>
<td>South Norfolk</td>
<td>South Norfolk Council</td>
<td>3.1</td>
<td>Private companies ● Developers ● Local</td>
<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>

**Totals**

5.50

**Infrastructure Framework: Priority 3 projects 2016-2021**

**Community facilities**

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.
The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI 12</td>
<td>Fire Service</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
<td>tba</td>
<td>Norfolk County Council / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CI13</td>
<td>Ambulance Service</td>
<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
<td>tba</td>
<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CI 1-11</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) ● Norwich (22 officers) ● South</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Norfolk (32 officers)</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>11.40</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>13.40</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Infrastructure Framework: Priority 3 projects 2021-2026

**Community facilities**

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF 1</td>
<td>Community facilities</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe-St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>2</td>
<td>Private companies • Developers • Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF 2</td>
<td>Community facilities</td>
<td>Norwich</td>
<td>Norwich City Council</td>
<td>3.05</td>
<td>Private companies • Developers • Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF 3-5</td>
<td>Community facilities</td>
<td>South Norfolk</td>
<td>South Norfolk Council</td>
<td>3.1</td>
<td>Private companies • Developers • Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in: for</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI 12</td>
<td>Fire Service</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
<td>TBA</td>
<td>Norfolk County Council / Developer Contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CI 13</td>
<td>Ambulance Service</td>
<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
<td>TBA</td>
<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CI 1-11</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) • Norwich (44 officers) • South Norfolk (64 officers)</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer Contribution</td>
<td>2021 - 2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>

| Totals |                                              | 13.4                     |
Appendix 7a: Implementation Framework and Critical Path inside the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date, including in the growth triangle where at least 3,000 dwellings are proposed after 2026. This table was correct at June 2013 and relates only to infrastructure that is required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

**Priority 1 Infrastructure** is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

**Priority 2 Infrastructure** is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.

**Priority 3 Infrastructure** is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure.
Appendix 1 – Main Modifications

Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals.

**Table 1 – Infrastructure Framework** shows infrastructure requirements to support growth across the JCS period.
### Table 1 – Infrastructure Framework

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Waste water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SP1</td>
<td>Sewerage upgrade – Anglian Water propose a north east trunk sewer to manage growth in the north east as a result of the detailed study ‘Water Cycle Study 2B’</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/ Developer</td>
<td>61.6 (across whole period)</td>
<td>AW provision/ Developer</td>
<td>in phases up to 2026</td>
<td>Water Cycle Study Stage 2B</td>
</tr>
<tr>
<td></td>
<td>Green Infrastructure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GI16</td>
<td>Retention and re-creation of Mousehold Heath and link to the surrounding countryside</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/ Developer</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston,</td>
<td>Local Authorities/ Developer</td>
<td>0.21</td>
<td>Local authority/CIL/Developer</td>
<td>2016</td>
<td>Green Infrastructure Delivery</td>
</tr>
</tbody>
</table>

**Infrastructure Framework: Priority 1 projects 2008 – 2016**

The base date for the Strategy is 2008. This table includes projects expected to be delivered from the base date up to 2016 (the first 5 years of delivery post adoption of the non-remitted parts of the JCS)

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.
## Appendix 1 – Main Modifications

### Rackheath and Thorpe St Andrew Growth Triangle

<table>
<thead>
<tr>
<th>Plan</th>
<th>Land contributions</th>
<th>Transportation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transportation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T1</td>
<td>Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Overall scale of growth in particular:</td>
</tr>
<tr>
<td>Norwich Northern Distributor Road</td>
<td></td>
<td>- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Broadland: Smaller sites in the NPA (2000 dwellings) depending on site specifics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Norwich Area Transportation Strategy including delivery of BRT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Airport employment allocation</td>
</tr>
<tr>
<td></td>
<td>Norfolk County Council</td>
<td>107 (spend up to 2016)</td>
</tr>
<tr>
<td></td>
<td>DFT £67.5m /CIL /Norfolk County Council</td>
<td>2016 (continue to 2021)</td>
</tr>
<tr>
<td></td>
<td>NATS</td>
<td></td>
</tr>
<tr>
<td>T2a</td>
<td>Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Overall scale of growth in particular:</td>
</tr>
<tr>
<td>Postwick Junction improvements</td>
<td></td>
<td>- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
</tr>
<tr>
<td></td>
<td>Norfolk County Council</td>
<td>21.0</td>
</tr>
<tr>
<td></td>
<td>DFT funding /Norfolk County Council</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>NATS</td>
<td></td>
</tr>
</tbody>
</table>
### Appendix 1 – Main Modifications

**expanded Postwick Park and Ride**
- Broadland Business Park and expansion

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>T11</td>
<td>Bus Rapid Transit via Salhouse Road and Gurney Road</td>
</tr>
<tr>
<td></td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
</tr>
<tr>
<td></td>
<td>Norfolk County Council/ Norwich City Council</td>
</tr>
<tr>
<td></td>
<td>1.8</td>
</tr>
<tr>
<td></td>
<td>Rackheath PoD (Broadland District Council)/ Norfolk County Council/ DfT/CIL</td>
</tr>
<tr>
<td></td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>NATS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>T15</td>
<td>Completion of local development Link Road</td>
</tr>
<tr>
<td></td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
</tr>
<tr>
<td></td>
<td>Developer Lead</td>
</tr>
<tr>
<td></td>
<td>2.5</td>
</tr>
<tr>
<td></td>
<td>Developer contributions</td>
</tr>
<tr>
<td></td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>NATS</td>
</tr>
</tbody>
</table>

### Infrastructure Framework: Priority 1 projects 2016 -2021

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Waste Water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>

**Waste Water**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - north east trunk sewer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>

### Utilities

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
</tr>
</thead>
</table>

|     | Utilities                                |                         |                          |                |                |                            | Water Cycle Study Stage 2: B |

|     | Utilities                                |                         |                          |                |                |                            | Water Cycle Study Stage 2: B |

|     | Utilities                                |                         |                          |                |                |                            | Water Cycle Study Stage 2: B |

|     | Utilities                                |                         |                          |                |                |                            | Water Cycle Study Stage 2: B |

# 64
### Appendix 1 – Main Modifications

| U2 | New primary substation on new site (Norwich Airport north) | • Airport employment allocation  
• Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | UK Power Networks | 6.3 | UKPN | 2021 | Infrastructure Needs and Funding Study 2009 |
| U3 | New grid sub-station on existing sites (Norwich East) | Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | UK Power Networks | 17 | 100% AMP funded | 2021 | Infrastructure Needs and Funding Study 2009 |

#### Green Infrastructure

| GI 16 | Retention and re-creation of Mousehold Heath to the surrounding countryside | Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle | Local authorities/Developers | 0.033 | Local authority/CIL/On-site design | 2021 | Green Infrastructure Delivery Plan |
| GI 17 | Broads Buffer Zone | Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle | Local authorities/Developers | 0.21 | Local authority/CIL/Developer land contributions | 2021 | Green Infrastructure Delivery Plan |

#### Transport

| T1 | Norwich Northern Distributor Road | Overall scale of growth in particular: Old Catton, Sprowston, | Norfolk County Council | 13 | Norfolk County Council | 2016 to 2021 | NATS |
|
### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Description</th>
<th>Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>T2b</td>
<td>Postwick Park and Ride</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Overall scale of growth in particular:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Norfolk County Council</td>
</tr>
<tr>
<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road</td>
<td>Old Catton, Sprowston,</td>
<td>Norfolk County Council/ Norwich City Council</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rackheath, and Thorpe St</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Andrew Growth triangle</td>
<td></td>
</tr>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston,</td>
<td>Norfolk County Council/ Norwich City Council</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rackheath, and Thorpe St</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Andrew Growth triangle</td>
<td></td>
</tr>
<tr>
<td>T15</td>
<td>Completion of local Development Link Road</td>
<td>Old Catton, Sprowston,</td>
<td>Developer Lead</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rackheath, and Thorpe St</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Andrew Growth triangle</td>
<td></td>
</tr>
</tbody>
</table>

**Infrastructure Framework: Priority 1 projects 2021 -2026**
The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Scale of Growth in Particular</th>
<th>Responsible Party</th>
<th>Delivery Period</th>
<th>Further Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - north east trunk sewer</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/Developer</td>
<td></td>
<td>See 2008-16 period</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Overall scale of growth in particular:</td>
<td>AW provision/Developer</td>
<td></td>
<td>in phases up to 2026</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td></td>
<td></td>
<td>Water Cycle Study Stage 2 B</td>
</tr>
<tr>
<td>U4</td>
<td>New primary substation on new site (Sprowston / Rackheath)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrews growth triangle</td>
<td>UK Power Networks</td>
<td>4.3</td>
<td>UKPN / CIL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Overall scale of growth in particular:</td>
<td></td>
<td></td>
<td>2026</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td></td>
<td></td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>GI 16</td>
<td>Retention and re-creation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2026</td>
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<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
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<td>Local authority/CIL/Developer land contributions</td>
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</table>
## Transportation

<table>
<thead>
<tr>
<th>T11</th>
<th>Bus improvements via Salhouse Road and Gurney Road</th>
<th>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</th>
<th>Norfolk County Council/ Norwich City Council</th>
<th>0.6</th>
<th>Rackheath PoD / Norfolk County Council/ DfT /CIL</th>
<th>2026</th>
<th>NATS</th>
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<tbody>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>7.5</td>
<td>Norfolk County Council/ DfT /CIL</td>
<td>2026</td>
<td>NATS</td>
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<tr>
<td>Total</td>
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<td></td>
<td></td>
<td>256.9</td>
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</table>
The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The three categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

NOTE: All schools in the period 2008-16 are expected to be covered by S106 or are covered by Children’s Services funding.

### Infrastructure Framework: Priority 2 projects 2016-2021

#### Education

<table>
<thead>
<tr>
<th>ED1</th>
<th>60 place pre-school</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Norfolk County Council</th>
<th>0.54</th>
<th>Childrens Services/CIL</th>
<th>2021</th>
<th>Infrastructure Needs and Funding Study 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED1</td>
<td>60 place pre-school (co-location with community space)</td>
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<td>0.54</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
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<tr>
<td>ED9</td>
<td>1400 secondary school</td>
<td>Old Catton, Sprowston,</td>
<td>Norfolk</td>
<td>13</td>
<td>Childrens</td>
<td>2021</td>
<td>Infrastructure Needs</td>
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</table>
## Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Project Description</th>
<th>Location</th>
<th>Responsible Body</th>
<th>Cost (£)</th>
<th>Source</th>
<th>Year</th>
<th>Study Reference</th>
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</thead>
<tbody>
<tr>
<td>HC4</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
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</tbody>
</table>

### Infrastructure Framework: Priority 2 projects 2021-2026

#### Education

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Project Description</th>
<th>Location</th>
<th>Responsible Body</th>
<th>Cost (£)</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>ED2</td>
<td>60 place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
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<td>Childrens Services/CIL</td>
</tr>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
</tr>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CIL</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts phase 2</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>13</td>
<td>Childrens Services/CIL</td>
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### Appendix 1 – Main Modifications

<table>
<thead>
<tr>
<th>HC5</th>
<th>Primary Care Centre (5 GPs and 4 Dentists)</th>
<th>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</th>
<th>Health Authority</th>
<th>3.35</th>
<th>Health Authority</th>
<th>2026</th>
<th>Infrastructure Needs and Funding Study 2009</th>
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</table>

71
## Infrastructure Framework: Priority 3 projects

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Community facilities: 2013-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF1</td>
</tr>
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<table>
<thead>
<tr>
<th>Community facilities: 2016-2021</th>
</tr>
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<tbody>
<tr>
<td>CF1</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Community facilities: 2021-2026</th>
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<tr>
<td>CF 1</td>
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Appendix 1 – Main Modifications

MM8

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<thead>
<tr>
<th>Ref</th>
<th>Page</th>
<th>Policy/Paragraph</th>
<th>Main Modification</th>
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<tr>
<td>MM8</td>
<td>-</td>
<td>New Section</td>
<td>Insert new Appendix 8a, to follow Appendix 8</td>
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</table>

Appendix 8a – Additional monitoring framework for the Broadland part of the Norwich Policy Area

Spatial Planning Objective 1: To minimise the contributors to climate change and address its impact.
Policy: 1, 3, 5, 6, 7, 9, 10, 11, 12, 13, 14, 18, 19

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of residents who travel to work: a) by private motor vehicle; b) by public transport; c) by foot or cycle; and d) work at or mainly at home.</td>
<td>Norfolk County Council / Developers / LPAs</td>
<td>Decrease in a) and increase in b), c) and d) over plan period</td>
<td>ONS (Census)</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 2: To allocate enough land for housing, and affordable housing, in the most sustainable settlements.
Policy: 4, 9, 10, 11, 12, 13, 14, 15, 16, 17, 19, 20, 21, 22

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing land supply within Broadland part of the NPA</td>
<td>LPAs/Developers</td>
<td>To have more than 90% of the required deliverable housing land (as defined in current national policy) in the rolling 5-year supply of housing land (plus the 'additional buffer' required in current national policy).</td>
<td>LPAs</td>
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### Spatial Planning Objective 4: To promote regeneration and reduce deprivation

**Policy:** 5, 6, 7, 9, 10, 11, 12, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
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</thead>
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<tr>
<td>Unfit housing – percentage of overall housing stock not meeting “Decent Homes Standard”</td>
<td>LAs</td>
<td>Decrease over plan period</td>
<td>LAs</td>
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</table>

### Spatial Planning Objective 7: To enhance transport provision to meet the needs of existing and future populations while reducing travel need and impact

**Policy:** 3, 6, 7, 9, 10, 12, 13, 14, 15, 16, 17, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of residents who travel to work:</td>
<td>Norfolk County Council / Developers / LPAs</td>
<td>Decrease in a) and increase in b), c) and d) over plan period</td>
<td>ONS (Census)</td>
</tr>
<tr>
<td>a) by private motor vehicle;</td>
<td>LPAs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) by public transport;</td>
<td>LPAs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) by foot or cycle;</td>
<td>LPAs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) work at or mainly at home.</td>
<td>LPAs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Spatial Planning Objective 8: To positively protect and enhance the individual character and culture of the area.

**Policy:** 2, 5, 7, 8, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heritage at risk – number and percentage of:</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
<tr>
<td>a) Listed Buildings; and</td>
<td>LPAs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Scheduled Ancient Monuments on Buildings at Risk Register</td>
<td>LPAs</td>
<td></td>
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</tr>
</tbody>
</table>
Spatial Planning Objective 9: To protect, manage and enhance the natural, built and historic environment, including key landscapes, natural resources and areas of natural habitat or nature conservation value.

Policy: 1, 3, 5, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>Heritage at risk – number and percentage of: a) Listed Buildings; and b) Scheduled Ancient Monuments on Buildings at Risk Register</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Appendix 3

Relationships between strategic growth locations within the Norwich Policy Area

Key
- Major housing growth & associated facilities
- Strategic employment locations
Main Housing Allocations

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Broadland District Council – 100022319
Norwich City Council – 100019747
South Norfolk District Council – 100019483

September 2009
Green infrastructure priority areas supporting key growth locations

Key

- **Priority areas for Green Infrastructure**
  - A Norwich to The Broads
  - B Wymondham to Norwich
  - C Water City
  - D Five Rivers
  - E Long Stratton to Norwich

- **Norwich urban area – additional opportunities for smaller scale Green Infrastructure throughout**

- **Growth locations**

- **Main towns and key service centres**

**Note:** Other Green Infrastructure opportunities promoted throughout the Joint Core Strategy area.
Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle
Note for Information

This document is prepared as a background document to inform the Councils’ consideration of the Inspector’s Report on the Examination of the Joint Core Strategy for Broadland, Norwich and South Norfolk: the Broadland part of the Norwich Policy Area Local Plan.

This is not an adopted document, but is an example of the document which will be produced if the Councils of Broadland, Norwich and South Norfolk each resolve to adopt the JCS as amended.
If you require this document in another format or language, please phone:
01603 431133
for Broadland District Council

0344 980 3333
for Norwich City Council

0808 168 3000
for South Norfolk Council
Joint Core Strategy for Broadland, Norwich and South Norfolk

January 2014

The Joint Core Strategy for Broadland, Norwich and South Norfolk (JCS) was adopted on 24 March 2011.

Following a legal challenge High Court Judge Mr Justice Ouseley found that those parts of the JCS concerning the North East Growth Triangle (NEGT) should be remitted for further consideration and that a new Sustainability Appraisal for that part of Broadland in the Norwich Policy Area be prepared.

The remittal meant that parts of the text, and some associated maps and diagrams, were taken back to the Regulation 19: Publication of a Local Plan Stage (previously known as the ‘pre-submission stage’), to be treated as not having been subject to examination and adoption. The remainder of the Joint Core Strategy remained adopted.

Following further consultation and an examination in 2013, the inspector found that the proposals for the Broadland part of the Norwich Policy Area were sound, subject to a number of modifications. This led to changes to the JCS being adopted in January 2014.

This document comprises the Joint Core Strategy document adopted in March 2011, as amended by the Broadland Part of the Norwich Policy Area: Local Plan, adopted in January 2014.

For more information on the stages in the development of the Joint Core Strategy, and detail on those parts of the JCS that were the subject of the examination in 2013, please visit the GNDP website www.gndp.org.uk
## Contents

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Our strategy</td>
<td>5</td>
</tr>
<tr>
<td>02</td>
<td>Introduction</td>
<td>9</td>
</tr>
<tr>
<td>03</td>
<td>Spatial portrait</td>
<td>13</td>
</tr>
</tbody>
</table>
| 04 | Spatial vision  
Spatial planning objectives | 18  
21 |
| 05 | Area-wide policies | 26  
Policy 1: Addressing climate change and protecting  
environmental assets | 26 |
|   |  
Policy 2: Promoting good design | 31 |
|   |  
Policy 3: Energy and water | 33 |
|   |  
Policy 4: Housing delivery | 36 |
|   |  
Policy 5: The economy | 41 |
|   |  
Policy 6: Access and transportation | 44 |
|   |  
Policy 7: Supporting communities | 47 |
|   |  
Policy 8: Culture, leisure and entertainment | 49 |
| 06 | Policies for places | 50  
Policy 9: Strategy for growth in the Norwich Policy Area | 51 |
|   |  
Policy 10: Locations for major new, or expanded,  
communities in the Norwich Policy Area | 58 |
|   |  
Policy 11: Norwich City Centre | 65 |
|   |  
Policy 12: The remainder of the Norwich urban area,  
including the fringe parishes | 69 |
|   |  
Policy 13: Main Towns | 71 |
|   |  
Policy 14: Key Service Centres | 75 |
|   |  
Policy 15: Service Villages | 78 |
|   |  
Policy 16: Other Villages | 80 |
|   |  
Policy 17: Smaller rural communities and the countryside | 82 |
|   |  
Policy 18: The Broads | 83 |
|   |  
Policy 19: The hierarchy of centres | 84 |
| 07 | Implementation and monitoring | 87  
Policy 20: Implementation | 87 |
|   |  
Policy 21: Implementation of proposals in the Broadland  
part of the Norwich Policy Area | 92 |
|   |  
Policy 22: Action to ensure the delivery of housing land in  
the Broadland part of the Norwich Policy Area | 92 |
| 08 | Appendices | 93  
1: Relationships to other strategies |   |
|   |  
2: Supporting documents |   |
|   |  
3: Superceded policies and changes to local plan  
proposals maps |   |
|   |  
4: Definition of the Norwich Policy Area |   |
|   |  
5: Old Catton, Sprowston, Rackheath, Thorpe St Andrew  
Growth Triangle |   |
|   |  
6: Housing trajectory |   |
|   |  
7: Implementation framework |   |
|   |  
8: Monitoring framework |   |
|   |  
9: Glossary |   |
01 Our strategy

Setting the scene

With a population of 200,000 the urban area of Norwich is one of the largest in the East of England. It is a major regional centre for employment, tourism and culture and is the region’s highest ranking retail centre. The area’s economic strengths include specialisms in biotechnology, food processing, financial services and creative industries. The excellent education facilities, including the University of East Anglia, Norwich University College of the Arts, City College and Easton College, coupled with the high quality of life, provide a solid foundation to enhance the city’s status as a major regional economic driver and a visitor destination of international importance.

Indeed, Norwich has been identified as a main focus for growth in the East of England, for new homes and jobs, leisure, cultural and educational development. The economic, social and cultural influence of the city extends well beyond its administrative boundaries into the neighbouring districts of Broadland and South Norfolk as well as further a field. However, in the rural areas, market towns continue to provide the most sustainable focus for development. The councils of Broadland, Norwich and South Norfolk, supported by Norfolk County Council have prepared a single plan covering the entire area. The plan provides the strategy to guide, manage and deliver the growth needed for the area.

Why does this area need to have growth?

Norwich and the surrounding area need growth for a number of reasons:

• people are living longer, and more live alone, resulting in smaller households. This increases the need for more houses irrespective of any growth in population
• the area is attractive to people moving from other parts of the country, for economic reasons or lifestyle choices
• more people are in need of housing as not enough homes have been built in recent years

These trends have an impact on the opportunities for local people to get on the housing ladder. Although house prices have fallen during the recession, the affordability of housing has not improved significantly. This puts mounting pressure on social housing and the housing waiting list. In addition infrastructure provision, particularly transport, has failed to keep pace with previous growth.

With public finance likely to reduce in coming years, being proactive in managing growth is a way of improving services for existing residents as well as building communities with enough jobs, good transport, schools, social community facilities and open space.

The grand challenges

The grand challenges that our Strategy has to address between 2008 and 2026 are:

Environment: enhancing our special environment and mitigating against any adverse impacts of growth
Houses: identifying land to meet the requirements of providing 37,000 additional homes
Jobs: securing another 27,000 new jobs of all types and levels in all sectors of the economy and for all the workforce
**Place making:** maximising the high quality of life we currently enjoy and respecting the patterns of living which characterise the area

**Infrastructure:** ensuring that essential infrastructure, services and community facilities are provided

The influences on planning for growth are not entirely within our control. Man’s impact on our environment is the greatest emerging challenge of our time. We need to fundamentally rethink the way we plan and design our built environment – by making a radical cut in carbon emissions, reducing reliance and costs of energy fuelled by carbon generating sources, and to adapt, by preparing for more extreme weather conditions.

We have to plan places and design and renovate buildings so they are more energy efficient and less carbon dependent, where walking and cycling is an option for many more journeys and our trees, plants, streams, ponds and rivers, play a vital role in bringing down temperatures, promoting diversity and preventing flooding.

All of this makes the challenges in planning for growth even more testing.

**Planning to meet the challenges**

Our strategy sets out how we expect to meet the challenges of finding space for 37,000 homes and creating 27,000 jobs in a way that minimises the impact on the environment and maximises the quality of life, whilst making sure we have the right supporting infrastructure in the right places and at the right time.

The strategy sets out the policies that will ensure we:

- locate development in places that will minimise adverse impact on the environment, and ensure it is designed to be energy efficient and capable of being adapted as circumstances change
- look after and improve the natural qualities of our area and take the opportunities which development brings to expand and create even more. We live in an area shaped by the past which we will take account of in growing the area
- look for the highest possible standards of design in creating a strong sense of place in our communities enabling residents to take pride in where they live, the way places and buildings are planned, designed and built.
- use energy and water wisely and secure more energy from renewable sources
- provide a range of accommodation to house our growing population available to buy, rent and be supported in, recognising the requirements of different groups in society
- support a vibrant local economy by building on existing economic strengths with more local job opportunities across all sectors of the economy and workforce
- deliver the Norwich Area Transportation Strategy (NATS) Implementation Plan, which includes the Northern Distributor Road (NDR), which is fundamental to the delivery of this strategy. Significant improvement to the bus, cycling and walking networks in Norwich can only be achieved with the road capacity released by the NDR which also provides necessary access to key strategic employment and growth locations
- ensure that the services and facilities needed for communities are made available in the right place and at the right time
- use growth as a means of enhancing the quality of life of existing residents
- build on the cultural offer of the area increasing its attractiveness for residents and business alike.
The dilemmas
The dilemmas we faced in preparing the strategy and proposing locations for growth have been great. The strategy recognises the differences between Broadland, Norwich and South Norfolk and seeks to address these issues.

The growth in new homes and jobs is centred in and around Norwich recognising its role as the focus for jobs, services and facilities. Brownfield sites will be used wherever possible, but given the constraints on the city developing green fields in Broadland and South Norfolk is unavoidable. Development of our market towns and larger villages plays an important role in the strategy.

As the city has expanded, the villages immediately to the north, east and west have taken on a more urban form, becoming part of the city, although the communities themselves have retained their individual identities. However, the story is different south of the city where an undeveloped green gap has been maintained.

In assessing the evidence to help identify the most appropriate locations for growth outside of the urban area, the area to the north east of the city and the A11 corridor to the south west perform well. This allows for a concentration of new development to maximise the use of existing infrastructure, achieve a scale of development that will deliver new supporting infrastructure at lower cost per unit, and mitigate against the environmental impacts of developing in green field locations.

In the case of Broadland, the historical pattern of development lends itself to further expansion with new growth locations in the parishes of Old Catton, Sprowston and Thorpe St Andrew, and the development of a low carbon community focussing on Rackheath, given its existing employment opportunities and railway line. The growth in these locations relies on the implementation of NATS. Implementation of NATS is essential even without growth and it becomes even more important as one of the key elements of infrastructure to support future growth. The Norwich Area Transportation Strategy includes the construction of the NDR which will provide improved access around the north of the city, to enhance the living conditions for those residents who live in the northern suburbs, and to enable improvements to be made to buses, cycling and walking routes.

By contrast the historic pattern of development in South Norfolk has focussed on its network of villages and market towns, such as Long Stratton and Wymondham, and has retained strategic green gaps between settlements. As well as providing a range of services, facilities and employment opportunities for residents these settlements have a high degree of sustainability in their own right and have a greater independence from the city of Norwich.

We have weighed in the balance the findings of technical evidence against the preferences of local communities expressed during the consultation stages. The relative weight given to these factors has resulted in a more dispersed pattern for locations in South Norfolk being proposed than the technical evidence alone would suggest. The strategy we have adopted reflects the existing local settlement pattern, promoting a scale of development that is appropriate to the size and function of the town and villages named as well as the balanced development of existing and emerging market towns in appropriate locations. This approach can help to secure a bypass for Long Stratton which is a long held aspiration of residents and local councils.
This pattern of growth in South Norfolk builds on the existing infrastructure of the towns and villages in the district. It acknowledges the additional challenges such an approach will bring to the delivery of the supporting infrastructure required to achieve the sustainable communities we strive to deliver. Concentrating all growth on the A11 corridor would result in the excessive expansion of Wymondham and Hethersett, altering not only the character of the settlements themselves but also eroding the degree of separation between the settlements and Norwich.

The importance of the city centre to the area’s success cannot be overstated and we will strengthen its role as a regional centre. The strategy also promotes redevelopment, regeneration and enhancement of the Norwich urban area beyond the city centre.

In the rural area the Main Towns will accommodate additional housing, town centre uses, employment and services. Our larger villages will have some housing, servicing and employment opportunities and our smaller villages will have small-scale development appropriate to the scale and needs of the village and its immediate surroundings. Elsewhere in our rural communities and open countryside development will be limited and only permitted where it can be justified.

**Implementation**

Our plan is ambitious and our aspirations are high but they will mean nothing if we don’t make it happen. This level of growth is unprecedented in this area - this is why we are taking an unprecedented approach in preparing for it.

We have gathered considerable evidence, carefully marshalled our arguments and proposed a strategy that is right for our area. If it cannot proceed in the way that we have planned for, the scale of growth we have signed up for is questionable and will require a solution that extends beyond our area.

Implementing this strategy will depend on the coordinated activities of a number of agencies and will require innovative ways of funding. This is harder given the economic conditions the country is currently experiencing but our strategy is long-term and will be in place in time to meet the turn around in the economy. We will maximise all opportunities to secure funding support but timely delivery of the strategy will rely on the introduction of a new developer contribution mechanism.

We believe the strategy provides a way for managing growth while delivering improved services for existing residents, as well as building communities with enough jobs, good transport, schools, social community facilities and open space.
02 Introduction

2.1 This Joint Core Strategy (JCS) has been prepared by the three councils of Broadland, Norwich and South Norfolk, working together with Norfolk County Council as the Greater Norwich Development Partnership (GNDP).

2.2 The JCS sets out the long-term vision and objectives for the area, including strategic policies for steering and shaping development. It identifies broad locations for new housing and employment growth and changes to transport infrastructure and other supporting community facilities, as well as defining areas where development should be limited. It helps co-ordinate and deliver other services and related strategies (these strategies are identified in Appendix 1).

2.3 In many areas existing infrastructure is at, or near capacity. The JCS is designed to deliver substantial growth in housing and employment but this is dependent on investment to overcome the deficiency in supporting infrastructure. The JCS cannot be delivered without the implementation of the Norwich Area Transportation Strategy including the Northern Distributor Road. Other fundamental requirements include significant investment in green infrastructure, education, waste and water infrastructure including Whitlingham sewage treatment works and a range of other community facilities.

2.4 The Local Strategic Partnerships have identified the aspirations and needs of local people in Sustainable Community Strategies, which create a long-term vision for the area and set the agenda for priorities in the Local Area Agreement.
The role of the Joint Core Strategy

2.5 The JCS is the spatial expression of the Sustainable Community Strategies. The strategies should share the same vision and, where possible, the same priorities and objectives.

2.6 The JCS forms part of each council’s Local Development Framework (LDF); a ‘folder’ of documents that will guide future development and use of land in Broadland, Norwich and South Norfolk up to 2026. It does not cover the area of the Broads Authority which is a separate planning authority.

2.7 The LDF replaces old-style Local Plans and will be used to assess all planning applications. Subsequent parts of the LDF will provide more detailed development management policies and will also allocate sites for new developments. While the Core Strategy is being produced jointly, it is currently expected that the rest of the LDFs will be produced by each individual authority. The LDF timetables are set out in the local authorities’ Local Development Schemes.

2.8 The JCS has to comply with national planning policies and demonstrate how required growth can be delivered. At the time of its adoption the JCS is required to be in conformity with the East of England Plan (EEP). Under proposed legislation the EEP would be revoked. However, the JCS is supported by a significant evidence base that demonstrates that it remained valid and its policies do not rely on the East of England Plan. Prior to adoption references to the East of England Plan have been simplified.

2.9 European and national legislation requires local planning authorities to undertake a Sustainability Appraisal of the JCS, and an Appropriate Assessment. These form part of the evidence base.

2.10 The JCS should not repeat national or regional policies. Users of this strategy will need to refer to Government policy documents and the East of England Plan, while it remains in
place. The most relevant references are identified at the end of each policy. In addition, links are provided to the evidence base, topic papers and strategy objectives.

2.11 This is a high level strategy and most of the policies in the currently adopted Local Plans will continue to apply. However, some of the policies in those plans are of a more strategic nature and will no longer be relevant. Although this strategy is not site specific and will therefore have limited effect on the proposals maps, there are a few instances where they will change. The superceded policies and the changes to proposals maps are listed in Appendix 3.

References
02 Introduction
- Planning Policy Statement 12
- Broadland Community Partnership Strategy and Action Plan
- A New Vision for Norwich: The Sustainable Community Strategy
- Your Sustainable Community Strategy for South Norfolk
- Norfolk Ambition – The Sustainable Community Strategy for Norfolk
03 Spatial portrait

3.1 Greater Norwich is one of the most important city regions in the east of England. It has the region’s largest economy and the highest ranking retail centre. The area has three assets of international importance – its heritage, natural environment and its growing knowledge economy. This rich heritage and abundance of cultural assets are key elements of the future economy of the area. Knowledge-based industries cluster where quality of life is high and where support services and businesses are found.

3.2 Outside Norwich the area retains a largely rural character and high environmental quality. Small towns and numerous villages are spread through attractive countryside, which also provides the setting for the city of Norwich. Large parts of Broadland fall within the urban area and parishes close to the city centre have a strong relationship with Norwich. Away from the urban area the district extends into a rural landscape distinguished by market towns and small villages. South Norfolk has a smaller urban fringe. Large parts of the district have weaker links with Norwich and look to the network of major centres, such as Wymondham, Diss and Harleston, and smaller centres, such as Loddon and Long Stratton, to meet their everyday needs.

3.3 River valleys and green areas extend into or adjoin, built-up areas, creating a close relationship between urban and rural. Particular features include the Broads, of National Park status, and areas of international nature conservation importance. More generally, there is a variety of landscape types which gives a distinctive character to individual parts of the area. Wildlife habitats of national or local importance are found in the urban area as well as the countryside. As well as these semi-natural aspects, there is a strong historic influence.

3.4 The area has a rich concentration of historic assets, dominated by the medieval city of Norwich and its surrounding market towns, and also includes historic buildings, halls and parklands in the surrounding countryside. Ancient monuments and archaeological remains add a further layer to this historic character. Together, the semi-natural and built assets create a wonderful environmental quality, enjoyed by both residents and visitors.

3.5 Outside of the area the Brecks and the Norfolk coast are important visitor attractions, but they are also highly sensitive environments of international importance.

3.6 In 2007 the estimated total population of the three districts was 372,500, with over 200,000 living in the Norwich urban area. Population growth has been relatively rapid in recent years, particularly in Norwich, with an estimated 20,000 increase in population of the three districts since the 2001 census. This is mainly the result of internal migration from the neighbouring regions to Broadland and South Norfolk and international migration to Norwich. The population of Norwich contains a relatively high proportion of younger people, while in Broadland and South Norfolk there is a high proportion of older people. Life expectancy is higher than the national average.

3.7 The economy is diverse and, until the recession, was performing strongly. High numbers of new jobs have been created. The importance of manufacturing and farming has declined, though agriculture is still the largest user of land and automotive engineering remains strong. There has been major development of the service sector in an increasingly globalised economy. Particular strengths include the growing knowledge economy (mainly life
Scientific and health (financial services, retail, media, arts and cultural and information technology based industries. Relatively low wages remain a weakness.

3.8 Economic growth is reflected in the fact that Broadland and South Norfolk are generally relatively affluent. However, deprivation is dispersed across rural parts of the area in small pockets and there are extensive levels of multiple deprivation in Norwich, the second most deprived local authority area in the region. The national economic recession and historically lower wage levels than in other parts of the East of England may compound this. Levels of health, well-being and community safety are good across the area as a whole, though the city has more limiting long-term illness and also higher crime levels associated with the regionally-important concentration of night time attractions.

3.9 Despite significant house building in recent years, including relatively high amounts of affordable housing completions (22% in 2007/8), the need for further affordable housing remains high. Further sites are required to meet the needs of Gypsies and Travellers and travelling showpeople.

3.10 The area benefits from a strong and growing tertiary education sector with the University of East Anglia, the Norwich University College of the Arts, City College Norwich and Easton College. However, the proportion of local people with qualifications is relatively low.

3.11 Public transport facilities in the area are generally good. Norwich has the most bus-based Park & Ride sites in the country and is one of the few places where bus use has increased. The area also benefits from a local rail network radiating from Norwich. Rural bus services are generally adequate on radial routes from Norwich, but there are limited cross-country links. Demand-responsive transport has been promoted by the County Council to provide better rural coverage. Opportunities to further enhance bus-based public transport in, and to, Norwich are severely limited by congested road space. Since there is net in-commuting to Norwich from all directions, peak hour congestion occurs around the city. In particular, there are unacceptable levels of traffic in the northern suburbs and on minor roads in the nearby villages adversely affecting quality of life, local business, access to the airport, and opportunities for growth.

3.12 A large amount of development has and continues to take place in and around Norwich. The Broadland Business Park, the expansion of Norwich International Airport, Longwater employment area, major supermarkets and the Norfolk and Norwich University Hospital have all been developed outside the city centre. These changes in land use, the increased car ownership and broader social changes have resulted not only in a changed trip pattern but also greatly increased the number of trips in and around Norwich. This resultant traffic is causing delays at most junctions within Norwich. Much of the existing network is currently operating at over 90% of its capacity which leads to a situation where delays to traffic are significant. As the economy in Norwich grows, it is likely that traffic levels will grow and add to the congestion problem.

3.13 There is also significant through traffic, despite actual volumes crossing the inner ring road declining. Work on the traffic impacts of the NDR suggests that there are some 19,000 cross city trips that the scheme would remove.
3.14 Principal international connections are via Norwich International Airport, Stansted Airport, Eastport (Great Yarmouth) and Haven Gateway (Felixstowe and Harwich). Stansted Airport has major growth planned. If this should be delayed further growth pressures are likely at Norwich International Airport.

3.15 The A11 provides key strategic access to London, Cambridge, the south Midlands and much of the rest of the UK. The dualling of the A11 is due for completion in 2013.

3.16 This JCS proposes significant growth in the A11 corridor. The Breckland Core Strategy also proposes 4,000 dwellings at Attleborough and 6,000 at Thetford, and strategic employment development is proposed at Snetterton.

3.17 Road access to and through the north of Norwich is congested. As a consequence, strategic access to Norwich International Airport, the coast and the Broads is poor.

3.18 The A140 provides strategic access to London and Ipswich and local links to Diss and Harleston. The A140 is almost entirely single carriageway and subject to a range of speed restrictions, particularly in Suffolk. The A146/A12 is an important link for the rural south east of the JCS area, and for Beccles and Bungay in Waveney.

3.19 The A47 to the west provides strategic road access to the Midlands and North. It is mostly single carriageway in Norfolk and suffers from congestion and safety issues. Significant growth is proposed at East Dereham and King’s Lynn.

3.20 The A47 and A12 to the east of the JCS area, connect to Great Yarmouth and Lowestoft which are coastal resorts and industrial towns with significant regeneration needs. The development of Eastport at Great Yarmouth will provide access to continental Europe. However, the A47 to the east of Norwich has significant limitations.

3.21 The mainline rail service provides access to Wymondham, Diss, Ipswich, Cambridge, London and the rest of the UK. There are ongoing issues of journey reliability and duration on the rail line. No Government commitment has been made to the East-West rail proposal which would provide direct access to Oxford and the west of England.

3.22 The Bittern Line provides a local rail link for North Norfolk and the Wherry Line provides a local rail link to Great Yarmouth and Lowestoft.

3.23 Wroxham/Hoveton is a cross-border settlement, with growth planned at Hoveton in the North Norfolk Core Strategy in recognition of its wide range of services.

3.24 The Broads Authority area extends into the JCS area. The boundary is tightly drawn and many Broads settlements are within the JCS area rather than the Broads Authority area. The Broads are a major tourism and leisure asset but also a highly sensitive wetland environment of international significance.

References
03 Spatial portrait
- Norfolk County Council 2007 mid year population estimates
- Norfolk Insight
- The English Indices of Deprivation 2007
- Deprivation in Rural Norfolk: OCSI 2006
- Greater Norwich Housing Market Assessment
- An Economic Assessment of Greater Norwich (2009)
- Pre-submission JCS Sustainability Appraisal Report
- Natural England Countryside Character maps
- Regional Spatial Strategy: Annual Monitoring Report
04 Spatial vision

4.1 The Sustainable Community Strategies for Broadland, Norwich and South Norfolk and the County Strategic Partnership express their communities’ local aspirations and provide a context for this Joint Core Strategy.

4.2 The main common themes of the Sustainable Community Strategies are:
- to have access to suitable housing, jobs, facilities and services for all whatever their needs
- to have healthier and safer places and a high quality environment that is protected and respected for everyone’s enjoyment
- to develop the right infrastructure so that people can travel using varied forms of transport
- to provide opportunities for people to learn at all stages of life
- for people to play an active part in community life and to be involved in decision making

4.3 The spatial vision acknowledges significant changes to the area required to meet the ambitious targets for new homes and jobs that the area needs. This vision describes what sort of area we are aiming for in the future and shows how the spatial planning elements of the Sustainable Community Strategies can be achieved. The central theme is building sustainable communities with a high quality of life, by addressing the implications of climate change, conserving and enhancing the area’s high quality environment, providing for the full range of essential infrastructure and community facilities, enhancing accessibility, building on the cultural assets and creativity of the area, and ensuring a vibrant economy fulfils its potential.

The spatial vision

By 2026 the extended communities of Broadland, Norwich and South Norfolk will be strong, cohesive, creative and forward-looking. Between 2008 and 2026, at least 36,820 new homes will be built (of which approximately 33,000 will be in the Norwich Policy Area as defined in Appendix 4) and about 27,000 new jobs will be created. All communities will be safer, healthier, more prosperous, sustainable and inclusive. High quality homes will meet people’s needs and aspirations in attractive and sustainable places. People will have access to good quality jobs and essential services and community facilities, with less need to use the car.

Development will be to the highest possible standards of design, enhancing the quality and distinctiveness of the area and will bring improved infrastructure, services and facilities to benefit new and existing communities.

Growth will be focussed on brownfield land in the Norwich urban area and in a very large mixed use urban extension within the Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle (Appendix 5). Other large-scale growth will take place at the expanded communities of Easton/Costessey, Cringleford, Hethersett, Long Stratton and Wymondham. New and expanded communities will be highly sustainable with good access to local jobs and strategic employment areas and will be served by new or expanded district and local centres providing shops, health, education, services and facilities easily accessible by foot, bicycle and public transport. More moderate levels of growth will take place in the other...
tours and larger villages across the area, supported by new local jobs, services, community facilities and other infrastructure.

Climate change and sustainability

• regeneration, development and growth will create sustainable places and revitalise areas of deprivation, while minimising the use of global resources, supporting the development of good waste management practices, maximising the use of brownfield land and mitigating and adapting to the effects of climate change
• people will use less water, the quality of water resources and the aquatic environment will be maintained or improved, and the risk of flooding will be avoided or mitigated
• inspired by the proposed exemplar at Rackheath, zero carbon development will be the standard to be achieved through advances and innovation in the design, construction and management of sustainable communities and new buildings which improve energy efficiency and use renewable energy
• a network of green links will connect existing open space and wildlife habitats across urban areas and the countryside, and link to neighbouring areas outside the JCS including the Broads

Communities

• everyone will have access to suitable housing that reflects their needs
• people will enjoy healthy, safe and fulfilling lifestyles, have equitable access to high standards of health and social care and make informed choices about their own health
• there will be excellent opportunities for lifelong learning and personal development and people will have high expectations for their own educational achievement to meet their needs, to contribute to the life of their communities, and to the economy
• the area will be renowned for its culture, creativity and spirituality, with high quality cultural and leisure opportunities that improve people’s well-being
• there will be excellent public open space, sport and recreational facilities and community centres. Improved access to and from the countryside will ensure everyone can take part in community and cultural activities

Working and getting around

• business investment in the area will support and create a sustainable, diverse and thriving economy that is accessible and appropriate to the needs of all the community, where the social and environmental performance of the economy is improved
• investment at strategic and other employment locations will help create a stronger economy (including at Norwich city centre; Norwich Research Park, Hethel Engineering Centre, Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle, Longwater, Wymondham and around Norwich International Airport). Growing the local economies in Main Towns and Key Service Centres will help revitalise the whole economy
• access to and across the area will be improved with the completion of the NDR and the Long Stratton bypass. As a key element of NATS the NDR is needed to service current transport requirements and is a pre-requisite for development of housing and employment to the north east of Norwich. The NDR will enable significantly enhanced public transport, cycling and walking networks. A Bus Rapid Transit network will serve key destinations. Rural isolation will be reduced by improving transport networks and
encouraging and enabling new communication and information technologies. Aided by this package of measures, people will need to use their cars less as jobs, shops, schools, services and recreational facilities will be in areas accessible by public transport, cycling and pedestrian routes.

- more visitors will be attracted to the area by enhancing links between the wider Norwich area and places of natural beauty such as the Broads, the Brecks and the coast

**The urban area of Norwich**

- the expanded urban area of Norwich will be a greener city, both in appearance and environmental performance. It will be a stronger social, economic and cultural centre with a focus for jobs, shopping, leisure and other activities
- the extent and intensity of deprivation will have been significantly reduced
- Norwich city centre will build on its importance for key economic sectors including financial and general insurance services, retailing and creative and media industries. It will continue to be a UK ‘top-10’ retail centre
- Norwich will treasure and promote its rich historic, cultural and architectural heritage, encouraging new buildings built to an exceptional design quality, and by maintaining and enhancing its parks, wildlife sites, woodland and heathland
- Norwich will continue to be the cultural capital of East Anglia and local people and visitors will have access to theatres, art galleries, museums and buildings of architectural and historical interest. The cultural economy will stimulate regeneration, increase tourism and encourage an active and cohesive community
- sustainable transport options will include a network of safe and convenient pedestrian and cycle links and public transport services to provide easy access between residential areas, the city centre, business parks, local services and further a field, reducing the need for car use
- a vibrant network of accessible district and local centres will provide for day to day needs

**Towns, villages and the rural area**

- the Main Towns, Key Service Centres and Service Villages will be focal points for communities to have better access to quality jobs, healthcare, education and community facilities and shops
- the rural area will retain its distinctive Norfolk character and will continue to be working and tranquil, recognising the Broads, and other locally and nationally important habitats

The four Main Towns of Aylsham, Diss, Harleston and Wymondham will:

- provide for a safe and healthy quality of life
- retain attractive historical centres as a focus for their continued success serving their rural catchments
- enjoy greater economic prosperity with new opportunities for business
- accommodate new housing allocations that will be moderate in Aylsham (300 homes – subject to resolution of sewage capacity constraints), Diss (300 new homes) and Harleston (200-300 new homes), and large-scale in Wymondham (2,200 dwellings). This will be developed in a sustainable manner complementing each town’s form, function, historic character and quality, and incorporating good sustainable transport
links to town centres, local employment locations and good recreation, leisure and community facilities

• be enhanced by cultural activities including those arising from ‘Cittaslow’ (slow town) status in Diss and Aylsham

The ten Key Service Centres of Acle, Blofield, Brundall, Hethersett, Hingham, Loddon / Chedgrave, Long Stratton, Poringland/Framingham Earl, Reepham and Wroxham will:

• remain attractive places with a range of enhanced shops, services, community facilities and job opportunities to meet local and surrounding area needs
• generally accommodate small to moderate new housing allocations (between 50 and 200 dwellings) in accordance with the capacities of local services, community facilities and utilities provision. Hethersett and Long Stratton will see more major housing growth and enhanced services. Long Stratton residents will also benefit from the enhanced quality of life resulting from a bypass
• form limited, but strong employment and tourism-related links with the Norfolk Broads (i.e. at Acle, Brundall, Loddon/Chedgrave and Wroxham)
• have enhanced transport links to Norwich and the Main Towns

The vitality of Service and Other Villages will have been enhanced and their form and character maintained by the development of sustainable, small-scale housing, economic development and other local facilities.

4.4 Spatial planning objectives

Spatial planning objectives provide the framework to monitor the success of the plan. They are derived from the Sustainable Community Strategies.

Objective 1
To minimise the contributors to climate change and address its impact
Throughout Broadland, Norwich and South Norfolk, high standards of design and sustainable access will be promoted to reduce greenhouse gases and adapt to the impact of climate change. Zero and low carbon developments will be encouraged. Water efficiency will be a priority in both new and existing development. New development will generally be guided away from areas with a high probability of flooding. Where new development in such areas is desirable for reasons of sustainability (e.g. in the city centre), flood mitigation will be required and flood protection will be maintained and enhanced.

Objective 2
To allocate enough land for housing, and affordable housing, in the most sustainable settlements
The type, size and tenure, including affordable housing, will meet the needs identified by the Greater Norwich Sub Regional Housing Assessments. Most new homes will be built in the Norwich Policy Area (around 33,000 out of 36,820 between 2008 and 2026). Smaller sustainable settlements will accommodate smaller-scale growth. People will have alternatives to using cars and new housing, employment and services will be planned so they are grouped together wherever possible. The settlement hierarchy defines the towns and villages with a good range of jobs, services and facilities. Appropriate densities will make sure land is used efficiently and community needs will be met.
Objective 3
To promote economic growth and diversity and provide a wide range of jobs
Existing employment sites will be safeguarded and enough land for employment development will be allocated to meet the needs of inward investment, new businesses and existing businesses wishing to expand or relocate. Norwich city centre will continue to exert a powerful economic influence over the wider area. Its growth will be further encouraged, so that the centre remains one of the best in the country for retail and employment. Within the Norwich Policy Area, Thorpe St Andrew, Longwater, Norwich Research Park, Norwich Airport, Rackheath, Hethel and Wymondham will also be the focus of further jobs growth. Supporting economic growth in the market towns and revitalising the rural economy are also priorities. Mixed-use development, live/ work units and diversification schemes will be encouraged to reduce the need for local people to commute long distances to work. As the employment needs of the area are so diverse it is essential to provide jobs for all people in the community.

Objective 4
To promote regeneration and reduce deprivation
There are significant concentrations of deprivation in Norwich, as well as equally serious pockets of deprivation in surrounding towns, villages and rural areas. Growth will be used to bring benefits to local people, especially those in deprived communities, to regenerate communities, local economies, under-used brownfield land and neighbourhoods by creating safe, healthy, prosperous, sustainable and inclusive communities. Development and growth will be used to bring benefits to local people, especially those in deprived communities.

Objective 5
To allow people to develop to their full potential by providing educational facilities to support the needs of a growing population
Within Broadland, Norwich and South Norfolk there is a need to improve, expand and develop new education provision to serve an increasing population and higher educational aspirations. It is essential to provide an environment and the facilities to improve the skills of the workforce to support the developing economy of the area.

Objective 6
To make sure people have ready access to services
Norwich city centre will continue to provide a wide range of services accessible to a very wide area. The diversity, vitality and accessibility of the city centre will be maintained and enhanced. Investment will be encouraged in district and local centres to enhance accessibility, vitality and viability. The surrounding market towns and service centres will continue to play a key service role. Innovative approaches will be taken to support rural service provision. Wherever new homes or jobs are to be developed, existing supporting services must either already be adequate or will be provided at the right stage of a new development. This will ensure existing and future residents and workers will have access to the services they need.

Objective 7
To enhance transport provision to meet the needs of existing and future populations while reducing travel need and impact
The location and design of development will reduce the need to travel especially by private car. Greater use of sustainable modes of transport will be encouraged by better public transport, footways and cycle networks, and by co-location of housing with services, jobs,
shops, schools and recreational facilities. A Bus Rapid Transit system and general enhancement to bus infrastructure will be introduced on key routes in the Norwich area. The strategic road network is also essential, especially for the health of the economy. The road network will provide improved access within Broadland, Norwich and South Norfolk in particular through the construction of the Northern Distributor Road. More than 90% of the area is rural and rural isolation can be reduced by encouraging newer communication and information technologies.

Objective 8
To positively protect and enhance the individual character and culture of the area
Promoting culture will help to develop the economy, stimulate further regeneration, increase sustainable tourism and promote community involvement. The role of Norwich as the cultural capital of East Anglia will be enhanced, so local people and visitors have access to a variety of facilities such as theatres, art galleries, museums and buildings of architectural and historic interest. Smaller scale cultural opportunities exist throughout the rest of the area and, in particular, in the market towns. Adequate public open space, sport and recreational facilities, as well as access to the countryside, is needed locally to make sure everyone can take part in community activities. More visitors will be encouraged to the area by protecting the very qualities that make the area attractive. Gateways between the wider Norwich area and the Broads, the Brecks and the coast will be enhanced in a way that does not harm their special character.

Objective 9
To protect, manage and enhance the natural, built and historic environment, including key landscapes, natural resources and areas of natural habitat or nature conservation value
The area is a special place and everyone should be proud of where they live, work, or study. Norwich has a remarkable historic centre with some fine architecture. There are also extensive areas of open space, historic parks and gardens, wildlife sites and wooded ridges in the city. The surrounding market towns and villages are very attractive with each having its own identity. People living in the area have access to open countryside, river valleys, wildlife sites and the special qualities of the Broads and the coast. It is a priority to maintain and improve these special qualities so that everyone can enjoy them. The use of previously developed land will be prioritised to minimise the loss of agricultural land and the countryside. The scale of development we have to accommodate will require the development of some significant greenfield areas, which will affect the existing landscape. Where this is necessary, development must provide environmental gains through green infrastructure, including allotments and community gardens. Biodiversity, geodiversity and locally distinctive landscapes will be protected and enhanced. Linkages between habitats will be promoted, helping to enable adaptation to climate change. Sustainable access to the countryside will be promoted. Efficient use will be made of minerals, energy and water resources, and the production of waste will be minimised.

Objective 10
To be a place where people feel safe in their communities
People will have a stronger sense of belonging and pride in peoples’ surroundings. There will be reduced crime and the fear of crime. Better community facilities, better road safety and design of new developments will help to reduce crime.
Objective 11
To encourage the development of healthy and active lifestyles
Within Broadland, Norwich and South Norfolk the accessibility of open space, the
countryside, sports and recreational facilities will be improved. People will also be offered the
best opportunities to make healthy travel choices as part of their daily lives. By working with
NHS Norfolk and Norfolk County Council, medical and social facilities will be properly
planned for new developments and will be accessible to all.

Objective 12
To involve as many people as possible in new planning policy
All sections of the community will be actively encouraged to express their own vision of the
future through this strategy, further plans and planning applications. There will be a particular
focus on involving people who have not previously had a say in planning. As many people as
possible should play a part in the ambitious long-term plans for growth across the whole area.
This will help make planning more inclusive, and give confidence that the benefits of growth
are felt more equally across existing and new communities in and around Norwich.

References
04 Spatial vision
• Broadland Community Partnership Strategy and Action Plan
• A New Vision for Norwich: The Sustainable Community Strategy
• Your Sustainable Community Strategy for South Norfolk
• Norfolk Ambition – The Sustainable Community Strategy for Norfolk
05 Area-wide policies

Policies 1 to 8 apply to the whole plan area

Policy 1: Addressing climate change and protecting environmental assets

To address climate change and promote sustainability, all development will be located and designed to use resources efficiently, minimise greenhouse gas emissions and be adapted to a changing climate and more extreme weather.

Development will therefore:
- be energy efficient
- provide for recycling of materials
- use locally sourced materials wherever possible
- be located to minimise flood risk, mitigating any such risk through design and implementing sustainable drainage
- minimise water use and protect groundwater sources
- make the most efficient appropriate use of land, with the density of development varying according to the characteristics of the area, with the highest densities in centres and on public transport routes
- minimise the need to travel and give priority to low impact modes of travel
- be designed to mitigate and be adapted to the urban heat island effect in Norwich
- improve the resilience of ecosystems to environmental change

The environmental assets of the area will be protected, maintained, restored and enhanced and the benefits for residents and visitors improved.

Development and investment will seek to expand and link valuable open space and areas of biodiversity importance to create green networks. Where there is no conflict with biodiversity objectives, the quiet enjoyment and use of the natural environment will be encouraged and all proposals should seek to increase public access to the countryside.

All new developments will ensure that there will be no adverse impacts on European and Ramsar designated sites and no adverse impacts on European protected species in the area and beyond including by storm water runoff, water abstraction, or sewage discharge. They will provide for sufficient and appropriate local green infrastructure to minimise visitor pressures. Development likely to have any adverse effect on nationally designated sites and species will be assessed in accordance with national policy and legislation.

In areas not protected through international or national designations, development will:
- minimise fragmentation of habitats and seek to conserve and enhance existing environmental assets of acknowledged regional or local importance. Where harm is unavoidable, it will provide for appropriate mitigation or replacement with the objective of achieving a long-term maintenance or enhancement of the local biodiversity baseline
- contribute to providing a multi-functional green infrastructure network, including provision of areas of open space, wildlife resources and links between them, both off site and as an integral part of the development
- help to make provision for the long-term maintenance of the green infrastructure
network
• protect mineral and other natural resources identified through the Norfolk Minerals and Waste Development Framework

The built environment, heritage assets, and the wider historic environment will be conserved and enhanced through the protection of buildings and structures which contribute to their surroundings, the protection of their settings, the encouragement of high-quality maintenance and repair and the enhancement of public spaces.

*Contributes to spatial planning objectives 1 and 9*

5.1 Government and regional policy places considerable emphasis on the need to minimise emissions and respond to the effects of climate change. It will be important to ensure that development fulfils this requirement and meets the challenge. Polices 2 and 3 below, promoting high quality design and water and energy efficiency will have a key role in addressing climate change and the theme finds expression in several other policies in the JCS.

5.2 Higher development densities support public transport, local services and resource efficiency. In appropriate urban locations car-free development will be promoted. However, consideration of density will also need to take account of local characteristics and other design criteria including the need for open space.

5.3 While subsequent policies in this strategy maximise the level of development on brownfield land the opportunities for new allocations are limited. Only a very limited proportion of new employment allocations and fewer than 20% of new housing allocations are likely to be on brownfield land. When added to existing commitments the proportion of total housing development on brownfield land is likely to be between 25% and 30%.

5.4 The area has a wealth of environmental assets ranging from international and national status, to those of local importance. These must be safeguarded and enhanced for the benefit of current and future generations. These assets include biodiversity (wildlife and habitats), built heritage and the wider historic environment, ancient monuments and archaeological assets, geodiversity (geological features), landscape and historic landscape character; as well as more general aspects such as the countryside and rural character, the setting of Norwich, towns and villages and the Broads. Assets of local importance, such as County Wildlife Sites are valuable in their own right, and in combination provide a significant resource.

5.5 Investment and development will provide a multi-functional network of green spaces and green links, having regard to factors such as accessibility, existing and potential open spaces, natural and semi-natural areas, protection of the water environment, landscape, geodiversity and the fundamental need to contribute to ecological networks. More detailed delivery of green infrastructure will be taken forward through delivery plans and other elements of LDFs.

5.6 Many of Norfolk’s natural habitats have been lost and fragmented with once extensive areas of habitat reduced to small remnants isolated from each other and surrounded by relatively inhospitable land uses, reducing biodiversity and increasing vulnerability. To
address these concerns, the Norfolk Biodiversity Partnership accords high priority to the development of an ecological network, as illustrated by the map on page 28, which includes:

- core areas, formed of existing clusters of high value wildlife sites
- enhancement areas, where there is a need for habitat improvement and creation
- corridors and stepping stones through green infrastructure improvements

5.7 The overall aim of the network is to promote connectivity between core areas and through the wider landscape, thus allowing wildlife to move in response to environmental change and other factors. To achieve this, enhancement of habitats outside of the core and designated areas will also be required. The creation of ecological networks is fundamental to meeting local and regional biodiversity targets but will be a long-term process that is likely to take several decades to complete.

5.8 Sufficient high quality green infrastructure will be required to provide buffer zones and alternative destinations to help manage visitor pressure on the Broads and other nearby areas of national and international importance for biodiversity. It is particularly important that all proposals and policies in this strategy are read in conjunction with this policy and the need to have no detrimental effects on Special Protection Areas (SPAs), Special Areas for Conservation (SACs) and Ramsar sites. These internationally designated sites are protected under the Habitats Regulations. To reflect the findings of the Habitats Regulation Assessment of the JCS, the policy places a particular focus on their protection in relation to water quality, water resource and visitor pressures.

5.9 A proposed green infrastructure network (see map on page 29) for the whole Greater Norwich area has been identified to inform more detailed policies elsewhere in LDFs and the green infrastructure priority areas supporting growth locations set out on page 62.

References

05 Area-wide policies, Policy 1

- Planning Policy Statement 1 (PPS1) Delivering Sustainable Development
- Planning Policy Statement 5 (PPS 5) Planning for the Historic Environment
- Planning Policy Statement 9 (PPS 9) Biodiversity and Geological Conservation
- East of England Plan Policies ENG1, ENG2, WAT1, WAT4 and ENV1-7
- Strategic Flood Risk Assessment
- Greater Norwich Integrated Water Cycle Study Stage 2b (2009)
- Sustainable Energy Study for the Joint Core Strategy for Broadland, Norwich, and South Norfolk (2009)
- Historic Characterisation and Sensitivity Assessment (Norfolk County Council 2009)
- The Code for Sustainable Homes
- BREEAM: the Environmental Assessment Method For Buildings
- Greater Norwich Development Partnership Green Infrastructure Study (2007)
- Greater Norwich Green Infrastructure Delivery Plan (2009)
- Appropriate Assessment of the JCS of Broadland, Norwich and South Norfolk
- Norfolk Biodiversity Partnership: Norfolk Ecological Network (2007)
- CNC Building Control
Biodiversity Enhancement Areas

Source: Report of Ecological Mapping Network for Norfolk. The Biodiversity areas information shown on this map is indicative only. The map illustrates information about opportunities at a strategic level and does not indicate a constraint on development.

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Broadland District Council - 199022319
Norwich City Council - 199019747
South Norfolk District Council - 100019483
January 2011

Norfolk County Boundary
Greater Norwich Boundary
Urban Areas
Core Area
Buffer fragmented habitats
Extend & link fragmented habitats
Policy 2: Promoting good design

All development will be designed to the highest possible standards, creating a strong sense of place.

In particular development proposals will respect local distinctiveness including as appropriate:

- the historic hierarchy of the city, towns and villages, maintaining important strategic gaps
- the landscape setting of settlements including the urban/rural transition and the treatment of ‘gateways’
- the landscape character and historic environment, taking account of conservation area appraisals and including the wider countryside and the Broads area
- townscape, including the city and the varied character of our market towns and villages
- provision of landscaping and public art
- the need to ensure cycling and walking friendly neighbourhoods by applying highway design principles that do not prioritise the movement function of streets at the expense of quality of place
- the need to increase the use of public transport, including through ‘public transport oriented design’ for larger development
- designing out crime
- the use of sustainable and traditional materials
- the need to design development to avoid harmful impacts on key environmental assets and, in particular SACs, SPAs and Ramsar sites

This will be achieved by ensuring that:

- major development areas providing over 500 dwellings or 50,000m2 of non-residential floorspace, and areas of particular complexity will be masterplanned using an inclusive, recognised process demonstrating how the whole scheme will be provided and ensuring that it is well related to adjacent development and infrastructure
- all residential development of 10 units or more will be evaluated against the Building for Life criteria published by CABE (or any successor to this standard), achieving at least 14 points (silver standard)
- Design and Access Statements for non residential development will show how the development will meet similar high standards

Contributes to spatial planning objectives 8, 9, 10 and 11

5.10 Good design can make the difference between a high quality and successful development and a mediocre or unsuccessful one. Development at any scale and location should make a positive contribution to providing better places for people. The quality of the local environment plays a crucial role in the economic success of the area. Research undertaken by the Work Foundation found that only a limited number of city regions, such as Norwich, have the prerequisites to promote the knowledge economy. These include a high quality environment. The research concludes that cities like Norwich should build on their strengths and promote local distinctiveness through high quality design. This promotes knowledge economies both tangibly, through physical improvements, and intangibly, by
developing a reputation as a good place to do business. With the scale of development required, it is particularly important that the highest possible standards are achieved. The East of England Plan places particular emphasis on the importance of the historic environment of Norwich, and values the market towns and villages.

5.11 The Norwich area is of unusual landscape complexity where five distinct countryside character areas converge. A number of areas are of special historic and cultural significance. The urban edge is particularly sensitive and extensions to urban areas, whether of Norwich or the market towns, should take account of the need to enhance its character, appearance, recreational potential and biodiversity value. The ‘gateways’ are places where landscape and townscape changes, such as where the countryside and urban area meet, or main entrances into the city centre and town centres, for example, and on the River Yare where the Broads landscape and the Norwich built up area meet at Whitlingham and Trowse. Developers will therefore have to take account of local evidence in preparing their Design and Access Statements, including Landscape Character Assessments and Conservation Area Appraisals as appropriate.

5.12 Masterplanning for large-scale developments and areas of particular complexity (for example within the city centre) must embrace the principles of urban design, and must also examine carefully how development, including infrastructure, can be progressed logically and implementation in full can be ensured. Further guidance on the inclusion of public art will be developed through masterplans and local development documents.

5.13 To ensure the required high standards are achieved, residential development will apply the Building for Life model of residential design excellence, produced by CABE and the Home Builders Federation. At least a ‘silver standard’ will be expected. Though achieving the highest level is not a policy requirement, it is anticipated that over time an increasing proportion of development will achieve the ‘gold standard’. Many of the principles set out in Building for Life are applicable to non-residential development, and a similar approach will be adopted when assessing development proposals. National standards, if defined, will be adopted for this assessment.

References
05 Area-wide policies, Policy 2
- Planning Policy Statement 5 (PPS 5) Planning for the Historic Environment
- Broadland Landscape Character Assessment
- South Norfolk Conservation Area Appraisals
- Norwich City Centre Conservation Area Appraisals
- Design and Access Statements: How to write and use them
- Creating successful masterplans
- Building for Life
- Ideopolis: Knowledge City Regions (2006)
- Manual for Streets
- Planning Policy Statement 1 (PPS1): Delivering Sustainable Development
- East of England Plan
- Historic Characterisation and Sensitivity Assessment (Norfolk County Council 2009)
Policy 3: Energy and water

Energy

Development in the area will, where possible, aim to minimise reliance on non-renewable high-carbon energy sources and maximise the use of decentralised and renewable or low-carbon energy sources and sustainable construction technologies. To help achieve this:

- All development proposals of a minimum of 10 dwellings or 1,000sqm of non-residential floorspace will be required (a) to include sources of ‘decentralised and renewable or low carbon energy’ (as defined in the glossary) providing at least 10% of the scheme’s expected energy requirements and (b) to demonstrate through the Design and Access Statement for the scheme whether or not there is viable and practicable scope for exceeding that minimum percentage provision.

- In addition to the above requirement, detailed proposals for major developments (minimum of 500 dwellings or 50,000sqm of non-residential floorspace) will be required to demonstrate through the Design and Access Statement that the scheme has seized opportunities to make the most of any available local economies of scale to maximise provision of energy from sources of ‘decentralised and renewable or low carbon energy sources’.

- All development proposals of a minimum of 10 dwellings or 1,000sqm of non-residential floorspace will be required to demonstrate, through the Design and Access Statement, that all viable and practicable steps have been taken to maximise opportunities for sustainable construction.

Other Development Plan Documents will allocate land for renewable energy development.

Provision will be made for strategic enhancement of the electricity and gas supply networks to support housing and employment growth. This will include major investment in existing electricity substations in central Norwich and to the east of Norwich.

Water

The release of land for development will be dependent on there being sufficient water infrastructure to meet the additional requirements arising from the new development and to ensure that water quality is protected or improved, with no significant detriment to areas of environmental importance. This will be achieved by greater efficiency and by providing infrastructure, including strategic interceptor sewers, to address environmental and capacity constraints at the strategic wastewater treatment works at Whitlingham and at local works. This water infrastructure will be upgraded as required and be operational in time to meet the demands of any development.

To ensure all housing is water efficient, new housing development must reach Code for Sustainable Homes level 4 for water on adoption of this document and developments of over 500 dwellings must reach code level 6 by 2015.

All other development should also seek to maximise water efficiency.

Contributes to spatial planning objectives 1, 6, 7 and 9
5.14 The East of England Plan sets a target that 17% of the region’s energy should come from onshore renewable sources by 2017, while regional water efficiency targets require a 25% reduction in water use in new development compared with 2006 minimum standards and an 8% reduction in water use for existing housing.

5.15 Development in the area will be consistent with any current national standards relating to renewable or low carbon energy generation and the use of sustainable building technologies. In addition, schemes of a minimum of 10 dwellings or 1,000sqm of non residential floorspace will be required to demonstrate through the related Design and Access Statement that (a) provision is made for at least 10% of the development’s energy requirements to come from sources of decentralised and renewable or low carbon energy and (b) all viable and practicable steps have been taken to maximise opportunities for sustainable construction. In addition, the Design and Access Statement for any larger development, as defined in policy 3, will need to show that the scheme has made the most of any available local economies of scale to maximise the proportion of its energy derived from sources of decentralised and renewable or low carbon energy. Combined heat and power [CHP] and district heating/cooling networks may be the most cost effective ways of achieving these economies. Greater Norwich Development Partnership will promote local energy generation through the establishment of Energy Service Companies (ESCOs), possibly with community ownership.

5.16 Other Development Plan Documents and Supplementary Planning Documents will give further advice on these matters. These will use the relevant government definition of zero-carbon when this is available and adopted.

5.17 Water quality and availability are a key issue locally. The Water Cycle Study provided initial advice on the best locations for development in relation to water and wastewater infrastructure and subsequently identified the infrastructure required to deliver the Joint Core Strategy. The study has concluded that investment will be required for existing wastewater treatment works to ensure that there is sufficient treatment capacity to meet needs and that water quality in the sensitive river basin which includes the Broads is not detrimentally affected.

5.18 New sewerage capacity will be required to link development to the local wastewater treatments works and for strategic connections to the key wastewater treatment works at Whitlingham and off-grid provision. This sewerage capacity will be required to be routed away from the sewers in the city centre which are near to their present capacity.

5.19 Development in Norwich, and at the strategic growth locations at Hethersett, Cringleford, Easton/Costessey and any allocations which may be made to the north west of Norwich, may be required to contribute financially to the provision of strategic sewers linking to Whitlingham. Development will need to progress in tandem with their provision.

5.20 The Water Cycle Study showed that existing water supplies must be used as efficiently as possible in this area of low rainfall and of water stress. The study also showed that sustainable water infrastructure, such as greywater recycling and rainwater harvesting, can be implemented more effectively on larger developments, but is less cost effective at the smaller scale. Therefore, in the light of the study, level 4 Code for Sustainable Homes water
standards are required in smaller scale housing development and level 6 standards are required in larger scale housing developments over 500 homes.

5.21 In the longer term, further investment will be required in new water resource schemes along with water supply infrastructure in order to provide sufficient potable water to the major growth areas.

References

05 Area-wide policies, Policy 3

- East of England Plan Policies ENG1, ENG2, WAT1, WAT2 and WAT3
- Sustainable Energy Study for the Joint Core Strategy for Broadland, Norwich, and South Norfolk (2009)
- Greater Norwich Integrated Water Cycle Study Stage 2b (2009) and Final (Feb 2010) with Stakeholder Position Statements
- Greater Norwich Infrastructure Needs and Funding Study (2009)
- Planning Policy Statement 1(PPS1) Delivering Sustainable Development
- Planning Policy Statement: Planning and Climate Change Supplement to Planning Policy Statement 1
Policy 4: Housing delivery

Allocations will be made to ensure at least 36,820 new homes can be delivered between 2008 and 2026, of which approximately 33,000 will be within the Norwich Policy Area (NPA – defined in Appendix 4), distributed in accordance with the Policies for Places.

Housing mix

Proposals for housing will be required to contribute to the mix of housing required to provide balanced communities and meet the needs of the area, as set out in the most up to date study of housing need and/or Housing Market Assessment.

Affordable Housing

A proportion of affordable housing, including an appropriate tenure mix, will be sought on all sites for 5 or more dwellings (or 0.2 hectares or more). The proportion of affordable housing, and mix of tenure sought will be based on the most up to date needs assessment for the plan area. At the adoption of this strategy the target proportion to meet the demonstrated housing need is:

- On sites for 5-9 dwellings (or 0.2 – 0.4 ha), 20% with tenure to be agreed on a site by site basis (numbers rounded, upwards from 0.5)
- On sites for 10-15 dwellings (or 0.4 – 0.6 ha), 30% with tenure to be agreed on a site by site basis (numbers rounded, upwards from 0.5)
- On sites for 16 dwellings or more (or over 0.6 ha) 33% with approximate 85% social rented and 15% intermediate tenures (numbers rounded, upwards from 0.5)

The proportion of affordable housing sought may be reduced and the balance of tenures amended where it can be demonstrated that site characteristics, including infrastructure provision, together with the requirement for affordable housing would render the site unviable in prevailing market conditions, taking account of the availability of public subsidy to support affordable housing.

At appropriate settlements, sites that would not normally be released for housing will be considered for schemes that specifically meet an identified local need for affordable homes. Such schemes must ensure that the properties are made available in perpetuity for this purpose.

Housing with care

Mixed tenure housing with care will be required as part of overall provision in highly accessible locations. In particular provision will be required in Norwich, and the major growth locations of Old Catton, Sproston, Rackheath and Thorpe St Andrew growth triangle, Cringleford, Hethersett, Wymondham and Long Stratton, and at Aylsham, Acle and Wroxham.

Gypsies and Travellers

Provision will be made for a minimum of 58 permanent residential pitches for Gypsies and Travellers between 2006 and 2011 to ensure full conformity with Regional Spatial Strategy Policy H3. These will be provided on the following basis: Broadland 15, Norwich 15, and South Norfolk 28.

Between 2012 and 2026, an additional minimum 78 permanent residential pitches will be
These will be provided on a number of sites. Generally sites will not have more than 10 to 12 pitches, but may be varied to suit the circumstances of a particular site. The sites will be provided in locations which have good access to services and in locations where local research demonstrates they would meet the needs of the Gypsy and Traveller communities. Some of the allowance to be provided after 2011 is expected to be provided in association with large-scale strategic housing growth.

In addition, 17 transit pitches will be provided, with the expectation that these will be provided by 2011. These will generally be in locations providing good access to the main routes used by Gypsies and Travellers, such as the A11, A47, A140 and A 143/A1066. Again, sites would not normally be expected to accommodate more than 10 to 12 pitches.

Research also shows the need for additional plots for Travelling Show People. The expectation is that 15 additional plots will be provided by 2011 and a further 12 between 2012 and 2026. These will be located on sites within the Norwich urban area, or if sites within the urban area cannot be identified, with easy access to it.

The Government has signalled its intention to revoke the Regional Spatial Strategy. When this is enacted new targets for permanent residential and transit pitches for the period after 2011 will be set, based on local evidence.

Contributes to spatial planning objective 2

5.22 The planned level of housing growth is required to address housing need and support the growth potential of the local economy. The Norwich Policy Area (NPA) is a longstanding local planning area used to ensure that growth needs arising from the Norwich urban area are addressed as close to it as possible. The table on page 37 illustrates the distribution of growth between the NPA and remaining parts of Broadland and South Norfolk. Provision is made for the period up to 2026 to meet the requirement in PPS 3 to have a 15-year housing land supply at the point of adoption. New allocations in the NPA will total to a minimum of 21,000 dwellings. Outside the NPA new allocations for the majority of individual locations are expressed as a range. The extent to which delivery of housing is meeting these requirements will be monitored using housing trajectories for the three district area and the NPA (Appendix 6).

5.23 The Evidence base for the housing market assessment looks at housing requirements for the period 2006-2011. This indicated a short term need across all tenures for dwellings in the following size ranges:

- 1 bedroom 13%-17%
- 2 bedroom 29%-33%
- 3 bedroom 35%-36%
- 4 bedroom+ 19%-20%

5.24 We recognise that such assessments can only look a short period ahead and the mix of house types further into the strategy period will be informed by future research.
To meet the existing and future needs of the community, developments will provide a mix of sizes, types and tenures appropriate to the location. Provision will also be made for specialist housing such as supported housing, care facilities and retirement communities. The mix of house types and tenures will be based on the most up-to-date evidence at the time applications are made and also aim to ensure a reasonable balance in any local area.

5.26 Affordable housing is defined as ‘housing provided for rent, sale or shared equity at prices permanently below the current market rate, which people in housing need are able to afford’.

5.27 It is difficult to estimate the need for affordable homes over the long term to 2026. However, based on the findings of the most recent assessment of housing need across the three Districts (2006, updated in 2009), the requirement for affordable dwellings over the period 2008-2026 is estimated to be of the order of 11,860. This equates to just over 33% of the JCS total housing provision during that time.

5.28 The policy target is for 33% affordable housing on schemes of 16 dwellings or more, 30% on schemes of 10-15 dwellings and 20% in schemes of 5-9 dwellings. These tapered requirements for schemes below the national indicative threshold of 15 dwellings in PPS3 recognise that much development takes place on smaller sites and that without appropriate contributions from such schemes there would be a significant undersupply of affordable housing against the identified need. The Drivers Jonas Deloitte study 2010 and subsequent outputs of the model show a reasonable prospect that the above requirements are likely to be viable (without grant) in a significant proportion of cases in the various market scenarios which may prevail over the course of the plan period.

5.29 It is recognised that affordable housing provision through this policy is dependent upon the overall viability of development. In turn this depends upon a wide range of site specific circumstances. Where a developer suggests that site viability does not permit full provision at the level required by the policy this position will need to be demonstrated through the use of an open-book process employing an appropriate toolkit or model before
any agreement is made to reduce the proportion of affordable homes and/or amend the mix of tenures. Where possible, contributions from any available public funds such as a grant from the Homes and Communities Agency (HCA) will be sought to bring marginal or unviable schemes to viability. In order to create mixed communities, affordable housing provided as part of a market development will be expected to be integrated within the site.”

5.30 From the needs assessment referred to above, the long-term required tenure mix is estimated to be about 60% social rented/40% intermediate tenures across the JCS area as a whole. This mix varies across the JCS area with the greatest need for social rented accommodation in the urban area of Norwich. Negotiations over the provision to be made by individual schemes will take account of these variations in tenure needs over place and time.

5.31 Policy on affordable housing will be regularly monitored, including (a) the outcomes of policy 4, (b) changing needs for affordable housing and the relevant tenure mix, and (c) the viability of provision. If necessary, the policy will be formally reviewed.

5.32 Provision will also be made for affordable homes to meet a demonstrated local need on sites that would not otherwise be released for housing. These ‘exceptions’ sites may be allocated through Site Specific Policies or could come forward when a specific need is demonstrated in a particular settlement or group of settlements. Exceptions site allocations will be considered in settlements classified in the hierarchy as Other Villages or above, whilst applications will also be considered in other locations if appropriate. On the evidence of recent achievements and the programme schemes in mid 2010, this is likely to produce about 1170 affordable homes between 2008 and 2026, though this is subject to the availability of funding.

5.33 Norfolk County Council Adult Social Services indicate that in excess of 500 additional housing with care dwellings (also known as extra care housing) will be required across the area by 2026. As with general housing mixed tenure schemes will be required. Developments should be in highly accessible locations so that residents have easy access to local services and other facilities but also where the older population of the surrounding area can access services provided within the Housing with Care scheme.

5.34 A partial revision to the East of England Plan in 2009 set requirements for the provision of pitches to meet the needs of Gypsies and Travellers in accordance with the requirements of Government Circular 01/2006. The target set was for 58 net additional pitches across the GNDP area to be provided by 2011. Beyond this the East of England Plan set an approach to longer term provision based on extrapolation which equated to a need for an additional 78 pitches between 2012-2026. The targets up to 2011 were broadly supported by the Greater Norwich Development Partnership authorities who considered them reasonable in the light of the Norfolk wide Gypsy and Traveller Accommodation Needs Assessment undertaken in July 2007. However, beyond 2011 the proposed approach was disputed and the local authorities consider this level of need would be better determined by updated local evidence. It should be noted that a pitch represents a family unit and may therefore accommodated more than one caravan. On average about 1.7 caravans occupy each pitch. Since 2006, 11 pitches have been permitted or completed in Broadland, 14 in South Norfolk and an application for a further 3 is pending in Norwich.
5.35 The Gypsy and Traveller population is diverse, and in order to recognise the differing needs and wishes of different groups, it is proposed that the need for pitches should be met in a number of locations. It is therefore suggested that sites would not normally exceed ten to twelve pitches, though there may be variations in this to suit the circumstances of a particular site.

5.36 A range of tenure arrangements will be sought, including, for example, private ownership by Gypsies and Travellers and management by housing associations.

5.37 There is a large existing site for Travelling Show People in Norwich, which is fully occupied, and local evidence suggests there is a need for further accommodation. Each plot will need to include room for vehicles providing accommodation and also for the maintenance and storage of fairground rides and equipment.

References
05 Area-wide policies, Policy 4
- Planning Policy Statement 3 (PPS3) Housing
- East of England Plan Policies H1-H3
- Greater Norwich Housing Strategy 2008-2011
- Greater Norwich Housing Market Assessment
- Greater Norwich Housing Market Assessment Update – November 2009 (Completed Jan 2010)
- Greater Norwich Sub-Region Evidence Base for a Housing Market Assessment
- Norwich City Council Affordable Housing Viability Testing June 2009
- East of England Forecasting Model Spring 2010
Policy 5: The economy

The local economy will be developed in a sustainable way to support jobs and economic growth both in urban and rural locations. This will:

- provide for a rising population and develop its role as an engine of the wider economy
- facilitate its job growth potential with a target at least 27,000 additional jobs in the period 2008-2026
- increase the proportion of higher value, knowledge economy jobs while ensuring that opportunities are available for the development of all types and levels of jobs in all sectors of the economy and for all the workforce

Sufficient employment land will be allocated in accessible locations consistent with the ‘Policies for places’ in this strategy to meet identified need and provide for choice. In particular:

- the needs of small, medium and start-up businesses will be addressed through the allocation of new smaller scale employment sites and the retention of, and the potential expansion of, a range of existing small and medium employment sites across the area and by requiring the provision of small-scale business opportunities in all significant residential and commercial developments. Flexible building design and innovative approaches will be sought in new and existing residential developments to encourage local working and business opportunities
- larger scale needs will be addressed through the allocation of sufficient land to provide a choice and range of sites. Development Plan Documents and investment strategies will ensure that a readily available supply of land is maintained throughout the Joint Core Strategy period
- investment strategies will focus on overcoming constraints to the release and development of key sites
- land identified for employment uses on proposals maps will only be considered for other uses that are ancillary and supportive to its employment role. Employment land with potential for redevelopment for other uses will be identified in supporting DPDs or SPDs

Opportunities for innovation, skills and training will be expanded through:

- facilitating the expansion of, and access to, vocational, further and higher education provision
- encouraging links between training/education provision and relevant business concentrations including co-location where appropriate
- support for enterprise hubs at Norwich Research Park, the University of East Anglia, EPIC (East of England Production Innovation Centre), and Hethel, and at easily accessible locations in the area

Tourism, leisure, environmental and cultural industries will be promoted. This will be assisted by:

- the general emphasis of the Joint Core Strategy on achieving high quality design, resource efficiency, environmental enhancement and retention of local distinctiveness
- implementation of the green infrastructure network
- encouragement for appropriate development including sustainable tourism initiatives
- encouragement for development that creates a supportive environment for cultural
industries
• promotion of the creative industries cluster
• support for cultural initiatives including festivals

The rural economy and diversification will also be supported by:
• a preference for the re-use of appropriate redundant non-residential buildings for commercial uses, including holiday homes to support the tourism industry (affordable housing may be an acceptable alternative use)
• promotion of farmers markets, farm shops and cottage industry, including e-commerce in villages
• the development of a flagship food and farming hub serving the needs of Norfolk and supporting the agri-food sector in and around greater Norwich
• promoting the development of appropriate new and expanded businesses, which provide either tourism or other local employment opportunities

*Contributes to spatial planning objectives 1, 3, 4, 8 and 9*

5.38 Achieving the full economic potential of the area is dependent on improved connectivity, including the implementation of the priorities set out in the sustainable transport policy and maintaining and enhancing the environment and quality of life in the area. Research suggests that the local economy has the potential to provide sufficient jobs to support the level of housing growth proposed. Indeed jobs growth will be dependent on housing growth. Jobs and employment potential should be a key priority when considering any form of development, especially rural development.

5.39 Enhancing the knowledge economy and promoting innovation will be important across all sectors and parts of the area. However, the expansion of activity at the Norwich Research Park, a refocus on employment and education in and around the city centre, and building on the early success of the Hethel Engineering Centre will play a fundamental role.

5.40 A range and choice of employment sites are allocated and retained, including sites suitable for workshop and light industrial type uses.

5.41 Tourism, leisure, and cultural industries are recognised as crucial sectors in the local economy that are also fundamental to local quality of life and the attraction and retention of other businesses and staff.

5.42 A food and farming hub will support local agriculture by providing opportunities for local producers to co-ordinate activity and access larger markets, provide a focus for ancillary supporting businesses and suppliers, and an opportunity for the re-location of the livestock market. Any proposal will need to be carefully located and controlled to ensure it fulfils this role in a sustainable way, with any retailing fulfilling an appropriate role in the retail hierarchy.

5.43 A wide range of businesses can be appropriate in rural areas, either because they are of a scale that is appropriate to a small town or village, they serve local needs or because they have a particular connection to the area such as rural leisure and tourism.
References
05 Area-wide policies, Policy 5
- PPG4 Industrial, commercial development and small firms
- PPS7 Sustainable development in rural areas
- East of England Plan Policies E1-E6
- East of England Regional Economic Strategy
- Greater Norwich Economic Strategy 2009-2014
- Employment Growth and Sites and Premises Study (2008)
- Feasibility Study for a Conference Centre and Concert Hall for the Greater Norwich Area (2009)
Policy 6: Access and transportation

The transportation system will be enhanced to develop the role of Norwich as a Regional Transport Node, particularly through the implementation of the Norwich Area Transportation Strategy, and will improve access to rural areas. This will be achieved by:

- implementation of the Norwich Area Transportation Strategy (NATS) including construction of the Northern Distributor Road (NDR)
- significant improvement to the bus, cycling and walking network, including Bus Rapid Transit on key routes in the Norwich area
- enhancing the Norwich Park & Ride system
- promoting enhancement of rail services, including improved journey time and reliability to London and Cambridge, and innovative use of the local rail network
- provision of an A140 Long Stratton Bypass
- promoting improvements to the A11 and A47
- supporting the growth and regional significance of Norwich International Airport for both leisure and business travel to destinations across the UK and beyond
- concentration of development close to essential services and facilities to encourage walking and cycling as the primary means of travel with public transport for wider access
- provision of IT links, telecommunications and promotion of home working
- protection of the function of strategic transport routes (corridors of movement)
- continued investigation of and support for rail freight opportunities
- continuing to improve public transport accessibility to and between Main Towns and Key Service Centres
- promoting local service delivery
- continuing to recognise that in the most rural areas the private car will remain an important means of travel

Fast broadband connections will be promoted throughout the area. All new development must demonstrate how it contributes to this objective.

Contributes to spatial planning objectives 1, 3, 4, 6, 7 and 11

5.44 The transport strategy will promote sustainable economic development, improve local quality of life, reduce the contribution to climate change, promote healthy travel choices and minimise the need to use the private car. Social exclusion, deprivation and isolation will be reduced and accessibility for all to jobs, services and facilities enhanced.

5.45 Implementation of NATS including the NDR is fundamental to the delivery of this strategy. Significant improvement to public transport, walking and cycling in Norwich can only be achieved with the road capacity released by the NDR which also provides necessary access to key strategic employment and growth locations. The corridor currently protected (100m either side of the centre line of the current scheme) and the associated Postwick Hub will be shown on the Broadland District Council adopted Proposals Map.

5.46 Improved strategic links to the rest of the region and beyond and access to jobs, services and facilities across the area are also key to the success of this JCS. Good
strategic access reduces the perceived isolation of Norfolk. Improvements help stimulate and enhance the local economy and make the area more attractive for inward investment. In some instances the Joint Core Strategy may be able to deliver improvements, but it is often the case that improvements to infrastructure providing longer distance strategic links have to be delivered by outside agencies such as Network Rail and the Highways Agency. The JCS will ensure that it promotes these improvements by providing a context for them to occur and ensuring their importance is recognised. Any significant negative impacts of transport improvements will need to be addressed by appropriate mitigation measures.

5.47 Strategic improvements that are required to deliver growth and facilitate modal shift are:
- NATS/NDR. The NDR is recognised in the East of England Plan. Prior to changes in regional planning and government funding regimes, the NDR was supported through the Regional Funding Allocation and achieved ‘programme entry’ status. It is a major scheme in the Local Transport Plan and is included in the Department for Transport’s Development Pool.
- Junction improvements, including public transport priority, on the A47 Norwich Southern bypass, in particular at Longwater, Thickthorn and Postwick
- A140 Long Stratton Bypass will be funded mainly by housing and commercial development

5.48 Supported strategic improvements to aid delivery and economic success are:
- A11 dualling at Elveden, programmed for 2013
- A47 improvements to reduce the significant stretches that remain single carriageway
- Improvement to rail services to London to reduce journey times and improve reliability
- Further improvements to services on the Ely/Cambridge line
- The implementation of the East West rail link to provide enhance services to central, southern and western England
- Further improvements to services on the Bittern and Wherry Lines including new stations at Rackheath and Broadland Business Park and the investigation of tram train services
- Improvements to Norwich International Airport to expand business opportunities and provide for a wide range of international and domestic destinations

5.49 The levels of growth in the Joint Core Strategy will require that the consequent need to travel is managed. Travel planning and smarter choices initiatives will be promoted to ensure that all residents have good access to local jobs, services and facilities, preferably by either walking or cycling will reduce the need to travel and promote healthier lifestyles. For longer trips and in rural areas where there are fewer local services and employment opportunities, public transport will be promoted. To comply with sustainability objectives public transport will be prioritised, particularly in the urban areas. To meet the diversity of travel need, there has to be new and innovative ways of providing public transport including:
- High quality rapid bus services, in and around the city
- Maximising the use of the local rail network to serve existing communities and locations for large-scale growth
- Promotion and wider use of community transport schemes
- Greater use of non-scheduled services such as flexi-bus and dial-a-ride services
5.50 In rural areas there will remain a reliance on the private car, but the impacts on the
Norwich urban area can be minimised by promotion and improvement of the already
extensive network of Park and Ride sites which are an integral part of the NATS. Rural car
dependency will be monitored and ameliorated by the development of appropriate transport
and planning responses.

5.51 Fast broadband connections and telecommunications are an increasingly important
requirement to serve all development. New development should contribute to the creation
of a comprehensive and effective network in both urban and rural areas to promote
economic competitiveness and to reduce the need to travel.

References
05 Area-wide policies, Policy 6
• Planning Policy Guidance 13 (PPG13) Transport
• Norfolk’s 2nd Local Transport Plan (2006-2011)
• Norwich Area Transportation Strategy
• East of England Regional Assembly: Regional Funding Allocation
• East of England Plan Policies T1-T15 and NR1
• JCS Transport Strategy Report (Jan 2010)
• Baseline Conditions Report – JCS Submission (January 2010)
Policy 7: Supporting communities

All development will be expected to maintain or enhance the quality of life and the well-being of communities and will promote equality and diversity, and protect and strengthen community cohesion.

In order to deliver thriving communities, tackle social deprivation and meet diverse needs across the area, a multi-agency approach will be required to ensure that facilities and services are available as locally as possible, considering the potential for co-location, and are accessible on foot, by cycle and public transport.

Health

Appropriate and accessible health facilities and services will be provided across the area including through new or expanded primary health facilities serving the major growth locations. Health Impact Assessments will be required for large-scale housing proposals. Provision will be made for the expansion of the Norfolk and Norwich University Hospital to meet the needs of growing communities.

Healthier lifestyles will be promoted by maximising access by walking and cycling and providing opportunities for social interaction and greater access to green space and the countryside.

An expansion of care home provision specialising in dementia care will be required with particular needs in Norwich, the north and west of Broadland NPA, Wymondham, Long Stratton and Loddon and/or Poringland. Additional care homes with nursing provision are mostly required in Norwich or its immediate environs, with some provision needed in Acle, Wymondham/ Long Stratton/Loddon.

Crime

New police facilities will be provided to serve areas of major growth and areas which are deficient. Development will be well designed, to include safe and accessible spaces where crime and fear of crime are minimised.

Education

Provision will be made for sufficient, appropriate and accessible education opportunities for both residents and non-residents, including:

- wider community use of schools, including through design
- new primary and new or expanded secondary schools to serve the major growth locations
- promoting the ‘learning city’ role of Norwich by facilitating the continuing enhancement of tertiary education facilities including the University of East Anglia, the Norwich University College of the Arts, City College and Easton College

Community infrastructure and cohesion

Provision will be made to ensure equitable access to new and improved community halls, including new provision on major developments. This will provide facilities for use by a wide range of groups, including faith communities. Expanded library provision will be made including through new or expanded facilities in major growth locations.
Integration and cohesion within and between new and existing communities will be promoted including through support for community development workers and the early engagement of existing communities in the design process.

Contributes to spatial planning objectives 1, 4, 5, 6, 7, 8 and 10

| 5.52  | Growth will generate a range of service needs throughout the area, particularly concentrated within the major growth locations. Enhancing quality of life for existing and new communities requires a range of agencies to work together and with developers. Developers must demonstrate they are working within these expectations. Forward planning and joint working should facilitate early provision of infrastructure to support the needs of new and growing communities. The needs of faith groups will be considered in new development and use of shared buildings provided for the community will be without discrimination. Opportunities for people to meet formally and informally will also be an important part of positively promoting healthy and cohesive communities. |
|       | Evidence from consultation suggests that over 1,000 additional specialist dementia care homes and care homes with nursing places addressing various needs will be required by 2026. The largest need will be within Norwich. |

**References**

05 Area-wide policies, Policy 7
- Greater Norwich Infrastructure Needs and Funding Study (2009)
- Broadland Community Partnership Strategy and Action Plan
- A New Vision for Norwich: The Sustainable Community Strategy
- Your Sustainable Community Strategy for South Norfolk
- Norfolk Ambition – The Sustainable Community Strategy for Norfolk
- Broadland Culture and Leisure Strategy
- South Norfolk Leisure/Culture and Countryside Strategy
Policy 8: Culture, leisure and entertainment

The cultural offer is an important and valued part of the area. Existing cultural assets and leisure facilities will be maintained and enhanced. The development of new or improved facilities including those supporting the arts, street events, concerts and the creative industries sector will be promoted.

Cultural heritage will be enriched through use of innovative design and art in the public realm.

Development will be expected to provide for local cultural and leisure activities, including new or improved built facilities, provide for a range of activities including performance space, and/or access to green space, including formal recreation, country parks and the wider countryside.

Contributes to spatial planning objectives 3 and 8

5.54 Norwich and the surrounding area benefits from an abundance of cultural assets of national and international importance ranging across the arts, museums, festivals, architecture, landscape and heritage. While there is a particular concentration of such assets in the city centre they are also to be found throughout the rest of the area. The creative industries sector is a key component of the local economy with potential for growth. Cultural significance is not limited to the ‘high brow’ and the overall offer includes such assets as locally valued buildings, spaces and events, the Royal Norfolk Show, Norwich City Football Club and Norwich Market.

5.55 The cultural offer of the area, and its increasing diversity, fundamentally underpins local identity, economic success, creativity and the quality of life for residents and visitors.

References
05 Area-wide policies, Policy 8
- Feasibility Study for a Conference Centre and Concert Hall for the Greater Norwich Area (2009)
06 Policies for places

Policies 9 to 19 apply to defined parts of the plan area

Introduction
6.1 Norwich is one of the largest and most important urban centres in the East of England with the potential to contribute significantly to the country's growth and economic development needs. A Norwich Policy Area is defined to provide a focus for planning and co-ordinating Norwich related growth. The Joint Core Strategy area is also characterised by its small towns and villages and this part of the strategy provides guidance to meet their development needs.

6.2 The policies of the Joint Core Strategy distribute growth according to the following settlement hierarchy:
   1. Norwich urban area. The existing urban area includes the built-up parts of the urban fringe parishes of Colney, Costessey, Cringleford, Trowse, Thorpe St Andrew, Sprowston, Old Catton, Hellesdon, Drayton and Taverham
   2. Main Towns
   3. Key Service Centres
   4. Service Villages
   5. Other Villages
The policies refer to settlements which in some cases may extend into adjacent parishes.

6.3 The scale of development generally decreases at each level of this hierarchy. However, within the Norwich Policy Area well located and serviced settlements have, in some instances, been identified for a larger scale of growth than their rural counterparts. Large-scale mixed-use developments in the Norwich Policy Area are provided in a major urban extension in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle and at Cringleford, Easton/ Costessey, Hethersett, Long Stratton and Wymondham.
Policy 9: Strategy for growth in the Norwich Policy Area

The Norwich Policy Area (NPA) is the focus for major growth and development. Housing need will be addressed by the identification of new allocations to deliver a minimum of 21,000 dwellings distributed across the following locations:

- Norwich City Council area: 3,000 dwellings
- Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle: 7,000 dwellings by 2026 continuing to grow to around 10,000 dwellings eventually
- Easton/Costessey: 1,000 dwellings
- Cringleford: 1,200 dwellings
- Hethersett: 1,000 dwellings
- Long Stratton: 1,800 dwellings
- Wymondham: 2,200 dwellings
- Broadland smaller sites in the NPA: 2,000 dwellings
- South Norfolk smaller sites in the NPA and possible additions to named growth locations: 1,800 dwellings

Allocations to deliver the smaller sites in Broadland and South Norfolk will be made in accordance with the settlement hierarchy and local environmental and servicing considerations.

All the numbers above show the minimum number of dwellings to be delivered in each location.

Transport infrastructure required to implement NATS, deliver growth and support the local economy will include:

- construction of the NDR to provide strategic access, significantly improve quality of life and environmental conditions in the northern suburbs and nearby villages, and provide capacity for comprehensive improvements for buses, cycling and walking as well as facilitating economic development
- significant improvement to the bus, cycling and walking network, including Bus Rapid Transit on key routes in the Norwich area linking major growth locations, strategic employment areas and the city centre
- enhancing the Norwich Park & Ride system
- new rail halts at Broadland Business Park and Rackheath (innovative new services will be investigated on the Wymondham – Norwich – Wroxham axis)
- junction improvements on the A47 Norwich Southern Bypass
- a Long Stratton Bypass
- parking restraint in areas with good standards of public transport accessibility especially in and around the city centre

Opportunities will be sought to enhance green infrastructure throughout the area, with particular emphasis on priority areas.

Employment development at strategic locations will include:

- significant expansion of office, retail and leisure provision in the city centre. Land will be identified to deliver a net increase at least 100,000m2 of new office floorspace
• significant expansion of health, higher education and, in particular, science park activity at the University of East Anglia/Norwich Research Park. A first phase of around 55ha will provide for uses limited to those appropriate for a science park (principally use class B1(b)) with further phases dependent on the achievement of this vision. In view of the specific nature of the employment sought in this location, including the need to dovetail with the aims of significant and diverse existing institutions, detailed proposals will be developed through the preparation of development plan documents.
• a new business park of around 30ha associated with the Airport and focussed on uses benefiting from an airport location
• an extension to Broadland Business Park of around 25ha for general employment uses
• consolidation of activity at Longwater through intensification and completion of the existing allocation
• new general employment opportunities at Wymondham including a new allocation of around 15ha
• expansion of activity at Hethel including a technology park of around 20ha managed to focus on advanced engineering and the growth of technology capabilities
• new employment development to serve local needs of major growth locations including around 25ha of new employment land at Rackheath

Contributes to spatial planning objectives 1, 2, 4, 6 and 7

6.4 The Regional Economic Strategy identifies the Norwich area as one of seven engines of growth.

6.5 Development is focussed within the established urban area and in sustainable locations elsewhere in the Norwich Policy Area including major greenfield developments. Numerous brownfield sites have been developed in recent years and some further opportunities remain. In the short term, brownfield sites provide a significant proportion of land available for development, but this will decline as fewer become available and large greenfield allocations come on stream.

6.6 The smaller sites allowance is intended to provide a balance between site sizes and locations to encourage flexibility and the shorter term delivery of new housing. The locations of the smaller sites will be decided in accordance with the settlement hierarchy defined in paragraphs 6.2 and 6.3. The smaller sites will be less than the 1000 dwellings or more identified at strategic growth locations, and will reflect the scales of development provided for at each level of the settlement hierarchy described in policies 12, 14, 15 and 16. The allocations will be dependent upon the availability and suitability of sites proposed through the Site Specific Policies and Allocations Development Plan Document production process, and will reflect the form, character and services capacities of each locality.

6.7 The Old Catton, Sprowston, Rackheath and Thorpe St Andrew growth triangle incorporates land at Rackheath promoted for an eco-community under the government’s eco-towns programme and development of the rest of the area will be expected to reflect similar high standards.
6.8 The NDR is the fundamental part of NATS and this growth strategy. By removing traffic from the suburbs and surrounding villages it will improve quality of life and enable significant enhancement of public transport, cycling and walking. The NDR also improves strategic access for residents and businesses over a wide area and facilitates growth, across a wide area.

6.9 Provision for growth is well located to enjoy sustainable access to jobs and services, to be served by existing infrastructure and to bring new infrastructure and services to the benefit of existing communities.

6.10 Evidence prior to the current recession suggested that the overall office floorspace requirement would be around 300,000m². This policy provides for a slightly reduced provision of 250,000m² in the city centre, Norwich Research Park and Broadland Business Park. If required, the remaining office floorspace will be provided through higher levels of development in the city centre, if this proves to be feasible, and small-scale developments associated with housing growth. The primary industrial sites (Use class B2 and B8) will continue to be existing industrial estates based on the Norwich outer ring road, Longwater, the Airport area and existing rural sites, including Hethel and Wymondham. A new employment area is proposed near Norwich International Airport and there will be expansion of employment at Rackheath. Local employment will be expanded in Long Stratton.

6.11 DPDs will ensure that new allocations for employment development on peripheral sites are controlled through appropriate restrictions on use and/or phasing to ensure that they do not undermine the continued use of existing employment sites within the Norwich urban area.

6.12 In the period to 2026 new employment allocations to deliver jobs growth and an expanded knowledge economy will be broadly:

- **City centre**: at least 100,000m² of offices to reinforce the key employment cluster in the area’s most accessible location
- **Norwich Research Park (NRP)**: an expansion of NRP is a fundamental part of the economic strategy for the area. NRP will be developed to provide a ‘Next Generation’ science park seeking to maximise the commercial potential of intellectual property emanating from the research and innovation taking place there, and through attracting inward investment. A first phase of around 55ha will provide around 100,000m² of B1(b) development plus ancillary uses such as restaurants, accommodation, medical, educational, leisure and conference facilities set within landscaped public spaces and recreational areas. Large-scale general employment development will detract from the unique offer and will not be appropriate. A second phase will be released if the initial development fulfils the vision for a science park
- **Airport area**: around 30ha of new business park focussed on a full range of employment uses benefiting from an airport location. DPDs will also ensure that sufficient land is available for aviation related uses
- **Rackheath**: around 25ha of new employment land for a range of employment uses to strengthen the employment role of this location and provide local opportunities for the new community in this area
- **Broadland Business Park**: expansion of around 25ha for a range of employment uses to include approximately 50,000m² B1
• **Wymondham**: a total of around 20ha of employment land for a range of employment uses including new allocations of around 15ha
• **Hethel**: a technology park, with improved accessibility particularly to Wymondham, to provide around 20ha of development focussed on high-tech engineering. Large-scale general employment development will detract from the unique offer and will not be appropriate
• **Longwater**: Longwater remains a strategic employment location but no significant expansion is envisaged
• Small-scale employment opportunities will also be promoted in accordance with the other policies of this strategy

**References**

06 Policies for places, Policy 9

- East of England Plan Policies SS3, SS4 and NR1
- Employment Growth and Sites and Premises Study (2008)
- Norwich Sub Region: Retail and Town Centres Study (2007)
- Norwich Area Transportation Strategy
- East of England Regional Economic Strategy
Relationships between strategic growth locations within the Norwich Policy Area

Key
- Major housing growth & associated facilities
- Strategic employment locations
Policy 10: Locations for major new or expanded communities in the Norwich Policy Area

Major growth in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, and at Cringleford, Easton/Costessey, Hethersett, Long Stratton and Wymondham will be masterplanned as attractive, well-serviced, integrated, mixed use development using a recognised design process giving local people an opportunity to shape development. Development will achieve the highest possible standards of design and aim to address current service and infrastructure deficiencies to benefit existing communities. In addition each major development location will:

- deliver healthy, sustainable communities with locally distinctive design and high quality green infrastructure within the development and contributing to the surrounding network
- provide for a wide range of housing need including giving serious consideration to the provision of sites for Gypsies and Travellers
- seek to achieve a high level of self containment through the provision of services to support the new development while integrating well with neighbouring communities
- achieve a major shift away from car-dependency and be designed around walking and cycling for local journeys and public transport for longer journeys
- include Sustainable Drainage Systems (SuDS), on site or nearby renewable energy generation, for example large-scale wind turbines/farms and biomass fuelled Combined Heat Power and Cooling (CHPC), and water saving technologies
- include new or expanded education provision addressing the needs of the 0-19 age range, local retail and other services, community, police and recreational facilities, small-scale employment opportunities and primary healthcare facilities
- ensure high quality telecommunications and adequate energy supply and sewerage infrastructure.

The developers of major Strategic Growth Locations will be required to ensure there is an ongoing commitment to support community development throughout the period until the development is completed.

Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle
This location will deliver an urban extension extending on both sides of the Northern Distributor Road. Complete delivery of the extension is dependent on implementation of the Northern Distributor Road. However, there is scope for partial delivery, the precise extent of which will be assessed through the Area Action Plan. The structure of the local geography suggests that this new community will take the form of a series of interrelated new villages or quarters and will include:

- at least 7,000 dwellings (rising to a total of at least 10,000 dwellings after 2026)
- a district centre based around an accessible ‘high street’ and including a new library, education and health facilities. This may be provided by building on the proposed centre at Blue Boar Lane or by the creation of a second district centre elsewhere in the Growth Triangle. The development will also require new local centres
- new pre-school provision and up to six new primary schools plus a new secondary school with an initial phase to open as early as possible. To facilitate early provision the early phases of development will concentrate on family housing
- new employment allocations for local needs including expansion of the Rackheath employment area
• retention of existing important greenspaces and significant levels of heathland recreation to provide stepping stones to link Mousehold Heath to the surrounding countryside. Building design including, for example, appropriate use of ‘green roofs’ will help provide linkage between greenspaces
• restoring and conserving historic parkland and important woodland. A significant area north of Rackheath will be provided as green space to act as an ecological buffer zone and ensure no significant adverse impacts on the Broads SAC, Broadland SPA and Broadland Ramsar site
• Bus Rapid Transit to the city centre, possibly via Salhouse Road and Gurney Road, and a choice of safe and direct cycle routes to the centre
• safe and direct cycle and pedestrian routes, and orbital bus services, to Broadland Business Park, Rackheath employment area, airport employment areas and to the surrounding countryside
• new rail halts at Rackheath and Broadland Business Park
• permeability and community integration across the Northern Distributor Road and with existing communities. This will be crucial for the successful development of the area
• a new household waste recycling centre.

A single co-ordinated approach will be required across the whole area. This will be provided through the preparation of an Area Action Plan (or any future equivalent process). More detailed masterplanning will be required for each quarter.

**Wymondham**
This location is dependent on expanded capacity of the A11/A47 Thickthorn junction and will deliver expansion of the town to include:
• at least 2,200 dwellings located in a number of sites providing easy access to local jobs, services and facilities and the town centre whilst maintaining the strategic gap to the north and northeast and the historic setting of the town and abbey
• expansion of the town centre of a quality that will retain and enhance the distinctive character of the existing historic centre
• extensive levels of green infrastructure to create a ‘Ketts Country’ pastoral landscape of grass, wood, hedgerow and wetland habitat. This will also strengthen the importance and role of the Tiffey valley, the landscape setting of the town and strategic gaps, particularly towards Hethersett
• enhanced bus services to the city centre with potential for Bus Rapid Transit also serving Hethersett and/or Cringleford, and improvements to maximise the use of rail connections
• safe and direct cycle and pedestrian routes linking key locations in and around Wymondham including new residential developments, the town centre, the railway station and Gateway 11 business park, and enhanced longer distance cycle access to Hethersett and Norwich Research Park
• enhanced public transport and cycle links to employment expansion at Hethel
• new pre-school provision and a new primary school. Secondary education provision remains to be resolved but may require the relocation of the existing high school to a new site
• expanded household waste recycling facility
Detailed proposals will be developed through the preparation of an Area Action Plan.
Hethersett  
This location is dependent on expanded capacity of the A11/A47 Thickthorn junction and will deliver modest growth to the existing village to include:
- at least 1,000 dwellings located to maintain the strategic gap to the north and south west
- expansion of the existing village services
- education provision remains to be resolved but may require the relocation of the existing junior school and/or high school to new sites plus additional pre-school and primary provision
- enhanced bus services to the city centre with potential for Bus Rapid Transit also serving Wymondham and/or Cringleford
- safe and direct cycle and pedestrian routes around Hethersett and enhanced longer distance cycle access to the city centre, Hethel, Wymondham, Norwich Research Park and the hospital
- Green infrastructure to provide enhanced public access to the countryside

Detailed proposals will be developed through the preparation of the South Norfolk Site Specific Policies Development Plan Document.

Cringleford  
This location is dependent on expanded capacity of the A11/A47 Thickthorn junction and will deliver modest growth to the existing village to include:
- at least 1,200 dwellings
- expansion of the existing services nearby
- new pre-school provision and a primary school within the new development. Secondary education is reliant on the emerging solution at Hethersett
- enhanced bus services to the city centre with potential for bus rapid transit also serving Wymondham, Hethersett and Norwich Research Park
- safe and direct cycle routes to the city centre, Hethel, Norwich Research Park and the Hospital
- Green infrastructure to provide enhanced public access to the countryside and the Yare valley

Detailed proposals will be developed through the preparation of the South Norfolk Site Specific Policies Development Plan Document.

Long Stratton  
It is intended to ensure the delivery of a Long Stratton bypass, and will include:
- at least 1,800 dwellings, the full level and phasing of growth at this location is dependent on overcoming sewerage constraints
- improvements to the town centre including traffic management, environmental enhancement and expanded facilities
- secondary school provision will be provided in, or by the expansion of, the existing school
- investment in strategic green infrastructure corridor reflecting and conserving the ancient landscape to the east of the village
- transport improvements including bus priority at the A140/A47 junction and an enhanced route to the city centre
- safe and direct cycle and pedestrian access to the town centre and employment locations
- additional local employment opportunities
Detailed proposals will be developed through the preparation of an Area Action Plan.

**Easton/Costessey**  
This location is dependent on capacity expansion of the A47 Longwater junction and will provide:
- at least 1,000 dwellings
- enhanced local services. Significant growth at Easton will need to provide an enhanced village centre
- enhanced public access to the Yare valley including creation of a country park at Bawburgh lakes
- Bus Rapid Transit to the city centre via Dereham Road
- enhanced bus and cycle links to city centre, Easton College, Norwich Research Park and to secondary schools
- safe and direct cycle and pedestrian access to Longwater employment and retail area and the Bowthorpe employment area
- secondary education provision remains to be resolved, this may include the relocation or expansion of the existing high school

Detailed proposals will be developed through the preparation of the South Norfolk Site Specific Policies Development Plan Document.

*Contributes to spatial planning objectives 1-12*

6.13 Most of the growth within the plan will be located in the Norwich Policy Area (NPA), where it can be best served by greatly enhanced public transport, walking and cycling. It will not be possible, however, to accommodate all of the Norwich Policy Area growth within the urban area and therefore other locations in the NPA are identified for major mixed use growth. These will be developed in a way that delivers sustainable new communities.

6.14 Growth locations have been selected because they provide the opportunity for easy access to strategic employment opportunities and high quality public transport routes, do not compromise high quality habitats or mineral resources and are not at significant risk of fluvial flooding. A range of locations are proposed to provide a reasonable level of choice for people and the development industry. While Long Stratton is not as well related to employment or high quality public transport this is outweighed by the availability of a good range of local jobs, services and other community facilities and the significant local benefits of a development-led bypass. To ameliorate the impact of more limited opportunities for non-car trips to strategic employment locations and other facilities in Norwich, it will be particularly important to take a ‘whole settlement’ approach to the development of Long Stratton to maximise the number of local trips on foot or by cycle.

6.15 The major urban extension in the Old Catton, Sprowston, Rackheath, and Thorpe St Andrew growth triangle will provide a concentration of growth which can support local services, facilities, and infrastructure including secondary education, high quality public transport links and significant green infrastructure. An Area Action Plan and a sustainable development code are being developed. The growth triangle is proposed to accommodate 10,000 dwellings after 2026. A large part of the development at Rackheath was promoted as an eco-community under the previous Government’s eco-towns programme. The Rackheath low carbon development remains part of this strategy.
6.16 In South Norfolk the urban edge is partly defined by the Yare valley, and the A47 provides an additional barrier. This makes a similar large-scale urban extension inappropriate. The strategy recognises this as well as the presence of the large freestanding market town of Wymondham and allocates moderate growth at a cluster of separate locations. This offers a reasonable degree of locational choice for new development in locations with access to public transport routes which currently perform well, or which are prioritised for improvement, and to a range of strategic employment locations.

6.17 The Joint Core Strategy also promotes development at Long Stratton to achieve local benefits, and improve the link between two regional centres of Norwich and Ipswich, through the provision of a bypass. In 2009 a County Council promoted bypass had the benefit of planning permission.

Key dependencies

6.18 There must be a clear commitment to fund and implement key infrastructure as identified in the policy before land is released for major growth.

6.19 To implement the JCS significant highway improvements are required at the Longwater (A1074), Thickthorn (A11) and Harford (A140) junctions on the A47 Norwich Southern Bypass. Completion of the Northern Distributor Road is fundamental to the full implementation of this Joint Core Strategy. In particular it is necessary to allow significant development in the growth triangle and the full implementation of the remainder of the Norwich Area Transportation Strategy. The completion of appropriate improvements at Postwick junction would allow for some development in the Old Catton, Sprowston, Thorpe St Andrew growth triangle in advance of the NDR (see supporting text for Policy 20). Completion of a bypass is a pre-requisite for the scale of growth identified in Long Stratton.

6.20 Capacity improvements to the A11/A47 Thickthorn junction are likely to require expansion of the existing Park and Ride site with improved access from the A11 northbound. Growth at Wymondham, Hethersett and Cringleford is dependent on significant enhancement to public transport infrastructure which will include Bus Rapid Transit if a viable route can be implemented. Growth at Easton/Costessey is dependent on implementing Bus Rapid Transit on the Dereham Road. The growth in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew area will require the implementation of bus priority routes into the city centre including a Bus Rapid Transit route which may be via Gurney Road/Salhouse Road. Growth at Long Stratton requires improvements to public transport including bus priority improvements on the approach to the A140/A47 Harford junction with further bus priority on the A140 corridor to the city centre.

6.21 There will need to be area-wide improvements to the walking and cycling networks and more localised road and bus priority improvements, but these will depend on the form of development in the growth areas and the continued work on the Norwich Area Transportation Strategy.

6.22 A new secondary school is needed to serve the new community in the north east. The form and location of secondary provision for growth in the west and south west is more complex and yet to be determined. Secondary schools at Costessey, Hethersett and Wymondham are all on constrained sites and on-site expansion is difficult. Solutions will need to ensure that children have the opportunity to attend school local to where they live.
The preferred approach may require the relocation of all three schools to facilitate expansion. New primary schools and pre-school provision will be required for all the growth locations.

6.23 Utilities such as water and electricity are critical and development cannot take place without them. Key requirements include environmental improvements at Whittingham and other sewage treatment works. There are different delivery mechanisms for these and the Joint Core Strategy will influence the utility providers’ strategies and investment plans. A wide range of services and infrastructure is needed to create a balanced community. These are not all listed above. Timing for delivery will be a matter for the masterplanning process and ongoing management by the GNDP.

6.24 Provision of significant levels of local green infrastructure is essential to ensure the long-term sustainability of the proposed development areas. It must also be sufficient in scale and type to ensure that there are no potential impacts on nearby sites of international biodiversity importance.

6.25 The policy provides for new communities and a wide range of development. Consequently the provision of new services and infrastructure will also have wider benefits for existing communities. The policy aims in this respect do not require developers to directly fund existing deficiencies.

References
06 Policies for places, Policy 10
- Planning Policy Statement 1 (PPS1) Delivering Sustainable Development
- Planning Policy Statement: Eco-towns - A supplement to Planning Policy Statement 1
- Planning Policy Statement 3 (PPS3) Housing
- Planning Policy Statement 5 (PPS5) Planning for the Historic Environment
- East of England Plan Policy SS1, SS5, SS8 and NR1
- Norwich Area Transportation Strategy
- Greater Norwich Development Partnership Green Infrastructure Study (2007)
- Appropriate Assessment of the Joint Core Strategy for Broadland, Norwich and South Norfolk
- Greater Norwich Integrated Water Cycle Study Stage 2b (2009)
- Historic Characterisation and Sensitivity Assessment (2009)
- Broadland and South Norfolk Landscape Character Assessments
- Greater Norwich Infrastructure Needs and Funding Study (2009)
Green infrastructure priority areas supporting key growth locations

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South Norfolk District Council – 100019483
September 2009

Key
- Priority areas for Green Infrastructure
  - A Norwich to The Broads
  - B Wymondham to Norwich
  - C Water City
  - D Five Rivers
  - E Long Stratton to Norwich
- Norwich urban area – additional opportunities for smaller scale Green Infrastructure throughout
- Growth locations
- Main towns and key service centres

Note: Other Green Infrastructure opportunities promoted throughout the Joint Core Strategy area.
Policy 11: Norwich City Centre

The regional centre role will be enhanced through an integrated approach to economic, social, physical and cultural regeneration to enable greater use of the city centre, including redevelopment of brownfield sites. It will be the main focus in the sub-region for retail, leisure and office development. Housing and educational development will also reinforce the vibrancy of the city centre. Its role will be promoted by:

- enhancing the historic city, including its built, archaeological and environmental assets and its distinctive character as identified in Conservation Area appraisals, through innovative, sustainable design
- strengthening the city’s role as a cultural centre and visitor destination of international importance, with additional tourist facilities, including promotion of conference and concert facilities
- expanding the use of the city centre to all, in particular the early evening economy and extending leisure and hospitality uses across the city centre, with late night activities focussed in identified areas
- enhancing its retail function, providing for a substantial expansion of comparison retail floorspace of varied types and size of unit to provide a range of premises. This will be achieved through intensification of uses in the primary retail area and if necessary through its expansion; other shopping areas within the centre will be strengthened to provide for retail diversity, with a particular focus on enhancing the character of specialist retailing areas and markets
- expanding its function as an employment centre, including provision of high quality office premises and a diversity of uses across the area, including media, creative, financial, business and professional services and information communication industries

Housing development densities will generally be high, but family housing will also be provided to achieve a social mix. Housing will be provided as part of mixed use developments wherever possible.

To support these roles, improvements will be made to:

- the public realm
- open spaces, green linkages and connections between open spaces, linking to the river corridor and the open countryside
- walking and cycling provision
- sustainable transport access to and within the city centre in accordance with the Norwich Area Transportation Strategy, in particular to strengthen its role as a gateway and hub of an enhanced public transport system

Areas of the city centre will be comprehensively regenerated:

- the Northern City Centre will be developed in accordance with its Area Action Plan to achieve physical and social regeneration, facilitate public transport corridor enhancements, and utilise significant redevelopment opportunities
- the St Stephens area will be developed for mixed uses in accordance with its masterplan, to promote retailing, offices and housing and to create an improved pedestrian environment
- the Rose Lane area will be a major focus for commercial development
6.26 Norwich is a regional centre and Regional Transport Node. The city centre is the most sustainable location for major retail, leisure, office, culture and tourism related development in line with regional policy. Concentration of such development will boost agglomeration benefits. Evidence shows that the city centre will need to accommodate at least 100,000m² of new offices up to 2026. Retail need is difficult to predict over long periods but research in 2007 indicated capacity for very significant growth in comparison goods floorspace with more modest need for convenience goods. The latter will principally be delivered through a major new food store at Anglia Square. Given the uncertainties around long term forecasting and the unpredictable impact of the 2009 recession a relatively cautious approach will be taken to comparison goods floorspace growth. Consequently, opportunities will be sought for around 20,000m² net of comparison goods floorspace to 2016. Retail need will be subject to regular monitoring and refreshed analysis to ascertain whether further new floorspace is required for the later JCS period. Brazengate and Riverside shopping areas, formerly designated as part of the Primary Retail Area, are redesignated under this strategy. Both areas are “other shopping areas” on the city centre key diagram. Brazengate, an edge of centre retail area in the south of the city centre serving the convenience goods needs of southern Norwich, is defined as a secondary part of the city centre. Riverside, part of an out of centre mixed use leisure, housing and retail area with both convenience and large scale comparison good outlets, is defined in policy 19 as a Large District Centre. These designations are reflected by changes to the Norwich City Proposals Map. Both areas remain high in the retail hierarchy, and some further retail development may be appropriate. The purpose of these redesignations is to ensure that the majority of future comparison goods retailing development need is met within or on the edge of the Primary Retail Area. This will ensure that the sustainably accessible core retail area of the city centre remains a vital and vibrant area, a key element of the local economy and one of the top ten retail centres in the country. The St Stephens masterplan will identify the appropriate scale of retail development for the area, through intensification or expansion of the primary retail area, mainly for comparison goods retailing.

6.27 Research has also identified that a substantial amount of space is required for other service related uses, such as leisure and tourism. The Retail and Town Centres Study suggests that new cafe, restaurant and bar development should be at least 15% over and above comparison goods floorspace. Consequently at least 3,000m² should be provided by 2016.

6.28 Ideopolis evidence demonstrates that investment in cultural assets benefits residents, workers and visitors adding quality of life and acts as a key factor in attracting and retaining highly skilled workers. The Conference Centre Feasibility Study (2009) concluded that there is not a market for major new conference and concert facilities in the sub-region. However, it identified that there is the potential to provide a new medium-scale conference and concert facility, either by conversion or new build in the city centre.

6.29 Housing growth is required to meet need and to further promote a vital and vibrant city centre community. Taking account of committed development and new allocations, a minimum of 2,750 dwellings will be provided in the city centre between 2008 and 2026.

6.30 An Area Action Plan for the Northern City Centre is expected to be adopted prior to the adoption of this JCS. A masterplan is under development for the St Stephens area.
will inform the site allocation plan for Norwich and will be adopted as a Supplementary Planning Document. Redevelopment of the Rose Lane area will also be guided by a Supplementary Planning Document.

6.31 Parts of the city centre are within zone 2 flood risk areas and more detailed studies will be undertaken to support site specific DPDs.

References
06 Policies for places, Policy 11
- East of England Plan Policy NR1
- Planning Policy Statement 5 (PPS5) Planning for the Historic Environment
- Planning Policy Statement 4 (PPS4) Planning for Sustainable Economic Growth
- Feasibility Study for a Conference Centre and Concert Hall for the Greater Norwich Area (2009)
- Norwich Sub Region: Retail and Town Centres Study (2007)
- Employment Growth and Sites and Premises Study (2008)
- Strategic Flood Risk Assessment
- Ideopolis: Knowledge City Regions (2006)
- Norwich City Council Annual Monitoring Reports
- Strategic Housing Land Availability Assessment
- Northern City Centre Area Action Plan
- St Stephens Area Masterplan
- Norwich Area Transportation Strategy
Norwich City Centre key diagram

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Key

- City Centre
- Northern City Centre developed as Area Action Plan
- St Stephens Area developed through masterplan
- Main Leisure Areas
- Late Night Leisure Area
- Enhanced retail function, Expansion of Primary Retail Area
- Specialist shopping areas
- Other shopping areas
- Enhanced principal Green Links
- Improved Public Realm

Areas of change. Mixed use development sites with improved public realm.

- Main focus of change - residential
- Main focus of change - commercial
- Main focus of change - retail

NB. Range of transport initiatives promoted in the City Centre
Policy 12: The remainder of the Norwich urban area, including the fringe parishes

The existing Norwich urban area includes the built-up parts of the urban fringe parishes of Colney, Costessey, Cringleford, Trowse, Thorpe St Andrew, Sprowston, Old Catton, Hellesdon, Drayton and Taverham. It will be expanded through significant growth in the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, and smaller urban extensions at Cringleford, and Easton/Costessey (Policy 10).

Throughout the suburban area and fringe parishes opportunities will be sought:
- to identify land to contribute towards the smaller sites allowance set out in Policy 9
- to identify and regenerate tired suburbs and promote neighbourhood-based renewal
- to improve townscape and retain the best of local character
- to improve the gateways to Norwich by seeking co-ordinated environmental and townscape improvements on all major routes from the urban edge to the city centre
- for small-scale and medium-scale developments to increase densities, where a design and access statement demonstrates that an improvement to townscape will result, and particularly around district centres and on public transport routes
- to retain and improve local jobs, including through the retention of existing employment allocations and identified sites and by ensuring that small-scale opportunities are genuinely available to all levels of the market
- to retain and improve local services, and protect and enhance local and district centres

Green infrastructure and links between currently fragmented habitats and to the rural fringe will be protected, maintained and enhanced. This will include:
- the protection of the landscape setting of the urban area
- the re-establishment of heathland habitats in the north and north east to link through to Mousehold
- the completion of riverside and river valley walks extending out into the surrounding countryside
- a new water-based country park at Bawburgh/Colney and improved links from the city centre and areas north of the River Yare to the existing country park at Whitlingham
- the establishment of a comprehensive cycle and walking network
- tree planting to enhance amenity and habitat, and to ameliorate the impact of the ‘urban heat island’ effect

Construction of the Northern Distributor Road (NDR) will reduce the impact of traffic on residential areas and allow significant enhancement of public transport, cycling and walking through:
- adoption of a hierarchy of routes as set out in Norwich Area Transportation Strategy
- establishment of homezones where appropriate
- area-wide traffic restraint, including restrictions on through traffic and reduced speeds
- development of comprehensive walking and cycling links
- implementation of a Bus Rapid Transit network on selected routes linking the city centre and railway station to the strategic employment and growth locations
- improvements to infrastructure on other key routes of the public transport network

Norwich will be promoted as a ‘learning city’ and the expansion of existing further and higher education opportunities will be encouraged.
The following areas are identified as priorities for regeneration requiring area-wide co-ordination and community based approaches that will be taken forward through local development documents:

- Northern wedge (North city centre to Mile Cross and New Catton) – physical and social regeneration
- Western Norwich – emphasis on social regeneration
- East Norwich (city centre to Deal Ground/ Utilities) – major physical regeneration opportunities for mixed use development and enhanced green linkages from the city centre to the Broads

*Contributes to spatial planning objectives 1, 2, 3, 4, 5, 6, 7, 8 and 9*

6.32 The existing suburbs and immediate urban/ rural fringe are key to the successful development of the area. They are home to a significant number of people, businesses and environmental assets, and provide the links between the city centre and the surrounding area. There are a range of opportunities for redevelopment, regeneration and enhancement. The range of issues warrants a comprehensive and dedicated approach in this strategy. The area contains a considerable and diverse employment base including a number of employment locations of particular importance for industrial uses (B2 and B8). This role will be maintained.

**References**

06 Policies for places, Policy 12

- East of England Plan Policy SS1, SS5, SS8 and NR1
- Norwich Area Transportation Strategy
- Greater Norwich Development Partnership Green Infrastructure Study (2007)
- The English Indices of Deprivation 2007
- Appropriate Assessment of the Joint Core Strategy for Broadland, Norwich and South Norfolk
### Policy 13: Main Towns

Subject to resolution of servicing constraints, these towns will accommodate additional housing (numbers indicate a minimum number of dwellings), town centre uses, employment and services:

<table>
<thead>
<tr>
<th>Town</th>
<th>Housing Allocations</th>
<th>Town centre uses</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aylsham</td>
<td>300 dwellings</td>
<td>Limited expansion in or adjacent to the town centre</td>
<td>Expansion based on existing employment areas</td>
</tr>
<tr>
<td></td>
<td>(subject to overcoming existing sewage disposal constraints)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diss</td>
<td>300 dwellings</td>
<td>Significant expansion in or adjacent to the town centre</td>
<td>Employment growth to meet the needs of town and large rural catchment</td>
</tr>
<tr>
<td>Harleston</td>
<td>200-300 dwellings</td>
<td>Limited expansion in or adjacent to the town centre</td>
<td>Expansion based on existing employment areas</td>
</tr>
<tr>
<td>Wymondham</td>
<td>See Policy 10</td>
<td>See centre</td>
<td></td>
</tr>
</tbody>
</table>

*Contributes to spatial planning objectives 1, 2, 3, 6, 7, 8 and 9*

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6.33 The four Main Towns in the area are Aylsham, Diss, Harleston and Wymondham.

6.34 Aylsham, Diss and Harleston are located on rivers that flow directly into the Broads and development must ensure that there is no significant detrimental effect on the Broadland SPA, Broadland Ramsar and Broads SAC.

6.35 Aylsham has the fourth highest level of shops and services outside Norwich, available employment land and spare capacity at all of its schools. As a Main Town it would be expected to accommodate new housing. However, environmental constraints concerning sewage disposal need to be overcome. The allocation for additional housing is dependent on resolution of this constraint, although small-scale infill development within the existing town will still be acceptable.

6.36 Jobs growth will be encouraged in line with the needs of the town and its catchment and will include allocations to ensure the availability of around 5 hectares of employment land. The town also has the potential for limited new shopping floor space up to 2016, which will require the suitable expansion of the town centre. The recent supermarket on Norwich Road can accommodate forecast need for convenience shopping. Quality of life will be enhanced by community measures to further the town’s ‘Cittaslow’ status.

6.37 Bus services on the Cromer/Sheringham to Norwich route are relatively frequent. Journey times and reliability will benefit from proposed enhanced infrastructure on the A140 corridor from Norwich International Airport to the city centre.
6.38 Diss is an attractive market town with the largest number of shops and services outside Norwich. It serves a large rural catchment covering parts of South Norfolk and northern Suffolk and has the development potential for significant new shopping floor space which will be accommodated on the existing retail allocation adjacent to the town centre. Smaller scale opportunities will be sought to strengthen the town centres non-food and leisure offer.

6.39 With an attractive historical town centre that includes parkland and a notable lake, plus sizeable employment areas well located next to the railway station and good bus and rail links to Norwich, London and surrounding towns, Diss could sustain further development of about 300 dwellings up to 2026. The town centre will be enhanced by the implementation of an Area Action Plan to encourage the mixed use redevelopment of brownfield land along Park Road, while the town’s general quality of life will be enhanced by the encouragement of community measures to further its ‘Cittaslow’ status. Job growth will be encouraged to serve the needs of this growth and the town’s catchment. Employment allocations will be made to provide a total of around 15ha of available land.

6.40 New school places and a new water supply will need to be provided for this level of housing growth.

6.41 Harleston has a good range of speciality shops and services serving a relatively local catchment. The moderate potential for new shopping floor space by 2016 might be accommodated through modernisation and extension of existing premises but small allocations will also be considered. The town’s shops and expanding industrial estate provide for a range of job opportunities which will be encouraged to develop to support new housing. Harleston has spare capacity in local schools. Local leisure facilities will require improvement. New allocations will be made to accommodate about 200-300 dwellings up to 2026.

6.42 A new water supply will be needed to provide for this level of housing growth.

6.43 Wymondham is located on the strategically important A11 corridor, is close to Norwich and has good bus and rail links. It is the largest market town in the area with an attractive historic centre enhanced by the abbey. It loses retail trade to Norwich due to its relatively close proximity. The town centre will be enhanced by moderate expansion of shopping floor space for both convenience and comparison shopping. The town has local job opportunities on several large employment areas, is reasonably well located to the strategically important employment site at Hethel and has a good provision of accessible shops and services. Employment opportunities will be expanded and links to Hethel enhanced. Allocations will be made in the town to ensure the availability of around 20ha of employment land.

6.44 Public transport will benefit from significantly enhanced bus services to Norwich.

References
06 Policies for places, Policy 13
- Planning Policy Statement 3 (PPS3) Housing
- Planning Policy Statement 4 (PPS4) Planning for Sustainable Economic Growth
- Planning Policy Statement 7 (PPS7) Sustainable development in rural areas
- East of England Plan Policies SS4
- Norwich Sub-region Retail and Town Centres Study (2007)
- Employment Growth and Sites and Premises Study (2008)
- Norfolk County Council: Employment Land Monitor (and historic take up rates)
- Greater Norwich Integrated Water Cycle Study Stage 2b (2009)
- Greater Norwich Development Partnership Green Infrastructure Study (2007)
Policy 14: Key Service Centres

Land will be allocated for residential development of the scale indicated below (and subject to detailed assessment including impact on form and character and the resolution of any specific servicing constraints). Established retail and service areas will be protected and enhanced where appropriate, and local employment opportunities will be promoted. Future development plan documents will consider the adequacy of employment land provision.

Acle: 100 to 200 dwellings
Blofield*: approximately 50 dwellings
Brundall*: approximately 50 dwellings
Hethersett*: at least 1,000 dwellings
Hingham: approximately 100 dwellings
Loddon/Chedgrave: 100 to 200 dwellings
Long Stratton*: at least 1,800 dwellings
Poringland/Framingham Earl*: 100 to 200 dwellings
Reepham: 100 to 200 dwellings
Wroxham: 100 to 200 dwellings

Settlements identified in this policy that are also within the Norwich Policy Area (marked *) may be considered for additional development, if necessary, to help deliver the ‘smaller sites in the NPA’ allowance (see Policy 9).

Contributes to spatial planning objectives 1, 2, 3, 6, 7, 8 and 9

6.45 Ten settlements, defined as Key Service Centres (KSCs), have a range of facilities enabling them to meet local needs as well as the needs of residents of surrounding areas. Typically these are a primary school, a secondary school either within the settlement or easily accessible by public transport, a range of shops and services (including convenience shopping, but more limited in scope than those in the Main Towns), a village hall, primary health care, and a library. They also have public transport services for non journey to work and leisure purposes. The KSCs with more limited services and lacking a secondary school have the lowest housing allocations, i.e. Blofield, Brundall and Hingham.

6.46 Where a range is specified, the scale of new development is expected to be within the range. In exceptional circumstances, a range would be exceeded where it can clearly be demonstrated that the resulting development would respect the form and character of the settlement and bring sustainability benefits for the existing population as well as providing for new residents. This might, for example, be through improved local facilities, or connections to them, or through meeting other defined local needs.

6.47 Acle, Blofield, Brundall, Loddon/Chedgrave, and Wroxham are close to the Broads and development must ensure there is no detrimental impact, including no significant detrimental effect on the Broadland SPA, Broadland Ramsar and Broads SAC.

6.48 Key Service Centres in the NPA may also be considered for additional allocations if it should prove necessary to meet the total housing provision target, having regard to sites
which can be made available in higher order settlements as set out in the settlement hierarchy.

6.49 Acle has a secondary school, and a small range of shops and services serving everyday needs. It has good bus and rail links, is an access point to the Broads and can provide for limited job growth. Infrastructure and environmental constraints, including high quality agricultural land, flood risk, impact on the Broads and sewage disposal, limit its potential to accommodate new housing development. Improvements to sewage treatment works may require phasing. An allocation of between 100-200 dwellings is proposed.

6.50 Blofield is a large village with a reasonable range of facilities, but limited shopping and employment. It is surrounded by high quality agricultural land. Secondary education is provided at Thorpe St Andrew. There are more sustainable options for accommodating new housing developments in the Norwich Policy Area; consequently only modest housing allocation of approximately 50 dwellings is proposed. Blofield Heath is a separate Service Village to the north with its own limited range of facilities.

6.51 Brundall has a limited range of dispersed shops and services and is a major centre for boatyards. It has grown as a consequence of its proximity to Norwich, but has a limited provision of recreational facilities that needs to be rectified. Brundall is surrounded by high quality agricultural land. Secondary education is provided at Thorpe St Andrew. It is important to prevent coalescence with the neighbouring large village of Blofield. Although Brundall has two railway stations and relatively frequent bus services to Norwich, there are more sustainable options for accommodating new housing developments in the Norwich Policy Area; consequently modest housing allocation of about 50 dwellings is proposed.

6.52 Hethersett has a secondary school and a good range of services serving everyday needs, although shopping is limited. It has good bus links to Norwich and Wymondham, is well located for Norwich Research Park but has limited local employment provision. A strategic level of housing growth of 1,000 dwellings is proposed. While an expansion of local services will be encouraged, it is expected that Hethersett will continue to function as a Key Service Centre. Bus services will be significantly improved.

6.53 Hingham is one of the smaller rural centres with a range of basic shops and services serving everyday needs in an attractive and historic centre located around a large green. There is a local employment area, although this is now fully committed. In view of Hingham’s small size, relatively limited range of local shops and services, limited bus services and the need to overcome high school capacity constraints (at Attleborough), a growth of approximately 100 dwellings is proposed. This will be supported by the encouragement of additional local jobs including consideration of the need to extend the industrial estate.

6.54 Loddon has an attractive historic centre providing a range of shops and services with bus links to Norwich and nearby towns. The adjoining village of Chedgrave shares those shops and services in addition to having its own. A range of local job opportunities will be encouraged in line with the needs of housing growth. New development of 100-200 dwellings is proposed to 2026, which may require the small scale expansion of all local schools. Environmental constraints and areas at risk of flood will be significant factors at the site specific stage.
6.55 Long Stratton has by far the best range of local shops, services and employment opportunities of the area’s Key Service Centres. It also benefits from reasonable bus links to Norwich. Significant development is proposed (including a bypass to deliver local environmental improvements by removing through-traffic), of at least 1,800 new homes plus supporting community and commercial development, expanded employment opportunities and enhanced public transport. Growth will fund the bypass. Stimulated by growth, commercial development may be sufficiently strong to begin to move the village towards Main Town status. The precise scale of commercial development, in particular for retailing, will be determined through site specific DPDs.

6.56 Journey times and reliability of bus services will be improved through infrastructure investment from the approach to Norwich Southern Bypass to the city centre.

6.57 Poringland has a secondary school (in the settlement although located in the adjoining parish of Framingham Earl) and a dispersed provision of local shops and services. As of 2008, it has significant housing commitments not built, therefore an allocation of only 100 to 200 is proposed in this Joint Core Strategy. It also has limited local job opportunities, so a new local employment area is proposed. New development will have to take particular account of surface water flood issues.

6.58 Reepham has a secondary school, a range of shops and services, local job opportunities and available employment land. However, its schools are both virtually at capacity, bus services are limited and the sewage treatment works also restricts development potential and may require phasing. 100-200 new homes are proposed to 2026, with the encouragement of appropriate local job growth. This will require measures to improve local school capacities.

6.59 Wroxham forms a gateway to the Broads and is adjacent to the larger service centre of Hoveton, across the River Bure in North Norfolk District. Together Wroxham and Hoveton have significant local employment and services including a secondary school. They have rail access and form a major centre for Broads tourism. The bridge over the Bure is a significant constraint to internal circulation between Wroxham and Hoveton and there is some flood risk in the central area. There is also concern about air quality issues in the centre of Hoveton. Wroxham could support the development of some 100 to 200 dwellings by 2026. This is within utilities capacity limitations taking into account the proposed new housing allocations for some 150 dwellings in North Norfolk District Council’s Local Development Framework. Investment may be needed to improve effluent quality, and development must provide improved community facilities.

References
06 Policies for places, Policy 14
- Planning Policy Statement 3 (PPS3) Housing
- Planning Policy Statement 7 (PPS7) Sustainable Development in rural areas
- East of England Plan Policies SS4
- Greater Norwich Integrated Water Cycle Study Stage 2b (2009)
- Strategic Flood Risk Assessment
- Appropriate Assessment of the Joint Core Strategy for Broadland, Norwich and South Norfolk
Policy 15: Service Villages

In each Service Village land will be allocated for small-scale housing development subject to form and character considerations. Small-scale employment or service development appropriate to the scale and needs of the village and its immediate surroundings will be encouraged. Existing local shops and services will be protected.


In addition to the settlements above, Easton and Rackheath have equivalent status to a Service Village while providing a location for significant housing growth.

Settlements identified in this policy that are also within the Norwich Policy Area (marked *) may be considered for additional development, if necessary, to help deliver the 'smaller sites in the NPA' allowance (see Policy 9).

N.B This policy will necessitate a number of changes to the adopted proposals maps for South Norfolk. New settlement limits will be needed for Alburgh, Bergh Apton, Bramerton and Carleton Rode. These will be defined through the preparation of the South Norfolk Site Specific Proposals Development Plan Document.

Contributes to spatial planning objectives 2, 3, 6, 7, 8 and 9

6.60 Service Villages are defined based on having a good level of services/facilities. The services considered to be the most important, but in no particular order, are:

- primary school
- food shop
- journey to work public transport service (to Norwich, a Main Town, Key Service Centre, or a comparable centre outside the plan area)
- village hall

Most of the Service Villages have 3 or all 4 of these available within the identified settlement along with a range of other services. In some cases key services exist in other nearby settlements to which there is good potential access particularly by foot, cycle or public transport. The service role will be improved by encouraging local employment, services and facilities development.
6.61 Allocations in the Service Villages will provide small-scale housing growth to meet a range of local needs including affordable housing. It is envisaged that allocations will be within the range of 10-20 dwellings in each Service Village. Detailed analysis of form, character and servicing constraints may result in smaller allocations in some villages. Alternatively 20 dwellings may be exceeded where a specific site is identified which can clearly be demonstrated to improve local service provision (or help maintain services under threat) and sustainability, and where it is compatible with the overall strategy. Additional development may also take place on suitable exception, infill and windfall sites. Further allocations may be considered in Service Villages in the NPA if it should prove necessary to meet the total housing provision target, having regard to sites which can be made available in higher order settlements as set out in the settlement hierarchy.

6.62 At 10-20 dwellings per village, total allocations in Service Villages outside the NPA could provide for 430 to 860 dwellings.

References
06 Policies for places, Policy 15
• Planning Policy Statement 7 (PPS7) Sustainable Development in rural areas
Policy 16: Other Villages

The Other Villages identified below will have defined development boundaries to accommodate infill or small groups of dwellings and small-scale business or services, subject to form and character considerations.

Aldeby, Bawburgh*, Bressingham, Brockdish, Burgh St Peter (including part within Wheatacre parish and the adjacent developed area in Aldeby parish), Burston, Caistor St Edmund*, Cantley, Claxton, Colton*, Denton, Flordon*, Forncett St Peter, Forncett St Mary, Frettenham, Great Melton*, Haddiscoe, Hainford, Hardwick, Hedenham, Hevingham, Keswick*, Ketteringham*, Langley Street, Marlingford*, Marsham, Morley, Needham, Shelfanger, Shotesham, Starston, Strumpshaw, Swainsthorpe*, Tibenham, Tivetshall St Margaret, Tivetshall St Mary, Toft Monks, Topcroft Street, Winfarthing.

Settlements identified in this policy that are also within the Norwich Policy Area (marked *) may be considered for additional development, if necessary, to help deliver the ‘smaller sites in the NPA’ allowance (see Policy 9).

N.B this policy will necessitate a number of changes to the adopted proposals maps for Broadland and South Norfolk. New settlement limits will be needed for Aldeby, Burgh St Peter, Caistor St Edmund, Claxton, Colton, Denton, Flordon, Forncett St Mary, Great Melton, Hardwick, Hedenham, Keswick, Ketteringham, Langley Street, Marlingford, Shotesham, Starston, Swainsthorpe, Tibenham, Tivetshall St Margaret, Tivetshall St Mary, Toft Monks, and Topcroft Street.

These will be defined through the preparation of the South Norfolk Site Specific Proposals Development Plan Document.

A limited number of existing settlement limits shown on the adopted proposals maps for Broadland and South Norfolk will be deleted. This applies to Felthorpe, Honingham, Upton, Ranworth, Wacton, Weston Longville and Woodbastwick. The policy change making this necessary will take effect on adoption of the Joint Core Strategy.

Contributes to spatial planning objectives 2, 3, 6, 7, 8, and 9

6.63 The area contains a large number of villages that have few or no local services, and would not provide a sustainable location for significant new development. Such places are very reliant on the services of larger centres for their everyday needs, and new development would not necessarily help to retain or attract services due to the ever increasing population thresholds required to support them. While significant expansion would be unsustainable, and no allocations are proposed, some of those places with basic essential services would be capable of accommodating very limited windfall infill development without affecting the form and character of the villages. Housing to provide for local needs may also be suitable.

6.64 The Other Villages have been defined based on having a basic level of services/ facilities. This is generally a primary school and village hall, though regard will be had to the presence of a range of other services. These will normally be available within the identified
settlement, though regard will also be had to their availability in other nearby settlements where there is good access particularly by foot or cycle.

6.65 In exceptional circumstances, a larger scale of development may be permitted where it would bring local facilities up to the level of those in a Service Village, and is acceptable having regard to other policies in this Joint Core Strategy, or a relevant subordinate Development Plan Document.

**References**

*06 Policies for places, Policy 16*

- Planning Policy Statement 7 (PPS7) Sustainable Development in rural areas
Policy 17: Smaller rural communities and the countryside

In the countryside (including villages not identified in one of the above categories), affordable housing for which a specific local need can be shown will be permitted in locations adjacent to villages as an exception to general policy. Farm diversification, home working, small-scale and medium-scale commercial enterprises where a rural location can be justified, including limited leisure and tourism facilities to maintain and enhance the rural economy will also be acceptable. Other development, including the appropriate replacement of existing buildings, will be permitted in the countryside where it can clearly be demonstrated to further the objectives of this Joint Core Strategy.

Contributes to spatial planning objectives 2, 3, 6, 7, 8 and 9

6.66 Much of the area is agricultural land forming an attractive backdrop to the existing settlements and the Broads. This area contains many attractive built and natural features including areas of notable landscape character, geological and biodiversity interest. These need to be protected and enhanced, while providing for the rural economy and accessibility to services to be maintained and enhanced.

6.67 The policy sets out the types of uses that may be acceptable in the countryside. In the case of more significant proposals, these will be considered in the light of their contribution to meeting the overall objectives of the JCS.

References
06 Policies for places, Policy 17
- Planning Policy Statement 7 (PPS7) Sustainable Development in rural areas
**Policy 18: The Broads**

In areas in close proximity to the Broads Authority area particular regard will be applied to maintaining and enhancing the economy, environment, tranquillity, setting, visual amenity, recreational value and navigational use of the Broads.

Opportunities will be taken to make better use of the benefits of the Broads, and to support its protection and enhancement while ensuring no detrimental impact on the Broadland SPA, Broadland Ramsar and Broads SAC.

*Contributes to spatial planning objectives 1, 8 and 9*

6.68 The Broads is an area of acknowledged national importance for landscape, biodiversity, and recreational and navigational value. It is a major contributor to the economy and quality of life of the Joint Core Strategy area and wider region. The Broads Authority area is outside the area of the JCS but has tight boundaries. Towns, villages, businesses and countryside associated with the Broads are often wholly or partly within the JCS area. The Broads also extends into the Norwich urban area. Development within the Joint Core Strategy area has the potential to strengthen, complement and link with Broads assets, but also risks harming or under-valuing them if the inter-relationship of the two areas is not properly recognised. Consequently, appropriate opportunities will be taken to improve linkages, such as through green infrastructure networks and access for local communities. Harmful impacts will be avoided, for example through the provision of informal open space and attractions that complement the attractions of the Broads area and prevent excess visitor pressure.

*References*

*06 Policies for places, Policy 18*
- Broads Authority Local Development Framework
The development of new retailing, services, offices and other town centre uses as defined by government guidance will be encouraged at a scale appropriate to the form and functions of the following hierarchy of defined centres:

1. Norwich City Centre
2. The town and large district centres of: Aylsham, Diss, Harleston and Wymondham, and within the Norwich urban area, at Anglia Square/Magdalen Street and Riverside
3. The large village and district centres of: Acle, Coltishall, Hethersett, Hingham, Loddon, Long Stratton, Poringland and Reepham, and within the Norwich urban area at Aylsham Road, Drayton Road, Bowthorpe, Dereham Road, Eaton Centre, Earlham House, Larkman centre, Plumstead Road, Old Catton and Dussindale (Thorpe St Andrew). New district centres/high streets to be established within the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle at Blue Boar Lane, Sprowston and Hall Road, Norwich. The Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle will be served by a district centre. This may be provided by building on the proposed district centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Triangle as determined through the Area Action Plan for the Growth Triangle.
4. Local centres, including new and enhanced local centres serving major growth locations in the Norwich Policy Area

Policies will be introduced in DPDs for all categories of centre as well as more dispersed services in villages to enhance the environment and economy of the centre or village and to protect its function by controlling proposals which would result in the loss of commercial premises or local services.

Contributes to spatial planning objectives 1, 2, 4, 6 and 7

6.69 Government policy promotes vital and viable town centres to provide a range of easily accessible shops and services in an attractive and safe environment. A positive approach to the development of centres will promote local economic growth, investment in regeneration, social inclusion and widen consumer choice. These centres will be accessible by a range of forms of transport.

6.70 The hierarchy of centres reflects the functions of and catchments served by each centre, the availability of offices, leisure, shops and services and their potential to accommodate growth as assessed by background evidence studies. Categories 1 and 2 respectively group the largest centres of Norwich and the Main Towns (plus large district centres) which serve notable urban and rural catchments and have potential for additional employment, leisure and shopping uses.

6.71 Category 3 shows the smaller district centres within Norwich and the smaller towns and large villages with centres serving more localised catchments and which have a greater emphasis on providing for everyday needs (this category also includes the largest proposed new district centres). Local smaller scale provisions to serve the remaining proposed new housing growth areas are shown in Category 4. Other local shops and services will also be provided for where local needs arise.
6.72 Overall the development of potential town centre uses will be provided for on a scale appropriate to the form and functions of, and the potentials for, development identified by background evidence studies. Co-ordinated development management policies for the three Districts will include consideration of a lower threshold for impact assessments than the national threshold set out in Planning Policy Statement 4.

6.73 The area is dominated by Norwich city centre, which is a strong office, retail and leisure destination and the highest ranked retail centre in the region. There are approximately 1,100 shops covering 229,000m² of floorspace in the city centre (of which most are retail comparison goods) while the area also provides for most of the JCS area’s commercial and leisure provision.

6.74 In terms of the retail hierarchy, Norwich city centre contains a number of retail areas as illustrated on the Norwich city centre key diagram on page 66. The primary retail area is at the highest level in the retail hierarchy, and the large district centres of Anglia Square/Magdalen Street and Riverside are at the second level. Policies towards other and specialist shopping areas, a number of which supplement and support the primary retail area, will be set out in other Development Plan Documents. The large district centres, plus eleven other district centres within the Norwich urban area, meet the daily needs of their local resident populations. The district centres will be considered for additional improvements as shopping destinations. However no potential has been identified for additional out-of-centre retailing. There are also several free-standing large food stores situated around the Norwich fringe and retail warehouse parks at Costessey, Blackberry Court (Sweet Briar Road), and Salhouse Road, Sprowston.

6.75 The surrounding area is served by a network of vibrant market towns. The largest centres are Aylsham, Diss, Harleston and Wymondham. These are traditional market towns which each contain some 100-140 shops and services. They provide for a wide range of food and non-food shopping requirements, plus cultural and tourism facilities, and serve significant rural catchments. They are broadly comparable in size and function with the large district centre of Anglia Square/Magdalen Street in Norwich. The market and other Main Towns will need to maintain their roles and diversify their shops and services. Recent major food store developments have taken up any potential for convenience goods stores in the town centres of Aylsham and Diss, which both have potential for further comparison goods floorspace. The town centres of Harleston and Wymondham have been identified as having potential for additional convenience and comparison goods. These towns will also act as focal points for leisure development such as cafes, bars, restaurants and other food and drink establishments, to enhance the vitality and viability of the centres. The rural area is also served by centres outside the JCS area including the immediately adjacent settlements of Beccles, Bungay and Hoveton.

6.76 A further range of smaller town, village and urban district centres provide for a more limited choice of goods and services with broadly 15-60 premises. These places serve relatively local catchments, and some contain fewer shops and services than might be expected, due to their proximity to Norwich or other large centres just outside the greater Norwich area. No specific retail floorspace potentials have been identified for this range of smaller centres.
6.77 The proposed large-scale housing areas will provide for shops and services to meet local needs where they are not able to benefit from existing centres. The Old Catton, Rackheath, Sprowston and Thorpe St Andrew growth triangle in particular will be sufficiently large to require a district centre. Preferably this will include a food store as an anchor and sufficient leisure and ancillary activities to provide for the attraction of a range of trips. This may be through building on the proposed centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Growth Triangle. This will be determined through the Area Action Plan for the area.

6.78 Smaller local centres provide a valuable service. In some villages limited, but vital, services are not concentrated in recognised centres but still warrant support and protection.

References
06 Policies for places, Policy 19
• Planning Policy Statement 6 (PPS 6) Town Centres
07 Implementation and monitoring

Policy 20 applies to the whole strategy area

**Policy 20: Implementation**

A co-ordinated approach will be taken to the timely provision and ongoing maintenance of infrastructure, services and facilities to support development.

Provision will be achieved through:

- contributions towards strategic infrastructure from all residential and commercial development, made through the introduction of an area-wide Community Infrastructure Levy (CIL) plus appropriate Section 106 contributions for site specific needs. Until such time as a local CIL is introduced all contributions will be made through Section 106 in line with current legislation and national policy, including the pooling of contributions.
- maximising mainstream Government funding sources including the Homes and Communities Agency, Local Transport Plan, Growth Point Funding, Regional Funding Allocation and Community Infrastructure Funding and other new funding streams, including European funding sources
- co-ordination with the investment programmes of other public bodies e.g. National Health Service
- capital investment by utilities companies through their asset management plans to their regulator which identify the capital investment required
- innovative approaches to capital investment based on forecast future revenue
- consideration of other potential funding mechanisms

Local Planning Authorities and the County Council will make use, where necessary, of their legal powers to bring about strategically significant development, including compulsory purchase.

Future maintenance of the infrastructure provided will be achieved either through adoption by a public body with maintenance payments, where appropriate, or other secure arrangements such as the establishment of a local infrastructure management body.

Implementation of this Joint Core Strategy will depend on the co-ordinated activities of a number of agencies. It is essential that necessary infrastructure is provided in a timely manner related to the needs of new development. The precise timing and phasing of infrastructure will be managed through reviews of the delivery programme, but the underlying principles will be to provide attractive, sustainable communities, to avoid placing an undue strain on existing services and to ensure that residents of new developments do not form patterns of behaviour which ultimately threaten the viability of new services.

Infrastructure that is essential to secure sustainable development will include:
- appropriate transport infrastructure including the implementation of NATS and the construction of the NDR and improved public transport
- affordable or supported housing
• social infrastructure, including education, healthcare, police and emergency services, community facilities
• local and renewable energy generation
• water conservation measures
• sustainable drainage systems (SuDS)
• strategic sewers
• open space and green infrastructure, including habitat creation, pedestrian and cycle links, allotments, recreation facilities, parks, trees, hedgerows, woodland and landscaping
• utilities, including waste management/ recycling/composting facilities
• street furniture
• public art

The developers of strategic growth areas will be required to enter into an ongoing commitment to support community development to bring about a genuinely sustainable community including fostering the growth of community and voluntary organisations.

Contributes to spatial planning objectives 2-12

7.1 This Joint Core Strategy has been formulated on the basis of implementing the major growth in housing and employment so that they are coordinated with relevant infrastructure, services and facilities. It is not the intention of this JCS to permit housing growth to outstrip and be developed in advance of supporting employment and a full range of hard and soft infrastructure.

7.2 The delivery vehicle for co-ordination, prioritisation and management, including contributions and funds, is the Greater Norwich Development Partnership (GNDP). The GNDP will develop and manage a delivery programme supporting the implementation of this Joint Core Strategy in partnership with stakeholders. The programme will be implemented through the Local Investment Plan and Programme (LIPP), or any successor delivery plan, and will be regularly updated. The key elements of the programme are set out in the draft Implementation framework in Appendix 7.

7.3 Significant and timely investment will be required to implement the JCS. Developer contributions will be sought through a combination of a Community Infrastructure Levy (CIL) and planning obligations. The CIL will apply to both residential and commercial development. Until a locally derived CIL has been implemented local authorities in the Greater Norwich area will continue to use planning obligations through S106, including pooling when appropriate and in accordance with current practice and legislation.

7.4 The CIL will be set at a level that does not undermine the viability of development. Studies identify that the cost of required infrastructure is likely to exceed expected income from all sources. The GNDP will address the implications of any funding gap for the infrastructure delivery programme, including prioritisation and seeking additional funding from government. It will seek to maximise investment from mainstream public sector funding and explore innovative ways to fund infrastructure investment. Other funding streams might include:
• The New Homes Bonus
• Tax Increment Financing (TIF)
7.5 It is the GNDP’s intention to submit a charging schedule in accordance with the regulations. The GNDP will regularly review the infrastructure needs of this Joint Core Strategy and development values, updating the charging schedule as necessary. Between these reviews, the CIL will be index-linked as set out in the Regulations.

7.6 The GNDP will expect utility providers to ensure that their asset management plans take full account of the infrastructure needed to accommodate the development proposed in this JCS.

Monitor and manage

7.7 The monitoring framework in Appendix 8 includes performance indicators and targets to assess how the Joint Core Strategy’s objectives are being met. Some of these indicators are core output indicators, which the Government require us to collect. The other local indicators have been developed to address matters relevant to this area. Many of the indicators derive from the Sustainability Appraisal.

7.8 Contextual indicators are also used. These illustrate wider objectives such as for health and education. A Local Area Agreement has been established in Norfolk and a set of 35 indicators prioritised reflecting the key local concerns relating to the area’s well being. These indicators are published separately.

7.9 The Greater Norwich Development Partnership will publish an Annual Monitoring Report (AMR). The AMR is a check on the performance of the Joint Core Strategy and gives the opportunity to adjust policies and review objectives and to revise the Local Development Scheme. The outcomes will inform the need for reviews of the LIPP, this JCS and other Local Development Documents.

Review

7.10 The Joint Core Strategy is dependent on significant investment in supporting infrastructure. New development will contribute to this. However, the provision of infrastructure beyond that normally provided as part of the development will need the active co-operation of and investment by other agencies. These include utility companies, health care providers, central and local government, the Highways Agency and rail providers. Every effort will be made to ensure appropriate and timely supporting infrastructure is delivered. In the event of a critical shortfall, the Joint Core Strategy will be reviewed.

Contingency

7.11 The GNDP will be working to bring forward all growth proposals and associated infrastructure as early as possible to maximise delivery and flexibility. This will be facilitated by engagement with developers to understand opportunities, overcome constraints and maximise development potential without compromising quality.

7.12 There is no phasing of growth in the JCS beyond that imposed by the provision of infrastructure and, at the time of adoption, there are not expected to be significant constraints to the provision of most critical elements. However, there remains some uncertainty around the delivery of the Northern Distributor Road (NDR).
7.13 Notwithstanding this, there is a significant housing commitment across the JCS area that is unaffected by infrastructure constraints. Delay to, or non delivery of, the NDR would not prevent the JCS provision of housing and employment development within the Norwich City and South Norfolk areas or the existing housing commitment in Broadland. Market pressures are likely to bring forward development in these locations. The existing commitment and the range and scale of growth proposals across the JCS area provide significant flexibility to bring forward growth in those locations unaffected by infrastructure constraints.

7.14 Without the NDR the housing and employment growth in the Broadland part of the NPA cannot all be delivered, and neither can significant parts of NATS including high-quality public transport in the northern part of the urban area.

7.15 In February 2011 the NDR / Postwick Hub scheme was one of a ‘Development Pool’ of 45 national schemes which are to be scrutinised by the Department for Transport in terms of their business case, value for money and other criteria. A final decision on funding is to be made by the Secretary of State by the end of 2011.

7.16 Pending clarity on Postwick Hub’s and the NDR’s delivery, the table below summarises the current understanding of development potential offered by the strategic locations in the Broadland NPA as at 2013. The delivery of the smaller sites allowance in the Broadland NPA will be dealt with on a site by site basis as the dependence on Postwick junction and the NDR will vary with location.

<table>
<thead>
<tr>
<th>Location</th>
<th>Level of growth supported by current evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Development that can come forward in advance of improvements to Postwick Junction:</strong></td>
<td></td>
</tr>
<tr>
<td>Growth Triangle</td>
<td>1440 committed dwellings in the Sprowston Fringe</td>
</tr>
<tr>
<td>Rackheath</td>
<td>200 dwellings on the proposed exemplar development at Rackheath (in addition to 94 existing consented dwellings)</td>
</tr>
<tr>
<td><strong>Further development that can come forward following improvements to Postwick Junction and in advance of confirmation of delivery of the NDR:</strong></td>
<td></td>
</tr>
<tr>
<td>Growth Triangle</td>
<td>At least 1600 dwellings</td>
</tr>
<tr>
<td>Broadland Business Park</td>
<td>Development of existing allocation and new allocation (approx. 18ha including c50,000m2 B1)</td>
</tr>
<tr>
<td><strong>Development that cannot come forward until confirmation of delivery of the NDR:</strong></td>
<td></td>
</tr>
<tr>
<td>Growth Triangle</td>
<td>All remaining housing in the Growth Triangle and new employment allocation at Rackheath</td>
</tr>
<tr>
<td>Airport Area</td>
<td>New employment allocation</td>
</tr>
</tbody>
</table>
7.17 Broadland District Council is committed to preparing an Area Action Plan (AAP) for the growth triangle. As part of the preparation of this AAP there will be an investigation of any potential that may exist for further growth to take place (in addition to that shown in table 1 above) without confirmation of the delivery of the NDR. This will include testing whether interim schemes and/or alternatives to the NDR could help to facilitate growth without compromising the spatial vision and objectives of the JCS. Therefore, the analysis would need to cover capacity of all infrastructure, not just road capacity, the implications of particular sites, and the nature of the proposed development. It will be essential that the growth is delivered in accordance with the overall strategy, taking account of its wider impact across the Norwich area, including a full range of infrastructure provision, services and high-quality public transport and walking/cycling provision.

7.18 Development beyond the pre-NDR threshold established through the AAP process will not be possible without a commitment to the NDR. If it becomes clear that there is no possibility of the timely construction of the NDR, a review of the JCS proposals for the growth triangle and the implications for the strategy as a whole would be triggered.

References

*07 Implementation and monitoring, Policy 20*
- Norfolk Action; Norfolk Local Area Agreement (2008)
- Planning Policy Statement 12 (PPS12) Local Spatial Planning
- Greater Norwich Infrastructure Needs and Funding Study (2009)

Implementation and delivery within the Broadland part of the Norwich Policy Area

7.19 Following the adoption of the Joint Core Strategy in March 2011 a court judgment remitted parts of the previously adopted plan for further consideration. This judgment remitted specific elements of the proposals within the Broadland part of the Norwich Policy Area and in particular: a) the Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (including employment growth at Rackheath but excluding employment land at Broadland Business Park and the airport); and b) 2000 homes proposed on smaller sites throughout the Broadland part of the Norwich Policy Area. These proposals were resubmitted for further examination, and policies 21 and 22 were necessary in order to ensure the soundness of this part of the JCS. For the avoidance of doubt, policies 21 and 22 below apply only to the proposals previously remitted by the Court order.

7.20 Between the original adoption of the JCS and consideration of the remitted proposals, key infrastructure items serving the Broadland part of the NPA were not progressed at the rate envisaged in the original JCS. Because of this, and the further scrutiny of the remitted elements of the plan in the light of updated government guidance about the housing land supply and deliverability of the plan proposals, it was considered necessary to strengthen policy with regard to a positive approach to sustainable development, monitoring and housing land supply. Progress regarding delivery of housing land will be rigorously monitored against targets. If monitoring reveals that the Broadland part of the NPA will significantly under deliver in terms of a 5-year housing land supply (plus the "additional buffer" required in national policy), then action will be taken to address this as set out in policy 22.
**Policy 21: Implementation of proposals in the Broadland part of the Norwich Policy Area**

When considering development proposals in their part of the Norwich Policy Area, Broadland District Council will take a positive approach that reflects the presumption in favour of sustainable development contained in the National Planning Policy Framework. It will always work proactively with applicants jointly to find solutions which mean that proposals can be approved wherever possible, and to secure development that improves the economic, social and environmental conditions in the area.

Planning applications that accord with the policies in this Local Plan (and, where relevant, with policies in neighbourhood plans) will be approved without delay, unless material considerations indicate otherwise.

Where there are no policies relevant to the application or relevant policies are out of date at the time of making the decision then the Council will grant permission unless material considerations indicate otherwise – taking into account whether:

- Any adverse impacts of granting permission would significantly and demonstrably outweigh the benefits, when assessed against the policies in the National Planning Policy Framework taken as a whole; or
- Specific policies in that Framework indicate that development should be restricted.

**Policy 22: Action to ensure the delivery of housing land in the Broadland part of the Norwich Policy Area**

In addition to the JCS review “trigger” set out in paragraph 7.18, if any Monitoring Report (MR) produced after two full years from the adoption of this part-JCS Local Plan demonstrates that there is a significant shortfall (as defined below) in the 5-year supply of housing land (plus the “additional buffer” required in current national policy) affecting the Broadland part of the Norwich Policy Area (NPA), then the Councils will take the course of action specified below to address the identified shortfall.

The Councils will consider that a significant shortfall has arisen if the MR (produced annually) shows there to be less than 90% of the required deliverable housing land (as defined in current national policy).

In the event of an identified shortfall, the Councils will produce a short, focused Local Plan which will have the objective of identifying and allocating additional locations within the whole NPA area for immediately deliverable housing land to remedy that shortfall, in accordance with the settlement hierarchy set out in paragraph 6.2 of the JCS. The Local Plan will cover such a time period as may reasonably be considered necessary for the delivery delay or shortfall (however caused) to be resolved.
08 Appendices

Appendix 1: Relationship to other strategies

National
- Planning Policy Statements, Circulars & Guidance
- White Papers e.g. Health, Rural Affairs Transport and Energy
- Strategy for Sustainable Farming and Food (DEFRA, 2002)
- Transport Ten Year Plan (DoT, 2000)
- UK Waste Strategy (DEFRA, 2000)
- Delivering a sustainable transport strategy (DfT 2008)

Regional
- Regional Housing Strategy 2005-2010
- Regional Social Strategy (2003)

County
- Norfolk’s 2nd Local Transport Plan (2006-2011)
- Norfolk Action – Norfolk’s Local Area Agreement (July 2008)
- Tomorrow’s Norfolk, Today’s Challenge – A Climate Change Strategy for Norfolk (September 2008)
• Biodiversity Supplementary Planning Guidance for Norfolk (2004)
• Norfolk Biodiversity Action Plan 2004
• Norwich Area Transportation Strategy (2004)
• Norfolk Minerals and Waste LDF
• Norfolk Cultural Strategy (2002)
• Learning Disability Employment Plan for Norfolk (2006)
• Norfolk Gypsy and Traveller Strategy
• Major scheme business case: Northern Distributor Route
• Shaping Norfolk’s Future Economic Strategy (2006-2012)

Sub regional
• The Broads Plan 2004
• The Broads Core Strategy (2007)
• Greater Norwich Economic Strategy (2009-2014)
• Greater Norwich Housing Strategy (2008-2011)
• Greater Norwich Housing Market Assessment (2006)
• Sports Partnership Around Norwich (SPAN) Action Plan

South Norfolk
• South Norfolk Tourism Strategy (2004)
• South Norfolk Corporate Equality Strategy (2009-2012)
• South Norfolk Crime Reduction Partnership, Community Safety Partnership Plan (2008-2011)
• South Norfolk Alliance: Your Sustainable Community Strategy (2008-2018)
• Towards Stronger Communities: South Norfolk’s Strategy for Community Cohesion (2006)
• South Norfolk Cycling Strategy (2005)
• South Norfolk Corporate Environment Strategy (2008-2012)
• South Norfolk Leisure/Culture & Countryside Strategy (2006-2016)
• South Norfolk Council’s Strategy for Health and Well-Being (2006-2016)

Broadland
• Air Quality Management
• Anti Social Behaviour Strategy
• Broadland Community Safety Plan
• Broadland Community Strategy
• Broadland Local Plan Replacement (2006)
• Broadland Community Partnership Strategy and Action Plan
• Contaminated Land Strategy
• Climate Change Action Plan
• Corporate Equality and Diversity Action Plan
• Broadland Culture and Leisure Strategy
• Design Guide
• Broadland Youth Engagement Strategy
• Broadland Parking Standards Supplementary Planning Document (SPD) (2007)
• Broadland Recreational Open Space SPD (2007)
• Broadland Landscape Character Assessment SPD
• Broadland Affordable Housing SPD (2008)
• Broadland Rivers Catchment Flood Management Plan (Draft – June 2006)
• Broadland Rivers Catchment Abstraction Management Strategy
• Broadland Crime and Disorder and Drugs Misuse Strategy (2005)
• Historic Buildings Grant Policy (2006)

Norwich City
• Norwich: City Destination Strategy (2004)
• Norwich’s Environment Strategy 2003-2008
• Norwich City Council Economic Strategy 2003-2008
• Norwich Community Safety Strategy and Audit Report 2005-2008
• Norwich Homelessness Strategy
• A vision for Norwich: The Sustainable Community Strategy 2008-2020
• Norwich River Valleys Strategy
Appendix 2: Supporting documents

Research and studies:

Housing
- Greater Norwich Housing Market Assessment Update – November 2009
  (Greater Norwich Housing Partnership, completed Jan 2010)
- Norwich City Council Affordable Housing Viability Testing
  (Norwich City Council, June 2009)
- Strategic Housing Land Availability Assessment
  (Nathaniel Lichfield & Partners, 2009)
- Greater Norwich Housing Market Assessment
  (Greater Norwich Housing Partnership, 2007)
- Greater Norwich Sub-Region Evidence Base for a Housing Market Assessment: A Study of Housing Need and Stock Condition
  (Greater Norwich Housing Partnership, 2006)

Jobs and the economy
  (GNDP, 2009)
- Feasibility Study for a Conference Centre and Concert Hall for the Greater Norwich Area
  (Tourism UK, 2008)
- Greater Norwich Employment Growth and Employment Sites and Premises Study
  (ARUP, 2008)
- Norwich Sub-Region Retail and Town Centres Study
  (GVA Grimley, 2007)
- Ideopolis: Knowledge City Regions
  (The Work Foundation, 2006)
- Ideopolis: Knowledge City Regions: Enabling Norwich in the Knowledge Economy (The Work Foundation, 2006)

Transport
- JCS Transport Strategy Report
  (Mott Macdonald, Jan 2010)
- Baseline Conditions Report – JCS Submission
  (Mott Macdonald, Jan 2010)
- Norwich Northern Distributor Road Major Schemes Business Case: Sensitivity Tests for DfT – Core Scenario
  (Norfolk County Council, December 2009)
- Norwich Area Transportation Strategy Implementation Plan: Strategic Modelling of Joint Core Strategy
  (Mott Macdonald, 2009)
- Postwick Community Infrastructure Fund: Full Business Case
  (Norfolk County Council, October 2008)
- Major Scheme Business Case: Norwich Northern Distributor Road
  (Norfolk County Council, July 2008)
• A47 Southern Bypass Junctions Capacity Assessment Report  
  (Mott Macdonald, 2008)
• Greater Norwich Joint Core Strategy Public Transport Requirements of Growth and  
  technical note – appraisal of the emerging option (2008)  
  (Mott Macdonald, 2008)
• NNDR Report to Cabinet – Appendix 3: Statement on Justification of Need  
  (Norfolk County Council, September 2005)
• Norwich Northern Distributor Road Traffic and Economic Assessment Report  
  (Mott Macdonald, February 2005)
• Norwich Area Transportation Strategy: Options Assessment Report  
  (Mott Macdonald, October 2004)
• Norwich Area Transportation Strategy: Public Consultation Analysis Supplement  
  (Mott Macdonald, June 2004)
• Norwich Area Transportation Strategy: Public Consultation Analysis  
  (Mott Macdonald, May 2004)
• Norwich Area Transportation Strategy (NATS) review : Transport Related Problems and  
  Issues  
  (Norfolk County Council, April 2003)

Environment
• Habitats Regulation Assessment (Appropriate Assessment) of the Joint Core Strategy  
  for Broadland, Norwich and South Norfolk:  
  Task 1 (Mott Macdonald, 2008)  
  Task 2 (Mott Macdonald, 2009)  
  Task 2 (Mott Macdonald, update Feb 2010)
• Greater Norwich Development Partnership Green Infrastructure Delivery Plan  
  (GNDP, 2009)
• Historic Characterisation and Sensitivity Assessment  
  (Norfolk County Council, 2009)
• Greater Norwich Integrated Water Cycle Study – Stages 1 (2007), Stage 2a (2008) and  
  Stage 2b (2009):  
  Stage 1 (Scott Wilson, 2007)  
  Stage 2a (Scott Wilson, 2008)  
  Stage 2b (Scott Wilson, 2009)  
  Stage 2b Final (Scott Wilson, 2010) with Natural England response and Stakeholder  
  Position Statements
• Sustainable Energy Study for the Joint Core Strategy for Broadland, Norwich and South  
  Norfolk  
  (ESD, 2009)
• Greater Norwich Development Partnership Green Infrastructure Study  
  (Chris Blandford Associates, 2008)
• Strategic Flood Risk Assessment  
  (Millard Consulting, 2007)
• Sustainability Appraisal Scoping Report  
  (Scott Wilson, 2007)
• Pre-submission JCS Sustainability Appraisal Report  
  (Scott Wilson, 2009)
Infrastructure
- Greater Norwich Infrastructure Needs and Funding Study (EDAW/AECOM, 2009)
- Norwich Growth Area Infrastructure Needs and Funding Study (EDAW, 2007)

Stages in JCS development
- Issues and Options informal discussion workshops (June – July 2007)
- Issues and Options consultation (December 2007 – February 2008)
- Issues and Options: Report of consultation (July 2008)
- Public Regulation 25 consultation (March – June 2009)
- Regulation 30 statements

Topic Papers
- City Centre
- Employment and Town Centre Uses
- Environment
- Homes and Housing
- Implementation and Governance
- Infrastructure
- Settlement Hierarchy
- Strategy to Accommodate Major Housing Growth in the Norwich Policy Area
- Transport

Background documents commissioned by local authorities informing the Joint Core Strategy:

Broadland
- Broadland District Landscape Character Assessment (2008)
- Local Development Scheme (2007)
- Broadland PPG 17 open-spaces, indoor sports and community recreation assessment (2007)
- Various conservation area appraisals
- Blue Boar Lane Development Brief (2006)
- Broadland District Landscape Assessment and Review of Areas of Important Landscape Quality (1999)

Norwich
- Delivering for Norwich, Corporate Plan 2008-2010
- Northern City Centre Area Action Plan (Adopted Spring 2010)
- Northern City Centre Area Action Plan, Addendum to submission document (July 2009)
- Northern City Centre Area Action Plan (Submission Report December 2008)
- Norwich City Centre Conservation Area Appraisal:
1. City Centre
2. Eaton
3. Mile Cross
4. Old Lakenham
5. St Matthews
6. Thorpe Hamlet
7. Thorpe Ridge
8. Trowse Millgate

- Norwich Needs: Research for the Local Area Agreement. Phase 1: Deprivation in Norwich
- Norwich Open Space Needs Assessment. Leisure & the Environment
- Norwich Open Space Needs Assessment. Area Profiles
- Norwich Strategic Sites Study (2005)

**South Norfolk**
- South Norfolk Wind Turbine Sensitivity Study (2008)
- Local Development Scheme 2007
- NRP Development Framework. Supplementary Planning Document
- Final Report Agreed by Gypsy and Traveller Working Group
- South Norfolk Landscape Character Assessment:
  - Volume 1 – Landscape Types of South Norfolk (2001)
  - Volume 2 – Landscape Character Areas of the Norwich Policy Area (2001)
  - Volume 3 – Landscape Character Areas of the Rural Policy Area (2008)
- South Norfolk PPG17 Open Spaces, Indoor Sports and Community Recreation Assessment (2007)
- South Norfolk Conservation Area Appraisals
- South Norfolk Retail Study (2004)
Appendix 3: Superceded policies and changes to local plan proposals maps

**Broadland District Local Plan (Replacement) 2006**
- GS6 Development beyond the plan period – strategic reserve
- ENV1 Protection and enhancement of environmental assets
- ENV 24 Development affecting the Broads Area
- HOU2 Strategic Sites
- HOU3 Major housing development phasing
- HOU4 Affordable housing within larger developments
- HOU 10 Variety of dwelling types, and housing to meet defined needs
- EMP 10 Tourist facilities
- TRA 17 Landscaping of new or improved highways
- CS2 Sustainable drainage systems
- CS9 Flood risk issues in all development proposals

**City of Norwich Replacement Local Plan 2004**
- HBE19 Design for safety and security
- EP12 Development in other areas at risk of flooding
- HOU1 Housing needs and monitoring
- HOU4 Affordable Housing
- HOU7 Phasing of housing development

**Saved South Norfolk Local Plan Policies**
- SP1 Sustainable development
- SP2 High standard of design
- SP3 Location of growth
- SP4 Impact on infrastructure
- SP5 Housing land supply
- SP6 Main objectives for employment
- SP7 Main objective for shopping
- SP8 Main objective for tourism
- SP9 Main objective for recreation and leisure
- SP10 Main objective for transport and movement
- ENV1 Protection of landscape
- ENV4 Broads Area
- ENV7 Strategy for the distribution of development
- ENV16 Local nature reserves
- IMP1 Design
- IMP7 Provision of Infrastructure
- IMP26 Percentage for art
- HOU1 Housing land requirement
- HOU12 Affordable Housing
- HOU13 Local needs housing
- UTL8 Contributions to schools
- UTL10 Contributions to recreation and community facilities
- TRA4 Provision for public transport
Revisions to the Proposals Maps have been made accordingly and are available to view at www.gndp.org.uk
Appendix 4: Definition of the Norwich Policy Area

Key
- Policy Area including Salhouse
- Parish boundaries

1. Bawburgh
2. Beeston St. Andrew
3. Bixley
4. Blakeney
5. Bracon Ash
6. Bramerton
7. Brundall
8. Caister St Edmund
9. Colney
10. Costessey
11. Cringleford
12. Drayton
13. East Carleton
14. Easton
15. Flordon
16. Framingham Earl
17. Framingham Pigot
18. Great & Little Plumstead
19. Great Melton
20. Hellesden
21. Hemblington
22. Hethersett
23. Horsford
24. Horsham St. Faith
25. Keswick
26. Ketteringham
27. Kirby Bedon
28. Little Melton
29. Long Stratton
30. Marlingford & Colton
31. Mulbarton
32. Newton Flotman
33. Norwich
34. Old Catton
35. Poringland
36. Postwick with Witton
37. Rackheath
38. Salhouse
39. Spixworth
40. Sprowston
41. Stoke Holy Cross
42. Surlingham
43. Swainsthorpe
44. Swardston
45. Tasburgh
46. Taverham
47. Thorston and Hapton
48. Thorpe St. Andrew
49. Trowse with Newton
50. Wymondham
Appendix 5

Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle
Note:
This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.
Note: This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.
Note: This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.
Note: This appendix illustrates the trajectory as anticipated in 2010 and historic information back to the base date of the now revoked East of England Plan. Not only is this page of the appendix out of date but it also includes assumptions about delivery from elements of the plan that were remitted by court order. It is reproduced here solely for historical information. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the published Annual Monitoring Report.
Growth locations (excluding the Broadland part of the Norwich Policy Area)

This table illustrates the trajectory as anticipated in 2010 for the Plan excluding figures for the Broadland part of the Norwich Policy Area. It is now out of date. For updated information on housing trajectories please see the Annual Monitoring Report. For a housing trajectory in the Broadland part of the NPA see Appendix 6a and the Annual Monitoring Report.

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<td>Easton/ Costessay (1,000)</td>
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<tr>
<td>Additional smaller sites around South Norfolk NPA (1,800)</td>
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<td>150</td>
<td>150</td>
<td>150</td>
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<td>150</td>
<td>1,800</td>
<td>150</td>
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<tr>
<td>Additional sites around Rural South Norfolk</td>
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<td>84</td>
<td>84</td>
<td>84</td>
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<td>83</td>
<td>1,000</td>
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<td>Additional urban capacity in rural South Norfolk</td>
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<td>1082</td>
<td>987</td>
<td>13,715</td>
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Appendix 6a

Growth Locations in the Broadland part of the NPA

<table>
<thead>
<tr>
<th>District</th>
<th>Total Number of Units per Year</th>
<th>TOTAL</th>
<th>Average annual build rate</th>
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<tr>
<td></td>
<td>14/15</td>
<td>15/16</td>
<td>16/17</td>
</tr>
<tr>
<td>Rackheath</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>77</td>
<td>77</td>
<td>70</td>
</tr>
<tr>
<td>Remainder of Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle (inside NDR)</td>
<td>20</td>
<td>163</td>
<td>234</td>
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<tr>
<td>Additional small sites around Broadland NPA</td>
<td>98</td>
<td>148</td>
<td>161</td>
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<tr>
<td>Total</td>
<td>195</td>
<td>388</td>
<td>465</td>
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</table>

This trajectory illustrates the delivery of homes as anticipated at July 2013. It should not be summed with the figures produced in Appendix 6. For up to date information please see the latest Annual Monitoring Report.
Appendix 7: Implementation Framework and Critical Path outside of the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date. This table was correct at late 2010 and relates only to infrastructure that is not required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website. Updated information on infrastructure schemes needed in part to support some element of the previously remitted growth proposals in the Broadland part of the NPA is available in Appendix 7a.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

**Priority 1 Infrastructure** is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

**Priority 2 Infrastructure** is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.

**Priority 3 Infrastructure** is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposal.

Table 1 – Infrastructure Framework shows infrastructure requirements to support growth across the JCS period.
Table 1 – Infrastructure Framework

**Infrastructure Framework: Priority 1 projects 2008 - 2016**

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

**Waste Water**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>SP3</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>42.9</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
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<tr>
<td>SP4</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>5</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
<tr>
<td>SP5</td>
<td>Wymondham upgrade (Option 2)</td>
<td>Wymondham</td>
<td>Anglian Water</td>
<td>13.8</td>
<td>Developer/ AW provision</td>
<td>2016</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>

**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.
Green Infrastructure

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth</td>
<td>Local Authorities/Developer</td>
<td>tba</td>
<td>Local authority/Developer contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
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</table>

Electricity

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

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<thead>
<tr>
<th>Ref</th>
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<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimate delivery dates by</th>
<th>Source</th>
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<td>U1</td>
<td>New primary sub-station on existing site (Hurricane Way)</td>
<td>Expansion of the employment area - airport business park</td>
<td>EDF energy</td>
<td>5.5</td>
<td>70% AMP ● 30% Developer contributions</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T4 &amp; T17</td>
<td>Thickthorn junction improvement including bus priority and park and ride improvements</td>
<td>Wymondham, Hethersett and Cringleford Growth Locations</td>
<td>Norfolk County Council/ Highways Agency</td>
<td>30</td>
<td>Developer contributions</td>
<td>2016 (scheme expected to be phased)</td>
<td>NATS</td>
</tr>
<tr>
<td>T5</td>
<td>Longwater junction improvements</td>
<td>West Growth Location</td>
<td>Norfolk County Council/ Highways Agency</td>
<td>30</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T6</td>
<td>Norwich Research Park transport infrastructure phase 1</td>
<td>Norwich Research Park</td>
<td>Norfolk County Council/ Highways Agency</td>
<td>5</td>
<td>Growth Point ● Developer contributions</td>
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<td>NATS</td>
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<td>T7</td>
<td>Grapes Hill bus improvements</td>
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<td>Estimated delivery dates by</td>
<td>Source</td>
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</tr>
<tr>
<td>T7</td>
<td>Bus improvements Newmarket Road</td>
<td>Wymondham, Hethersett and Cringleford ● Norwich Area Transportation Strategy including delivery of BRT</td>
<td>Norfolk County Council</td>
<td>0.4</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
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<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 1</td>
<td>Broadland Fringe Growth (subject to location of growth)</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus Rapid Transit via Dereham Road - Phase 1</td>
<td>West Growth Location</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.25</td>
<td>Growth Point</td>
<td>2010 – 2011</td>
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<tr>
<td>Ref</td>
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<td>Source</td>
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</tr>
<tr>
<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 1</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
</tr>
<tr>
<td>T13</td>
<td>Bus priority route via Hethersett Lane/ Hospital/ Norwich Research Park/ University of East Anglia/ City centre</td>
<td>Wymondham, Hethersett and Cringleford Growth Location &amp; NRP</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.7</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
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<td>NATS</td>
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<tr>
<td>T14</td>
<td>Bus priority route via B1172 phase 1</td>
<td>Wymondham, Hethersett Growth Location</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.7</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2016</td>
<td>NATS</td>
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<td>Ref</td>
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<td>Estimated delivery dates by</td>
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</tr>
<tr>
<td>T18</td>
<td>Pedestrian / Cycle links to Longwater</td>
<td>West Growth Locations</td>
<td>Norfolk County Council</td>
<td>1.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
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<td>NATS</td>
</tr>
<tr>
<td>N/A</td>
<td>Lady Julian Bridge</td>
<td>NATS ● City centre</td>
<td>Norwich City Council</td>
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<td>Growth Point ● S106 ● EEDA</td>
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<td>NATS</td>
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<tr>
<td>N/A</td>
<td>Barrack Street ring-road improvement works</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>1.3</td>
<td>Growth Point</td>
<td>Delivered</td>
<td>NATS</td>
</tr>
<tr>
<td>N/A</td>
<td>St Augustine's Gyratory</td>
<td>Norwich Area Transportation Strategy including delivery of BRT ● City centre bus enhancements</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>3.49</td>
<td>Growth point 2.42 ● LTP 1.04 ● S106 0.03</td>
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<td>NATS</td>
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<td><strong>Totals</strong></td>
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</tr>
</tbody>
</table>

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116
**Infrastructure Framework: Priority 1 projects 2016 -2021**

*The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)*

**Waste Water**

*The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities*

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP2</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
<td>TBA</td>
<td>Developer/AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage 2b</td>
</tr>
<tr>
<td>SP7</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>14.4</td>
<td>Developer/AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage 2b</td>
</tr>
<tr>
<td>SP8</td>
<td>Whitlingham Upgrade (Option 2)</td>
<td>Norwich</td>
<td>Anglian Water</td>
<td>0.8</td>
<td>Developer/AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage 2b</td>
</tr>
<tr>
<td>SP9</td>
<td>Wymondham upgrade (Option 2)</td>
<td>West growth locations</td>
<td>Anglian Water</td>
<td>22.4</td>
<td>Developer/AW provision</td>
<td>2021</td>
<td>Water Study 2b Cycle Stage 2b</td>
</tr>
</tbody>
</table>

**Potable Water**

*Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.*
### Green Infrastructure

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment and Utilities). All potable water improvements are delivered through the AMP process and are not included in this table.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 15</td>
<td>Enhance public access to Yare Valley and Bawburgh Lakes</td>
<td>Overall scale of growth in particular Wymondham, Hethersett and Cringleford Growth Locations</td>
<td>Local authorities/Developers</td>
<td>tba</td>
<td>Local authorities/Developer contribution</td>
<td>2021</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>

### Transportation

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment and Utilities). All potable water improvements are delivered through the AMP process and are not included in this table.

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<th>Ref</th>
<th>Scheme</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>T3</td>
<td>Long Stratton bypass A140 including improvement at Hempnall crossroads</td>
<td>Long Stratton Growth Locations</td>
<td>Developer / Norfolk County Council</td>
<td>20</td>
<td>Developer contributions</td>
<td>2021</td>
<td>Developer</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in:</td>
<td>Promoter/Delivery body</td>
<td>Total Cost £m</td>
<td>Funding sources</td>
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</tr>
<tr>
<td>T6</td>
<td>Norwich Research Park transport infrastructure phase 2</td>
<td>Norwich Research Park</td>
<td>Norfolk County Council/Highways Agency</td>
<td>8</td>
<td>Growth Point ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>Bus priority - approach to Harford Junction</td>
<td>Overall Growth</td>
<td>Norfolk County Council</td>
<td>2</td>
<td>Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 1</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.6</td>
<td>Growth Point ● LTP ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 2</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>6</td>
<td>Growth Point ● LTP ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 2</td>
<td>Broadland Fringe Growth</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
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<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in:</td>
<td>Promoter/Delivery body</td>
<td>Total Cost £m</td>
<td>Funding sources</td>
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</tr>
<tr>
<td>T9</td>
<td>Bus improvements Dereham Road phase 2</td>
<td>West Growth Locations</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.6</td>
<td>Growth Point ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td>DfT ● Growth Point ● Developer contributions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 2</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021</td>
<td>NATS</td>
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<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
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</tbody>
</table>
# Infrastructure Framework: Priority 1 projects 2021 -2026

The base date for the Strategy is 2008. This table includes projects from 2008 - 2011 (the adoption of the Strategy) and 2011 - 2016 (the first 5 years of delivery post adoption)

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## Waste Water

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

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<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP2</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Hethersett, Cringleford, Easton/ Costessey</td>
<td>Developer</td>
<td>tba</td>
<td>Developer/ AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
</tr>
<tr>
<td>SP10</td>
<td>Whitlingham Upgrade (Option 1)</td>
<td>Norwich Policy Area</td>
<td>Anglian Water</td>
<td>4.3</td>
<td>Developer/ AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
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<td>SP11</td>
<td>Whitlingham Upgrade (Option 2)</td>
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<td>Anglian Water</td>
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<td>Developer/ AW provision</td>
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<td>Water Cycle Study Stage 2 B</td>
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<tr>
<td>Ref</td>
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<tr>
<td>SP12</td>
<td>Wymondham upgrade (Option 2)</td>
<td>West growth locations</td>
<td>Anglian Water</td>
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<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
</tr>
<tr>
<td>SP13</td>
<td>Sewerage upgrade - solutions subject to ongoing discussions with Anglian Water</td>
<td>Long Stratton</td>
<td>Anglian Water</td>
<td>Tba</td>
<td>Developer/AW provision</td>
<td>2026</td>
<td>Water Cycle Study Stage 2 B</td>
</tr>
</tbody>
</table>
**Potable Water**

Water supply is adequate for growth in the short-term. Supply will require enhancement in the longer term, Anglian Water are committed to finding a solution by 2012. Solutions will be funded through the AMP process and developer contributions.

**Electricity**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
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<th>Required for growth in:</th>
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</thead>
<tbody>
<tr>
<td>U5</td>
<td>Replacement of transformers and switchgear in existing site (Hapton)</td>
<td>Long Stratton</td>
<td>EDF energy</td>
<td>2.53</td>
<td>83% AMP 17% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>U6</td>
<td>Replacement of transformers and switchgear in existing site (Wymondham)</td>
<td>SW Growth location</td>
<td>EDF energy</td>
<td>2.53</td>
<td>67% AMP 33% Developer contributions</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
### Transportation

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as Priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T7</td>
<td>City centre bus improvements phase 3</td>
<td>Overall Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>6</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T8</td>
<td>Bus Rapid Transit via Fakenham Road - A1067 - Phase 3</td>
<td>Broadland Fringe Growth</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T9</td>
<td>Bus improvements Dereham Road phase 3</td>
<td>West Growth Location</td>
<td>Norfolk County Council/ Norwich Council City</td>
<td>2.6</td>
<td>Growth Point ● LTP ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
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<tr>
<td>Ref</td>
<td>Scheme</td>
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</tr>
<tr>
<td>T10</td>
<td>Bus Rapid Transit via Yarmouth Road - Phase 3</td>
<td>Broadland Business Park Expansion</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council ● DfT ● Growth Point ● Developer contributions</td>
<td>2021-2026</td>
<td>NATS</td>
</tr>
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</table>
## Education

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED3</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2011</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED4</td>
<td>60 place pre-school</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developers</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
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<th>Source</th>
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</thead>
<tbody>
<tr>
<td>HC1</td>
<td>GPs Surgery (3 GPs)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.03</td>
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<tr>
<td>HC2</td>
<td>Dentists surgery (4 Dentists)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>1.25</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC6</td>
<td>Expansion of existing facilities (2 GPs and 2 Dentists)</td>
<td>Broadland Elsewhere</td>
<td>Health Authority</td>
<td>0.9</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC12</td>
<td>Expansion of existing facilities (7 GPs and 7 Dentists)</td>
<td>South Norfolk Elsewhere</td>
<td>Health Authority</td>
<td>3.5</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
<td>Health Authority</td>
<td>10</td>
<td>Health Authority / Developer contribution</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study</td>
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</tbody>
</table>
## Green infrastructure

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. Green infrastructure projects are being assessed following completion of the Green Infrastructure Delivery Plan. Open space will be planned in relation to each growth location and planned in line with development.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
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<tbody>
<tr>
<td>N/A</td>
<td>Wensum River Parkway</td>
<td>Overall scale of growth</td>
<td>HEART/ Norwich City Council</td>
<td>0.07</td>
<td>Growth Point</td>
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<td>Green Infrastructure Steering Group</td>
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<td>N/A</td>
<td>Catton Park visitor centre and park improvements</td>
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<td>Catton Park Trust/ Norfolk County Council</td>
<td>0.37</td>
<td>Growth Point</td>
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<td>Growth Point</td>
<td>Delivered</td>
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<tr>
<td>N/A</td>
<td>Wooded ridge</td>
<td>Overall scale of growth</td>
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<td>Delivered</td>
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<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
<td>Overall scale of growth</td>
<td>Various</td>
<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding</td>
<td>2016</td>
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</table>
### Infrastructure Framework: Priority 2 projects 2016-2021

#### Education
The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure.

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<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>for</th>
<th>Promoter/Delivery body</th>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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</tr>
<tr>
<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED5</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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Totals

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Sources to be identified.
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
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<td>Norfolk County Council</td>
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<tr>
<td>ED7</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Wymondham</td>
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<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED7</td>
<td>60 place pre-school</td>
<td>Hethersett</td>
<td></td>
<td>Norfolk County Council</td>
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<td>Easton</td>
<td></td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>ED10</td>
<td>Expanded secondary school provision</td>
<td>Wymondham, Hethersett, Cringleford, Costessey / Easton</td>
<td></td>
<td>Norfolk County Council</td>
<td>10</td>
<td>Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study and ongoing assessment of options</td>
</tr>
</tbody>
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The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The 3 categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

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<tr>
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<td>Expansion of existing facilities (6 GPs and 5 Dentists)</td>
<td>Norwich City</td>
<td>Health Authority</td>
<td>4.5</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC7</td>
<td>Expansion of existing facilities (3 GPs and 2 Dentists)</td>
<td>Wymondham</td>
<td>Health Authority</td>
<td>1.8</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>HC9</td>
<td>Expansion of existing facilities (1 GP and 1 Dentists)</td>
<td>Hethersett</td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>HC11</td>
<td>Expansion of existing facilities (1 GP and 1 Dentist)</td>
<td>Easton / Costessey</td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
<td>Health Authority</td>
<td>6</td>
<td>Health Authority / Developer contribution</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>for delivery body</th>
<th>Total Cost £m</th>
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<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
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<td>tba</td>
<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
<td>2021</td>
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| Totals |  | 40.19 |
**Infrastructure Framework: Priority 2 projects 2021-2026**

**Education**

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<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
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<th>Promoter/Delivery body</th>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>ED6</td>
<td>60 place pre-school co-located with 600sqm combined community centre and library</td>
<td>Norwich City</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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</tr>
<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Wymondham</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>2FE place primary</td>
<td>Cringleford</td>
<td>Norfolk County Council</td>
<td>2.3</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>1 FE place primary</td>
<td>Hethersett</td>
<td>Norfolk County Council</td>
<td>2.3</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Long Stratton</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>ED8</td>
<td>2FE primary with integrated 60 place pre-school co-located with combined community centre and library</td>
<td>Long Stratton</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in:</td>
<td>Promoter/Delivery body</td>
<td>Total Cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
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<tr>
<td>ED8</td>
<td>60 place pre-school</td>
<td>Cringleford</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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</tr>
<tr>
<td>ED8</td>
<td>1FE primary</td>
<td>Easton</td>
<td>Norfolk County Council</td>
<td>2.5</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>ED10</td>
<td>Expanded secondary school provision</td>
<td>Wymondham, Hethersett, Cringleford, Costessey / Easton, Long Stratton, rest of South Norfolk NPA</td>
<td>Norfolk County Council</td>
<td>10</td>
<td>Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study and ongoing assessment of options</td>
<td></td>
</tr>
</tbody>
</table>

**Healthcare**

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<tr>
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<th>Required for growth in:</th>
<th>Promoter/Delivery body</th>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<tbody>
<tr>
<td>HC8</td>
<td>Combined surgery (2 GPs and 2 Dentists)</td>
<td>Long Stratton</td>
<td>Health Authority</td>
<td>1.5</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study</td>
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<td>Ref</td>
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<td>Total Cost £m</td>
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</tr>
<tr>
<td>HC10</td>
<td>Expansion of existing facilities (1 GP and 1 Dentists)</td>
<td>Cringleford</td>
<td></td>
<td>Health Authority</td>
<td>0.55</td>
<td>Health Authority / Developer contribution</td>
<td>2021 - 2026</td>
</tr>
<tr>
<td>HC12</td>
<td>Expansion of existing facilities (1 GP )</td>
<td>South Norfolk Elsewhere</td>
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<td>Health Authority</td>
<td>0.6</td>
<td>Health Authority / Developer contribution</td>
<td>2026</td>
</tr>
<tr>
<td>HC13</td>
<td>Hospital bed requirements</td>
<td>Overall scale of growth</td>
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<td>Health Authority</td>
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<td>Health Authority / Developer contribution</td>
<td>2026</td>
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</table>
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<tbody>
<tr>
<td>GI 1-14</td>
<td>Green infrastructure projects and open space</td>
<td>Overall scale of growth</td>
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<td>Local authorities ● Developers contributions ● Other funding sources to be identified</td>
<td>2026</td>
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</table>

| Totals |       |           | 39.05       |


# Infrastructure Framework: Priority 3 projects 2008-2016

## Community facilities

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
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<td>Community facilities</td>
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<td>4</td>
<td>Private companies ● Developers ● Local authorities</td>
<td>2011-16</td>
<td>Infrastructure Needs and Funding Study</td>
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### Infrastructure Framework: Priority 3 projects 2016-2021

#### Community facilities

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<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
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<td>Private companies</td>
<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>CF3-5</td>
<td>Community facilities</td>
<td>South Norfolk</td>
<td>South Norfolk Council</td>
<td>3.1</td>
<td>Private companies</td>
<td>2016 - 2021</td>
<td>Infrastructure Needs and Funding Study</td>
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</table>
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<tr>
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<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
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<td>tba</td>
<td>Norfolk County Council / Developer contribution</td>
<td>2016-2021</td>
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<td>CI13</td>
<td>Ambulance Service</td>
<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
<td>tba</td>
<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
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<tr>
<td>CI 1</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) ● Norwich (22 officers) ● South Norfolk (32 officers)</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer contribution</td>
<td>2016-2021</td>
<td>Infrastructure Needs and Funding Study</td>
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**Infrastructure Framework: Priority 3 projects 2021-2026**

**Community facilities**

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<th>for</th>
<th>Promoter/Delivery body</th>
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<tr>
<td>CF 2</td>
<td>Community facilities</td>
<td>Norwich</td>
<td></td>
<td>Norwich City Council</td>
<td>3.05</td>
<td>Private companies  ● Developers  ● Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
<tr>
<td>CF3-5</td>
<td>Community facilities</td>
<td>South Norfolk</td>
<td></td>
<td>South Norfolk Council</td>
<td>3.1</td>
<td>Private companies  ● Developers  ● Local authorities</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
</tr>
</tbody>
</table>
## Community services

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required growth in:</th>
<th>for</th>
<th>Promoter/ Delivery body</th>
<th>Total Cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI 12</td>
<td>Fire Service</td>
<td>Overall scale of growth</td>
<td>Norfolk County Council</td>
<td>TBA</td>
<td>Norfolk County Council / Developer Contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>CI 13</td>
<td>Ambulance Service</td>
<td>Overall scale of growth</td>
<td>Norfolk Ambulance Service</td>
<td>TBA</td>
<td>Norfolk Ambulance Service / Developer contribution</td>
<td>2021-2026</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
<tr>
<td>CI 11</td>
<td>Police Safer Neighbourhood teams - Broadland (18 officers) ● Norwich (44 officers) ● South Norfolk (64 officers)</td>
<td>Overall scale of growth</td>
<td>Norfolk Constabulary</td>
<td>5.25</td>
<td>Norfolk Constabulary / Developer Contribution</td>
<td>2021 - 2026</td>
<td>Infrastructure Needs and Funding Study</td>
<td></td>
</tr>
</tbody>
</table>

**Totals** 13.4
Appendix 7a: Implementation Framework and Critical Path inside the Broadland part of the Norwich Policy Area

The framework lists infrastructure required to facilitate development promoted in this JCS. It is early work and is not intended to be an exhaustive or precise list of the entire infrastructure that will be needed by 2026. Additional infrastructure will be needed beyond this date, including in the growth triangle where at least 3,000 dwellings are proposed after 2026. This table was correct at June 2013 and relates only to infrastructure that is required to deliver any aspect of the plan that was previously remitted. Updated information on the schemes listed is contained within the published LIPP available on the GNDP website.

The GNDP will manage a delivery programme supporting the implementation of this Joint Core Strategy. The programme will be developed through the Local Investment Plan and Programme (LIPP). As decisions are made locally and nationally on prioritisation and funding of infrastructure, the content, phasing and priorities of this list will be amended accordingly. This will happen via the LIPP process which will be subject to regular review.

The definition of the three levels of priority is derived from the Greater Norwich Infrastructure Needs and Funding Study (INF 1; in particular see Page 194) but expands the Study’s definition to explicitly recognise the differential impact on the overall strategy. Consequently, the categories are:

Priority 1 Infrastructure is fundamental to the strategy or must happen to enable physical growth. It includes key elements of transport, water and electricity infrastructure and green infrastructure requirements from the Habitats Regulation Assessment. Failure to deliver infrastructure that is fundamental to the strategy would have such an impact that it would require the strategy to be reviewed. This particularly applies to the NDR and the associated package of public transport enhancement. The sustainable transport requirements of the strategy and much of the development to the north of the built up area is dependent on these key elements of NATS.

Priority 2 Infrastructure is essential to significant elements of the strategy and required if growth is to be achieved in a timely and sustainable manner. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals, particularly in the medium term as pressures build and any existing capacity is used up.

Priority 3 Infrastructure is required to deliver the overall vision for sustainable growth but is unlikely to prevent development in the short to medium term. The overall quality of life in the area is likely to be poorer without this infrastructure. Failure to address these infrastructure requirements is likely to result in the refusal of planning permission for individual growth proposals.

Table 1 – Infrastructure Framework shows infrastructure requirements to support growth across the JCS period.
Table 1 – Infrastructure Framework

<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>The base date for the Strategy is 2008. This table includes projects expected to be delivered from the base date up to 2016 (the first 5 years of delivery post adoption of the non-remitted parts of the JCS)</td>
</tr>
<tr>
<td>The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities</td>
</tr>
</tbody>
</table>

### Waste water

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade – Anglian Water propose a north east trunk sewer to manage growth in the north east as a result of the detailed study ‘Water Cycle Study 2B’</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/Developer</td>
<td>61.6 (across whole period)</td>
<td>AW provision/Developer</td>
<td>in phases up to 2026</td>
<td>Water Cycle Study Stage 2B</td>
</tr>
</tbody>
</table>

### Green Infrastructure

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI16</td>
<td>Retention and re-creation of Mousehold Heath and link to the surrounding countryside</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/Developer</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in</td>
<td>Promoter/ delivery body</td>
<td>Total cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
</tr>
<tr>
<td>-----</td>
<td>--------</td>
<td>------------------------</td>
<td>--------------------------</td>
<td>---------------</td>
<td>----------------</td>
<td>-----------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>GI17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local Authorities/ Developer</td>
<td>0.21</td>
<td>Local authority/CIL/Developer land contributions</td>
<td>2016</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>

**Transportation**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
</table>
| T1 | Norwich Northern Distributor Road | Overall scale of growth in particular:  
• Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle  
• Broadland: Smaller sites in the NPA (2000 dwellings) depending on site specifics  
• Norwich Area Transportation Strategy including delivery of BRT  
• Airport employment allocation | Norfolk County Council | 107 (spend up to 2016) | DFT £67.5m /CIL /Norfolk County Council | 2016 (continues to 2021) | NATS |
<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
</table>
| T2a | Postwick Junction improvements | Overall scale of growth in particular:  
- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle  
- Norwich Area Transportation Strategy including delivery of NDR and expanded Postwick Park and Ride  
- Broadland Business Park and expansion | Norfolk County Council | 21.0 | DfT funding /Norfolk County Council | 2016 | NATS |
| T11 | Bus Rapid Transit via Salhouse Road and Gurney Road | Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | Norfolk County Council/ Norwich City Council | 1.8 | Rackheath PoD (Broadland District Council)/ Norfolk County Council/ DfT/CIL | 2016 | NATS |
| T15 | Completion of local development Link Road | Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | Developer Lead | 2.5 | Developer contributions | 2016 | NATS |
The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

### Waste Water

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP1</td>
<td>Sewerage upgrade - north east trunk sewer</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>AW/ Developer</td>
<td>See 2008-16 period</td>
<td>AW provision/ Developer</td>
<td>in phases up to 2026</td>
<td>Water Cycle Study Stage 2: B</td>
</tr>
</tbody>
</table>

### Utilities

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
</table>
| U2  | New primary substation on new site (Norwich Airport north) | • Airport employment allocation  
• Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | UK Power Networks        | 6.3           | UKPN            | 2021                      | Infrastructure Needs and Funding Study 2009 |


<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U3</td>
<td>New grid sub-station on existing sites (Norwich East)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>UK Power Networks</td>
<td>17</td>
<td>100% AMP funded</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>

**Green Infrastructure**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 16</td>
<td>Retention and re-creation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local authorities/ Developers</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2021</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular: Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Local authorities/ Developers</td>
<td>0.21</td>
<td>Local authority/CIL/ Developer land contribution</td>
<td>2021</td>
<td>Green Infrastructure Delivery Plan</td>
</tr>
</tbody>
</table>
### Transport

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in particular:</th>
<th>Promoter/ delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
</table>
| T1  | Norwich Northern Distributor Road | - Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle  
- Broadland: Smaller sites in the NPA (2000 dwellings) depending on site specifics  
- Norwich Area Transportation Strategy including delivery of BRT  
- Airport employment allocation | Norwich County Council | 13  
(spend after 2016) | Norfolk County Council | 2016 to 2021 | NATS |
| T2b | Postwick Park and Ride | Overall scale of growth in particular:  
- Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | Norfolk County Council | 6  
(earliest possible delivery 2015) | Remaining Growth Point funding / CIL | 2021 | NATS |
| T11 | Bus improvements via Salhouse Road and Gurney Road | Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle | Norfolk County Council/Norwich City Council | 2.6  
(Rackheath PoD / Norfolk County Council / CIL) | 2021 | NATS |
<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>2.5</td>
<td>Norfolk County Council/ DfT/CIL</td>
<td>2021</td>
<td>NATS</td>
</tr>
<tr>
<td>T15</td>
<td>Completion of local Development Link Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Developer Lead</td>
<td>2.5</td>
<td>Developer contributions</td>
<td>2021</td>
<td>NATS</td>
</tr>
</tbody>
</table>

**Infrastructure Framework: Priority 1 projects 2021 -2026**

The table below lists the Priority 1 infrastructure requirements to deliver the Joint Core Strategy. The categories of infrastructure that are viewed as priority 1 are Transport, Green Infrastructure (relating to the Habitats Regulations Assessment) and Utilities.

<table>
<thead>
<tr>
<th>Waste Water</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ref</td>
</tr>
<tr>
<td>-----</td>
</tr>
<tr>
<td>SP1</td>
</tr>
</tbody>
</table>
## Electricity

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>U4</td>
<td>New primary substation on new site (Sprowston / Rackheath)</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrews growth triangle</td>
<td>UK Power Networks</td>
<td>4.3</td>
<td>UKPN / CIL</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>

## Green Infrastructure

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>GI 16</td>
<td>Retention and re-creation of Mousehold Heath to the surrounding countryside</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>0.033</td>
<td>Local authority/ CIL/ On-site design</td>
<td>2026</td>
<td>Green Infrastructure Delivery Plan</td>
<td></td>
</tr>
<tr>
<td>GI 17</td>
<td>Broads Buffer Zone</td>
<td>Overall scale of growth in particular Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>0.21</td>
<td>Local authority/CIL /Developer land contributions</td>
<td>2026</td>
<td>Green Infrastructure Delivery Plan</td>
<td></td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in</td>
<td>Promoter/ delivery body</td>
<td>Total cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
</tr>
<tr>
<td>-----</td>
<td>--------</td>
<td>------------------------</td>
<td>--------------------------</td>
<td>---------------</td>
<td>----------------</td>
<td>-----------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>T11</td>
<td>Bus improvements via Salhouse Road and Gurney Road</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>0.6</td>
<td>Rackheath PoD / Norfolk County Council/ DfT /CIL</td>
<td>2026</td>
<td>NATS</td>
</tr>
<tr>
<td>T12</td>
<td>Bus Rapid Transit via Norwich airport A140 to City centre</td>
<td>Old Catton, Sprowston, Rackheath, and Thorpe St Andrew Growth triangle</td>
<td>Norfolk County Council/ Norwich City Council</td>
<td>7.5</td>
<td>Norfolk County Council/ DfT /CIL</td>
<td>2026</td>
<td>NATS</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>256.9</td>
</tr>
</tbody>
</table>
**Infrastructure Framework: Priority 2 projects 2008-2016**

The table below lists the Priority 2 infrastructure requirements to deliver the Joint Core Strategy. The three categories of infrastructure that are viewed as Priority 2 are Education, Healthcare and Green Infrastructure. The Health Authority will take a flexible approach to the provision of hospital beds. Locations will be determined by the Health Authority at a later date. It is presumed funding will come through the AMP.

NOTE: All schools in the period 2008-16 are expected to be covered by S106 or are covered by Children’s Services funding.

**Infrastructure Framework: Priority 2 projects 2016-2021**

**Education**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED1</td>
<td>60 place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Childrens Services/CI L</td>
<td>2021</td>
<td>Infrastructur e Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED1</td>
<td>60 place pre-school (co-location with community space)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Childrens Services/CI L</td>
<td>2021</td>
<td>Infr Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CI L</td>
<td>2021</td>
<td>Infra Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
## Infrastructure Framework: Priority 2 Projects 2021-2026

### Education

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/Delivery body</th>
<th>Total Cost £m</th>
<th>Funding Sources</th>
<th>Estimated Delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>ED1</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CL</td>
<td>2021</td>
<td>Infr Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts Phase 1</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>13</td>
<td>Childrens Services/CL</td>
<td>2021</td>
<td>Infr Needs and Funding Study 2009</td>
</tr>
<tr>
<td>HC4</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority</td>
<td>2021</td>
<td>Infr Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED2</td>
<td>60 place pre-school</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>0.54</td>
<td>Childrens Services/CL</td>
<td>2026</td>
<td>Infrastructural Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CL</td>
<td>2026</td>
<td>Infrastructural Needs and Funding Study 2009</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in</td>
<td>Promoter/delivery body</td>
<td>Total cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
</tr>
<tr>
<td>-----</td>
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<td>---------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>ED2</td>
<td>2FE primary with integrated 60 place nursery</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>5.14</td>
<td>Childrens Services/CI</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>ED9</td>
<td>1400 secondary school with 280 sixth form places co-located with 4 x indoor sports courts phase 2</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Norfolk County Council</td>
<td>13</td>
<td>Childrens Services/CI</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>HC5</td>
<td>Primary Care Centre (5 GPs and 4 Dentists)</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Health Authority</td>
<td>3.35</td>
<td>Health Authority</td>
<td>2026</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
**Infrastructure Framework: Priority 3 projects**

The table below lists the Priority 3 infrastructure requirements to deliver the Joint Core Strategy. The 2 categories of infrastructure that are viewed as Priority 3 are Community facilities and Community services.

### Community facilities: 2013-2016

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF1</td>
<td>Community facilities 300 sq metres community space</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>0.54</td>
<td>Private companies / Developers / Local authorities/ CIL</td>
<td>2016</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>

### Community facilities: 2016-2021

<table>
<thead>
<tr>
<th>Ref</th>
<th>Scheme</th>
<th>Required for growth in</th>
<th>Promoter/delivery body</th>
<th>Total cost £m</th>
<th>Funding sources</th>
<th>Estimated delivery dates by</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>CF1</td>
<td>Community facilities 600 sq metres community space</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>1.44</td>
<td>Private companies / Developers / Local authorities/ CIL</td>
<td>2021</td>
<td>Infrastructure Needs and Funding Study 2009</td>
</tr>
<tr>
<td>Ref</td>
<td>Scheme</td>
<td>Required for growth in</td>
<td>Promoter/ delivery body</td>
<td>Total cost £m</td>
<td>Funding sources</td>
<td>Estimated delivery dates by</td>
<td>Source</td>
</tr>
<tr>
<td>-----</td>
<td>--------------------------------------------</td>
<td>-------------------------------------------------------------</td>
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<td>-------------------------------</td>
</tr>
<tr>
<td>CF 1</td>
<td>Community facilities 300sq metres of community space plus 4 indoor sports courts</td>
<td>Old Catton, Sprowston, Rackheath and Thorpe St. Andrew Growth Triangle</td>
<td>Broadland District Council</td>
<td>2.54</td>
<td>Private companies / Developers / Local authorities/ CIL</td>
<td>2026</td>
<td>Infrastructural Needs and Funding Study 2009</td>
</tr>
</tbody>
</table>
Appendix 8 – Monitoring framework

Spatial Planning Objective 1: To minimise the contributors to climate change and address its impact.

Policy: 1, 3, 5, 6, 7, 9, 10, 11, 12, 13, 14, 18, 19

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total CO$_2$ emissions per capita (LAA indicator NI 186, SA Indicator ENV6 &amp; local indicator 4.1)</td>
<td>Householders, business and transport</td>
<td>LAA target for GNDP area</td>
<td>DEFRA</td>
</tr>
<tr>
<td>Renewable energy capacity installed by type (CLG Core Output Indicator E3)</td>
<td>LA Environmental Services</td>
<td>Year on year percentage increase</td>
<td>LPA AMRs</td>
</tr>
<tr>
<td>Decentralised and renewable or low carbon energy sources installed in developments (Local)</td>
<td>LA Environmental Services</td>
<td>Year on year percentage increase</td>
<td>LPA AMRs</td>
</tr>
<tr>
<td>Number of planning permissions granted contrary to the advice of the Environment Agency on either flood defence grounds or water quality (CLG Core Output Indicator E1)</td>
<td>Environment Agency/LPAs</td>
<td>Zero</td>
<td>LPA AMRs</td>
</tr>
<tr>
<td>All new housing schemes to reach Code for Sustainable Homes level 4 for water on adoption and housing schemes of a minimum of 500 dwellings to reach level 6 for water by 2015</td>
<td>Developers / LPAs</td>
<td>All new housing schemes to reach Code for Sustainable Homes level 4 for water on adoption and housing schemes of a minimum of 500 dwellings to reach level 6 for water by 2015</td>
<td>LPAs / Building Control</td>
</tr>
<tr>
<td>Percentage of household waste that is reused recycled and composted (indicator NI 192 &amp; SA Indicator ENV9)</td>
<td>LAs</td>
<td>Year on year increase in total</td>
<td>LAs information published by DEFRA</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 2: To allocate enough land for housing, and affordable housing, in the most sustainable settlements.

Policy: 4, 9, 10, 11, 12, 13, 14, 15, 16, 17, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing supply (CLG Core Output indicators H.2 a-d)</td>
<td>LPAs &amp; Developers</td>
<td>Meet or exceed annual trajectory requirements</td>
<td>LPAs</td>
</tr>
<tr>
<td>Affordable housing completions (CLG Core Output Indicator H5)</td>
<td>LPAs, Housing Authorities, RSLs, Developers &amp; Homes and Communities Agency</td>
<td>33% of all developments on new allocations, or above qualifying threshold where permission is first granted after adoption of this strategy</td>
<td>LPAs</td>
</tr>
<tr>
<td>House completions by bedroom number, based on the proportions set out in the most recent Sub-regional Housing Market Assessment</td>
<td>LPAs, Housing Authorities, RSLs &amp; Developers</td>
<td>Figures within 10% tolerance of the Housing Market Assessment requirements</td>
<td>LPAs</td>
</tr>
<tr>
<td>Housing to meet the needs of older people, defined as a key group in the housing market assessment. Assessed by satisfaction of people over 65 With both home and neighbourhood (indicator N I 138)</td>
<td>Local authorities, RSLs, private developers</td>
<td>Increasing satisfaction recorded at successive biennial surveys</td>
<td>Audit Commission</td>
</tr>
<tr>
<td>Provision of Gypsy and Traveller pitches to meet the RSS review requirements</td>
<td>LPAs, RSLs</td>
<td>58 pitches between 2006 -2011 and future provision equivalent to a 3% annual growth by 2021</td>
<td>LPAs</td>
</tr>
<tr>
<td>NI 175 Access to services and facilities by public transport, walking and cycling similar to LTP1 indicator</td>
<td>Norfolk County Council</td>
<td>Increase at each survey</td>
<td>Norfolk County Council</td>
</tr>
<tr>
<td>Percentage of completions scoring good or very good in Building for Life criteria (CLG core output indicator H6)</td>
<td>LPAs, Developers, CABE</td>
<td>All approved after adoption to meet Code for Sustainable Homes level 4. All approved after 2015 to meet Code for Sustainable Homes level 6</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 3: To promote economic growth and diversity and provide a wide range of jobs To allocate enough land for housing, and affordable housing, in the most sustainable settlements.

Policy: 5, 6, 8, 10, 11, 12, 13, 14, 15, 16, 17, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of land developed for employment by type (CLG Core Output Indicator BD1)</td>
<td>LPAs, Developers</td>
<td>118ha B1 &amp; 111ha B2 / B8 2007 to 2026 (split into five year tranches)</td>
<td>LPAs</td>
</tr>
<tr>
<td>Annual count of jobs by ABI across the Plan area</td>
<td>Public &amp; private sector employers, Shaping Norfolk’s Future, EEDA</td>
<td>Measure against the annualised RSS figure (1,750/year)</td>
<td>NOMIS</td>
</tr>
<tr>
<td>New business registration rate (Indicator N. I. 171 –local indicator 1.4)</td>
<td>Public &amp; private sector employers, Shaping Norfolk’s Future, EEDA</td>
<td>Meet LAA target</td>
<td>ONS</td>
</tr>
<tr>
<td>The percentage of small businesses in the area showing employment growth (Indicator N I 172)</td>
<td>Public and private sector employers, Shaping Norfolk’s Future, EEDA</td>
<td>Meet Greater Norwich Economic Strategy target</td>
<td>ONS</td>
</tr>
<tr>
<td>Percentage of workforce employed in higher occupations (Managers and Senior Officials, Professional Occupations and Associate Professional and Technical Occupations)</td>
<td>Public and private sector employers, Shaping Norfolk’s Future, EEDA</td>
<td>Meet Greater Norwich Economic Strategy target</td>
<td>ONS</td>
</tr>
<tr>
<td>National retail ranking for Norwich (Local Indicator)</td>
<td>Shaping Norfolk’s Future, City Centre Management Partnership</td>
<td>Maintain national top 10 ranking</td>
<td>Average of current published indices [Experian Goad, CACI etc]</td>
</tr>
<tr>
<td>New retail development to be completed in line with JCS City Centre Policy</td>
<td>LPAs &amp; Developers</td>
<td>20,000 sq m comparison goods floorspace in the City Centre 2007 to 2016 (split into five year tranches)</td>
<td>LPAs</td>
</tr>
<tr>
<td>Indicator (&amp; type)</td>
<td>Main Agencies</td>
<td>Targets</td>
<td>Source</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Percentage of completed town centre uses in identified centres and strategic growth locations (Based on CLG Core Output Indicator BD4)</td>
<td>LPAs &amp; Developers</td>
<td>20,000 sq m comparison goods floorspace in the City Centre 2007 to 2016 (split into five year tranches)</td>
<td>LPAs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Office space to be completed 2007 to 2026:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 100,000 square metres in Norwich city centre</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 100,000 square metres Norwich Research Park</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 50,000 square metres Broadland Business Park</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 50,000 square metres elsewhere [derived from Arup report section 25.3]</td>
<td></td>
</tr>
</tbody>
</table>
### Spatial Planning Objective 4: To promote regeneration and reduce deprivation

**Policy:** 5, 6, 7, 9, 10, 11, 12, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of Super Output Areas in national most deprived 20%</td>
<td>LPAs</td>
<td>Reduction by 50% in plan period (28 out of 242 in 2007)</td>
<td>Index of Multiple deprivation</td>
</tr>
<tr>
<td>Percentage of previously developed land vacant for more than 5 years (NI 170)</td>
<td>Developers/LAs</td>
<td>Year on year reduction</td>
<td>CLG using information from HCA</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 5: To allow people to develop to their full potential by providing educational facilities to meet the needs of existing and future populations, while reducing the need to travel.

Policy: 7, 10, 11, 12, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>School leaver qualifications- % of school leavers with 5 or more GCSEs at A*-C grades including Maths and English (indicator N. I. a 75, local indicator 2.7 SA Indicator SOC3)</td>
<td>NCC Children’s Services</td>
<td>Year on year increase (on 2007 value of 53% in Greater Norwich)</td>
<td>Norfolk Insight</td>
</tr>
<tr>
<td>16 to 18 year olds who are not in education, training or employment (NEET), (indicator NI 117 – local indicator 2.3)</td>
<td>Learning &amp; Skills Council, Norfolk Connexions</td>
<td>Year on year reduction compared with 2006 value of 6%</td>
<td>Norfolk Insight</td>
</tr>
<tr>
<td>Proportion of the population aged 19 – 64 (male) and 19 – 59 (female) qualified to NVQ level 2 or higher (indicator NI 163 local indicator 1.2) (Norfolk wide)</td>
<td>Learning and Skills Council</td>
<td>As defined in local indicator</td>
<td>LAA</td>
</tr>
<tr>
<td>Proportion of the population aged 19 – 64 (male) and 19 – 59 (female) qualified to NVQ level 4 or higher (indicator NI 165) (Norfolk wide)</td>
<td>Learning &amp; Skills Council</td>
<td>Annual increase</td>
<td>Department for Innovation University and Skills</td>
</tr>
<tr>
<td>Achievement of at least 78 points across in the Early Years Foundation Stage, with at least 6 in each of the scales in Personal Social and Emotional Development and Communication, Language and Literacy (indicator N.I. 72, local indicator 2.4) (Norfolk Wide)</td>
<td>NCC Children’s Services</td>
<td>As defined in local indicator</td>
<td>DCSF based on County Council Returns</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 6: To make sure people have ready access to services.
Policy: 3, 6, 7, 9, 10, 11, 12, 13, 14, 15, 16, 17, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Retail development to be completed in line with JCS City Centre Policy</td>
<td>LPAs &amp; Developers</td>
<td>20,000 sq m comparison goods floorspace in the City Centre 2007 to 2016 (split into five year tranches)</td>
<td>LPAs</td>
</tr>
<tr>
<td>National retail ranking for Norwich (Local Indicator)</td>
<td>LPAs, City Centre Management Partnership</td>
<td>Maintain national top 10 ranking</td>
<td>Average of current published indices [Experian Goad, CACI etc] LPAs</td>
</tr>
<tr>
<td>Percentage of units vacant in defined primary shopping areas.</td>
<td>City Centre Management Partnership and local planning authorities</td>
<td>Not more than 5% vacant</td>
<td>Average of current published indices [Experian Goad, CACI etc] LPAs</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 7: To enhance transport provision to meet the needs of existing and future populations while reducing travel need and impact

Policy: 3, 6, 7, 9, 10, 12, 13, 14, 15, 16, 17, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to local services and facilities by public transport, walking and cycling (Indicator NI 175 and local transport plan indicator LTP 1)</td>
<td>Norfolk County Council</td>
<td>Year on year increase</td>
<td>Norfolk County Council</td>
</tr>
<tr>
<td>East of England sustainability checklist ‘Transport’ questions: (<a href="http://www.eastofenglandchecklist.co.uk/checklist/category/4">www.eastofenglandchecklist.co.uk/checklist/category/4</a>)</td>
<td>Developers</td>
<td>All developments of including more than 100 homes to demonstrate ‘good’ standards.</td>
<td>Developers / LPAs</td>
</tr>
<tr>
<td>Percentage of residents who travel to work by foot or cycle in Norwich Policy Area (Part of SA Indicator SOC8)</td>
<td>Norfolk County Council</td>
<td>Year on year increase (new baseline to be established)</td>
<td>Norfolk County Council</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 8: To positively protect and enhance the individual character and culture of the area.

Policy: 2, 5, 7, 8, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of previously developed land vacant for more than 5 years (NI 170)</td>
<td>Developers/LAs</td>
<td>Year on year reduction</td>
<td>CLG</td>
</tr>
<tr>
<td>Percentage of Conservation areas with Appraisals</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
<tr>
<td>New residential developments of 10 or more units achieving silver standard against Building for Life criteria</td>
<td>LPAs</td>
<td>100%</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 9: To protect, manage and enhance the natural, built and historic environment, including key landscapes, natural resources and areas of natural habitat or nature conservation value.

Policy: 1, 3, 5, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in areas of local biodiversity importance</td>
<td>Norfolk Biodiversity Partnership</td>
<td>Year on year improvements</td>
<td>LPAs AMRs</td>
</tr>
<tr>
<td>(CLG Core Output Indicator E2, indicator NI 197)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of river lengths assessed as</td>
<td>Environment Agency</td>
<td>Above the national standard of 95% 'good'</td>
<td>Environment Agency</td>
</tr>
<tr>
<td>a) good biological quality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) good chemical quality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(SA Indicator ENV2)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of designated Air Quality Management Areas (AQMAs) (SA Indicator ENV3)</td>
<td>LA Environmental Services</td>
<td>No AQMAs</td>
<td>Las / DEFRA</td>
</tr>
<tr>
<td>Percentage of SSSIs in:</td>
<td>Natural England</td>
<td>95% of SSSIs in 'favourable' or 'unfavourable recovering' condition</td>
<td>Natural England</td>
</tr>
<tr>
<td>a) favourable condition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) unfavourable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) unfavourable no change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) unfavourable changing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) destroyed/ part destroyed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(CLG Core Output Indicator E.2, SA Indicator ENV4)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of listed Buildings lost / demolished</td>
<td>LPAs</td>
<td>zero</td>
<td>LPAs</td>
</tr>
<tr>
<td>Number of Tree Preservation Orders (TPOs) where trees are lost though development (based on SA Indicator ENV5)</td>
<td>LPAs</td>
<td>zero</td>
<td>LPAs</td>
</tr>
<tr>
<td>Percentage of new and converted dwellings on Previously Developed Land</td>
<td>LPAs &amp; Developers</td>
<td>25%</td>
<td>LPA AMRs</td>
</tr>
<tr>
<td>(CLG Core Output Indicator H.3)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indicator (&amp; type)</td>
<td>Main Agencies</td>
<td>Targets</td>
<td>Source</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>---------------------------------------</td>
<td>-----------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Dealing with local concerns about anti-social behaviour and crime by the local council and police (NI 21, local indicator 6.3)</td>
<td>Local community safety partnerships</td>
<td>Year on year increase in satisfaction</td>
<td>Audit Commission</td>
</tr>
<tr>
<td>Reduction in overall crime (Local Indicator 6.11)</td>
<td>Local community safety partnerships</td>
<td>Year on year decrease target set by LAA</td>
<td>Local Area Agreement</td>
</tr>
<tr>
<td>Road Safety: Number of people killed or seriously injured in road traffic accidents (NI 47, local indicator 6.6)</td>
<td>Norfolk County Council</td>
<td>GNDP-wide targets: 2008 – 187 2009 – 178 2010 – 160 (expressed as a three year rolling average)</td>
<td>Department for Transport</td>
</tr>
<tr>
<td>Improving community pride: Civic participation in the local area (NI 3)</td>
<td>LAA (information to be collected every 2 years, by survey)</td>
<td>Increased percentage at each survey</td>
<td>Audit Commission</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 11: To encourage the development of healthy and active lifestyles
Policy: 2, 6, 10, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of the population receiving Incapacity Benefit (SA Indicator SOC2)</td>
<td>Primary Care Trust</td>
<td>No increase on 2007 level of 6.6% in spite of predicted ageing population</td>
<td>Norfolk Insight</td>
</tr>
<tr>
<td>Healthy life expectancy at age 65 (NI 137)</td>
<td>Local authorities for the LAA</td>
<td>Increase at each survey</td>
<td>Audit Commission</td>
</tr>
<tr>
<td>Access to services and facilities by public transport, walking and cycling similar to LTP1 indicator (NI 175)</td>
<td>Norfolk County Council</td>
<td>Increase at each survey</td>
<td>Norfolk County Council</td>
</tr>
<tr>
<td>Accessibility of leisure and recreation facilities based on Sport England Active Places Power website (Local indicator)</td>
<td>Norfolk County Council, Sport England, Local Authorities &amp; Service Providers</td>
<td>Trajectory to reduce by half the percentage of wards with less than the East of England Average Personal share of access to Sports Halls (2009 base = 67%) swimming pools (65%) and indoor bowls (12%)</td>
<td>Active Places Power website</td>
</tr>
</tbody>
</table>
### Spatial Planning Objective 12: To involve as many people as possible in new planning policy

**Policy**: 10, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement of Community Involvement / Engagement</td>
<td>LPAs &amp; Developers</td>
<td>Statement of compliance accepted</td>
<td>LPAs’ Annual Monitoring reports</td>
</tr>
<tr>
<td>Recognised participatory design process for major growth locations</td>
<td>LPAs &amp; Developers</td>
<td>Used for all major growth locations – over 500 dwellings</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Appendix 8a – Additional monitoring framework for the Broadland part of the Norwich Policy Area

Spatial Planning Objective 1: To minimise the contributors to climate change and address its impact.
Policy: 1, 3, 5, 6, 7, 9, 10, 11, 12, 13, 14, 18, 19

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
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<tbody>
<tr>
<td>Percentage of residents who travel to work: a) by private motor vehicle; b) by public transport; c) by foot or cycle; and d) work at, or mainly at, home.</td>
<td>Norfolk County Council / Developers / LPAs</td>
<td>Decrease in a) and increase in b), c) and d) over plan period</td>
<td>ONS (Census)</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 2: To allocate enough land for housing, and affordable housing, in the most sustainable settlements.
Policy: 4, 9, 10, 11, 12, 13, 14, 15, 16, 17, 19, 20, 21, 22

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing land supply within Broadland part of the NPA</td>
<td>LPAs/Developers</td>
<td>To have more than 90% of the required deliverable housing land (as defined in current national policy) in the rolling 5-year supply of housing land (plus the ‘additional buffer’ required in current national policy).</td>
<td>LPAs</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 4: To promote regeneration and reduce deprivation
Policy: 5, 6, 7, 9, 10, 11, 12, 19, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unfit housing – percentage of overall housing stock not meeting “Decent Homes Standard”</td>
<td>LAs</td>
<td>Decrease over plan period</td>
<td>LAs</td>
</tr>
</tbody>
</table>
Spatial Planning Objective 7: To enhance transport provision to meet the needs of existing and future populations while reducing travel need and impact

Policy: 3, 6, 7, 9, 10, 12, 13, 14, 15, 16, 17, 19, 20

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</tr>
</tbody>
</table>

Spatial Planning Objective 8: To positively protect and enhance the individual character and culture of the area.

Policy: 2, 5, 7, 8, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
<tr>
<th>Indicator (&amp; type)</th>
<th>Main Agencies</th>
<th>Targets</th>
<th>Source</th>
</tr>
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<tbody>
<tr>
<td>Heritage at risk – number and percentage of: a) Listed Buildings; and b) Scheduled Ancient Monuments on Buildings at Risk Register</td>
<td>LPAs</td>
<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
</tbody>
</table>

Spatial Planning Objective 9: To protect, manage and enhance the natural, built and historic environment, including key landscapes, natural resources and areas of natural habitat or nature conservation value.

Policy: 1, 3, 5, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20

<table>
<thead>
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<td>Year on year reduction</td>
<td>LPAs</td>
</tr>
</tbody>
</table>
Appendix 9: Glossary

Accessible
In the case of community facilities and services (such as healthcare), easy to travel to or use. In reference to buildings or public transport, easy to enter and use by all.

Affordable housing
Housing provided for sale, rent or shared equity at prices in perpetuity below the current market rate, which people in housing need are able to afford.

Allocated
Land which has been identified for a specific use in the current Development Plan.

Appropriate Assessment
Analysis of the impact of plans and strategies on areas of designated European environmental importance such as Special Protection Areas, Special Areas of Conservation and Ramsar sites.

Area Action Plan (AAP)
A Development Plan Document within the Local Development Framework that establishes a set of development proposals and policies for a specific area.

Biodiversity
The variety of different types of plant and animal life in a particular region.

Brownfield land, brownfield site
Land or site that has been subject to previous development.

Built environment
The man-made surroundings that provide the setting for human activity, ranging in scale from personal shelter to neighbourhoods to the large-scale civic surroundings.

Bus Rapid Transit (BRT)
Bus-based public transport service providing more frequent and faster services than an ordinary bus route, achieved by making improvements to existing infrastructure, vehicles and scheduling.

Business use
Land use class covering light industry, offices, research and development.

Cittaslow
Literally meaning ‘slow town’, Cittaslow status is granted to towns meeting a number of assessment criteria. These towns show commitment to working towards a set of goals aimed at improving the quality of life for those people who live and work in, or visit the town, while resisting the fast-lane and the ‘sameness’ that afflicts other towns and cities.

City centre
The main commercial area of Norwich as set out on the city centre key diagram.

City region
A term used to describe not just the administrative area of a city but the area surrounding it which is economically, socially and culturally dependant on the city.

Commitments
Development proposals which already have planning permission or are allocated in adopted development plans.

Community facilities
Services that meet the day-to-day needs of a community such as village halls, post offices, doctors’ and dentists’ surgeries, recycling facilities, libraries and places of worship.
Comparison goods
Household or personal items which are more expensive and are usually purchased after comparing alternative models/types/styles and price of the item (e.g. clothes, furniture, electrical appliances). Such goods generally are used for some time.

Conservation area
Area of special historic and/or architectural interest which is designated by the Local Planning Authority as being important to conserve and enhance. Special planning controls apply within these areas.

Convenience goods
Items bought for everyday needs, including food and other groceries, newspapers, drink and tobacco and chemist’s goods. Generally such goods are used or consumed over a relatively short period.

Core Bus Routes
A network of main bus routes where service frequency and bus priority will be enhanced.

Core Strategy
A spatial planning strategy that sets out long term objectives for planning.

County wildlife site
Wildlife habitat identified and designated as being of particular local interest of importance by Norfolk County Council and the Norfolk Wildlife Trust but which is not of sufficient national merit to be declared as a Site of Special Scientific Interest.

Decentralised and renewable or low-carbon energy sources
Sources of energy that are renewable or low-carbon (or a combination of these) and locally based (on-site or near-site, but not remote off-site), usually on a relatively small scale. Decentralised energy is a broad term used to denote a diverse range of technologies, including micro-renewables, which can locally serve an individual building, development or wider community and includes heating and cooling energy.

Development
Defined in planning law as ‘the carrying out of building, engineering, mining or other operations in, on, over, or under land, or the making of a material change of use of any building or land’.

Development Plan
A set of plans guiding future development in the area. The development plan consists of the Regional Spatial Strategy and locally prepared Development Plan Documents.

Development Plan Document
Locally prepared document on a specific topic which forms part of the development plan and which subject to independent examination before adoption. Also commonly referred to as DPDs.

Development brief
A document describing and leading the form and layout of development in a prescribed area.

District shopping centre
A group of shops, containing at least one supermarket or superstore and other services, providing for a catchment extending beyond the immediate locality.

East of England Development Agency (EEDA)
Government agency created in April 1999 to help further economic regeneration and prosperity in eastern England (Norfolk, Suffolk, Cambridgeshire, Hertfordshire, Bedfordshire and Essex).

East of England Plan (EEP)

Employment use
Use primarily for industrial, warehousing, office or other business uses falling within classes b1, b2 and b8 of the use classes order.
Environmental statement
Written statement, submitted with certain kinds of planning application, which set out the anticipated effects of the proposed development. Such statements deal with the full environment effects of major development proposals and include any mitigation measures needed under the Town and Country Planning (environmental impact) Regulations 1999.

Exception site
A small site to be used specifically for affordable housing that would not normally be used for housing, because they are subject to policies of restraint. Exception sites should only be used for affordable housing in perpetuity (PPS3).

Geodiversity
The variety of different types of geology, landforms, soils and physical processes in a particular region.

Greenfield land (or site)
Land which has not previously been built on, including land in use for agriculture or forestry. Does not include residential garden land.

Green infrastructure
Green spaces and interconnecting green corridors in urban areas, the countryside in and around towns and rural settlements, and in the wider countryside. It includes natural green spaces colonised by plants and animals and dominated by natural processes and man-made managed green spaces such as areas used for outdoor sport and recreation including public and private open space, allotments, urban parks and designed historic landscapes as well as their many interconnections like footpaths, cycleways, green corridors and waterways.

Grey water
Any water that has been used in the home (except water from toilets). Dish, shower, sink and laundry water comprises 50-80% of residential waste water which can be reused for other purposes.

Growth Point Status
Growth Points is a Government initiative designed to provide support to local communities who wish to pursue large-scale and sustainable growth, including new housing. Growth Point status is not a statutory designation but a relationship between central government and local partners offering funding opportunities and support in the early delivery of housing, sustainable growth, infrastructure and service provision and effective delivery.

Health Impact Assessment
An assessment to judge whether development proposals may have an impact on health or health inequality in terms of its effects on health and social care services, or wider lifestyle related considerations or factors such as crime, social cohesion, movement or air pollution, for example.

Homezone
Streets where people and vehicles share the road space safely and on equal terms with quality of life taking precedence over ease of traffic movement.

Ideopolis: Knowledge Cities Enabling Norwich in the Knowledge City
A report prepared by the Work Foundation that assesses the strengths and weaknesses of Norwich in the changing economy and sets out a potential vision for Norwich’s future as well as recommendations for how to get there.

Index of Multiple Deprivation
A ward-level index made up from six indicators (income; employment; health deprivation and disability; education; skills and training; housing; and geographical access to services).

Infill development
Small-scale development filling a gap within an otherwise built up area.
Infrastructure
The network of services to which it is usual for most buildings or activities to be connected. It includes physical services serving the particular development (e.g. gas, electricity and water supply; telephones, sewerage) and also includes networks of roads, public transport routes, footpaths etc as well as community facilities and green infrastructure.

Knowledge economy
The production, distribution, and use of knowledge as the main driver of growth, wealth creation, and employment across all industries. It does not rely solely on a few advanced-technology industries but is applicable to traditional industries, such as mining and agriculture.

Life Sciences
Any of several branches of science, such as biology, medicine, anthropology, or ecology, that deals with living organisms and their organisation, life processes, and relationships to each other and their environment.

Local Area Agreement (LAA)
A three year contract between the Local Authority, Local Strategic Partnership and Central Government to deliver priorities in its Sustainable Community Strategy.

Local Development Framework (LDF)
The Local Development Framework (LDF) is the term used to describe the set of documents which will eventually include all of the planning authority's local development documents, one of which will be the Core Strategy.

Local nature reserve
Area of botanical or wildlife interest where access and use by local people is encouraged through designation by the local authority.

Local shopping centre
A group of shops or services forming a centre of purely local significance.
See city centre, district shopping centre and commercial area.

Local Strategic Partnership (LSP)
A Local Strategic Partnership is a partnership which brings together organisations from public, private, community and voluntary sectors in a local authority area with the key objective of improving the quality of life in that area. Because an LSP is locally based the community are well placed to influence its decision making.

Local Transport Plan
A five-year integrated transport strategy, prepared by local authorities in partnership with the community, seeking funding to help provide local transport projects. The plan sets out the resources predicted for delivery of the targets identified in the strategy.

Low carbon
To minimise carbon dioxide emissions from a human activity.

Mode hierarchy
Principle of assigning priority, for planning purposes, to different modes (or means) of transport.

Northern Distributor Road (NDR)
A dual-carriageway road proposed to the north of Norwich, linking the A47 to the south-east of the city with the A1067 in the north-west.

Norwich Area Transportation Strategy (NATS)
Statement of strategic transportation policy for Norwich and surrounding area, most recently adopted in 2004.

Norwich fringe
Area next to the city of Norwich, but lying in another administrative district which is predominantly developed, including open spaces encompassed within the developed area. For Broadland this includes the continuously built up parts of Hellesdon, Drayton, Taverham, Old Catton, Sprowston and Thorpe St Andrew and in South Norfolk it includes Colney, Costessey, Crippleford and Trowse.
**Norwich Policy Area**
Part of the county which is centred on and strongly influenced by the presence of Norwich as a centre for employment, shopping and entertainment, generally comprising the fringe and first ring of large villages around the city of Norwich, but extending to Long Stratton and Wymondham (see Appendix 4).

**Park and ride**
Provision of parking areas at the edge of the built up area and linked by frequent bus (or other public transport) services to the city centre.

**Planning obligations**
Legal agreements between a planning authority and a developer, or undertakings offered unilaterally by a developer to ensure that specific works are carried out, payments made or other actions undertaken which would otherwise be outside the scope of the planning permission. Often called Section 106 obligations. The term legal agreements may embrace S106.

**Previously developed land**
See Brownfield land.

**Protected species**
Any species which, because of its rarity or threatened status is protected by statutory legislation (The Wildlife and Countryside Act 1981 (as amended) and the Conservation (Natural Habitats etc) Regulations 1994).

**Public rights of way**
Public footpaths and bridleways as defined in the Countryside and Rights of Way Act 2000 and permissive routes where there is no legal right of way but access is permitted by the landowner.

**Ramsar site**
A European designation that protects areas of wetland.

**Regional Spatial Strategy (RSS)**
Broad strategy setting out spatial planning policies for a region. It forms part of the development plan for the area along with locally prepared Development Plan Documents, which must be in general conformity with it. The Regional Spatial Strategy for this part of England is called the East of England Plan.

**Renewable energy**
Energy generated from sources which are non-finite or can be replenished. Includes solar power, wind energy, power generated from waste, biomass etc.

**Retail assessment/retail impact assessment**
An assessment which may be required in connection with major retail proposals assessing their likely effect on patterns of trade and the viability and vitality of existing retail centres.

**Rights of way**
In this context, rights of way means public footpath and bridleways as defined in the Countryside and Rights of Way Act 2000. The phrase ‘rights of way’ include the above and permissive routes where there is no legal right of way but access is permitted by the landowner.

**Scheduled ancient monument**
Ancient structure, usually unoccupied, above or below the ground, which is preserved by order of the secretary of state. Works affecting an ancient monument must be approved by the Secretary of State.

**Settlement Hierarchy**
A way of arranging settlements into a hierarchy based upon a number of criteria, such as population and services offered.

**Settlement limit**
These are areas where development appropriate to the settlement in question will usually be permitted. Sometimes called village envelopes or development boundaries.
Shared equity
Arrangement whereby home buyers may pay only part of the initial cost of buying their home to acquire a share in it, but pay rent on the remaining part to the seller (usually a registered social landlord) sometimes with an option to purchase the remaining part later.

Site allocation DPD
A document used to identify sites to accommodate the range of land uses necessary to implement the objectives of a Core Strategy.

Site of Special Scientific Interest (SSSI)
Site or area designated as being of national importance because of its wildlife, plants or flower species and/or unusual or typical geological features. SSSIs are identified by Natural England and have protected status under the Wildlife and Countryside Act 1981.

Spatial portrait
This provides the context for the Local Development Framework as a whole and is the starting point for the Core Strategy. It describes the area in question, how it functions and highlights the key issues to be addressed.

Special Area of Conservation (SAC)
Special Areas of Conservation are defined in the European Union’s Habitats Directive (92/43/EEC), also known as the Directive on the Conservation of Natural Habitats and of Wild Fauna and Flora. They are defined to protect the 220 habitats and approximately 1,000 species listed in Annex I and II of the directive which are considered to be of European interest following criteria given in the Directive.

Special Protection Areas (SPAs)
Special Protection Areas are strictly protected sites classified in accordance with Article 4 of the EC Birds Directive, which came into force in April 1979. They are classified for rare and vulnerable birds (as listed on Annex I of the Directive), and for regularly occurring migratory species.

Street furniture
Collective term for permanent structures installed within the highway, including footways and pedestrian areas. Includes street lighting columns, signs, seats, litter bins, telephone kiosks, post boxes etc.

Supplementary Planning Document (SPD)
Guidance published by the local planning authorities to provide further detailed information on how local plan policies are to be applied or interpreted. SPD may be prepared jointly, particularly where a consistent policy approach is required over an area covered by more than one local planning authority. SPD may be concerned with a particular issue, or it may give more detailed guidance of the development of a specific site, covering a whole range of issues. This is frequently referred to as a development brief.

Sustainability Appraisal (SA)
An appraisal of the economic, environmental and social effects of a plan from the outset of the preparation process to allow decisions to be made that accord with sustainable development.

Sustainable development
The main dimensions of sustainable development as identified in the UK’s strategy for sustainable development (‘a better quality of life, a strategy for sustainable development’ 1999) are as follows:

- social progress which recognises the needs of everybody
- effective protection of the environment
- prudent use of natural resources
- the maintenance of high and stable levels of economic growth and employment

Sustainable drainage system
Efficient drainage system which seeks to minimise wastage of water, including the use of appropriate groundcover to enable maximum penetration of clean water run-off into the ground and, where appropriate, recycling grey water within the development. Designed to minimise the impact of development on the natural water environment.
Tertiary education
Tertiary education is the educational level following the completion of secondary education and includes further, as well as higher, education.

Transport assessment
An assessment, that may be required in connection with major development proposals, which looks at how people are likely to access the development and its effects on travel patterns. It will also look at how any undesirable consequences can be mitigated. It should consider how access on foot, by cycle or public transport can be promoted and how the demand for car parking can be minimised.

Urban Heat Island
An urban heat island is an effect that can lead to a built-up area being significantly warmer than the countryside surrounding it. The main cause of the urban heat island is modification of the land surface by urban development.

Use classes order
The Town and Country Planning (Use Classes) Order, 1987, a statutory order made under planning legislation, which groups land uses into different categories (called use classes). Change of within a use class and some changes between classes do not require planning permission.

Windfall site
Site where planning permission for housing development is granted during the plan period but which is not identified in the plan for housing development.
For more information or if you require this document in another format or language, please phone:

01603 431133
for Broadland District Council

0344 980 3333
for Norwich City Council

0808 168 3000
for South Norfolk Council

Joint Core Strategy for Broadland, Norwich and South Norfolk
Adopted March 2011, as amended and adopted January 2014
Monitoring Officer Report

Compliance and Risk Manager

The purpose of this report is to inform Council of proposed changes to the structure of Saffron Housing Trust, and to obtain Council consent to both the revised Scheme of Delegation for the Development Management Committee, and a formal structure for Committee Accreditations.

Cabinet member(s): John Fuller
Ward(s) affected: All
Contact Officer, telephone number, and e-mail: Leah Mickleborough 01508 533954 lmickleborough@s-norfolk.gov.uk

1. **Saffron Housing Trust**

*Background*

1.1. In 2004, South Norfolk Council transferred its housing stock to South Norfolk Housing Partnership (subsequently renamed Saffron Housing Trust) with the intention that Saffron would undertake significant improvements to the Council’s housing stock and act as a key future provider of housing in the District.

1.2. The initial support provided by South Norfolk Council was high, but rapidly reduced with Saffron successfully taking over its administrative and operational functions, and delivering strong positive outcomes against the list of promises made at the time of transfer.

1.3. As Saffron has grown, so the District Council’s role in the management of Saffron has steadily reduced. In 2008, the Council agreed to amendments to Saffron’s governance documents which reduced the number of Board members appointed by South Norfolk Council from 4 to 2, effectively ending the Council’s power to veto decisions made by Saffron. These arrangements have generally operated well, and Saffron have been a key part of the Council’s success in delivering affordable homes across the District.

*Current Position*

1.4. The Board of Saffron Housing Trust now feel that it is time to move forward in its next stage of evolution. Saffron need to be in a position where they can act as a lead player in the social housing market, at a time when the market is seeking to consolidate. This is clearly in the interests of South Norfolk as a whole. Saffron hold nearly 10% of the total housing stock in the District, and provide significant
employment opportunities. Retaining and growing this critical mass within the District will help deliver further opportunities and maximise potential benefits to our residents.

1.5. A key part of the evolution of Saffron is the proposal to form an Industrial and Provident Society (IPS). In principle, there would be limited difference between the IPS structure and the present structure (a company also registered as a Charity). Saffron would be classified as an “exempt charity” and benefit from the same taxation reliefs. In the unlikely event that Saffron was to experience difficulties, the assets would be protected and transferred to another organisation with similar community-based objectives (i.e. another housing association). Many other Housing Associations have already transferred to the IPS structure.

1.6. The switch would lead to 2 key potential benefits to Saffron:

- Reduction in administrative burden – at present, Saffron is regulated by both the Charity Commission and the Homes and Community Agency (HCA). As an IPS, they would only be regulated by the HCA. The HCA regulations are better designed to meet the needs of Housing Associations and thus offer greater flexibility and understanding of Saffron’s operations.

- Facilitation of funding – Private financers of companies usually expect to levy charges over the assets of the company, that lenders to IPS do not typically undertake. Saffron understand there is better knowledge across the market on lending to IPS than Housing Associations that operate as a charity, and as such there may be greater funding opportunities should Saffron wish to expand.

Changes to Board membership

1.7. Alongside the structural changes, Saffron have indicated they wish to move towards a skills-based Board. Without diminishing the role that elected members have played on the Saffron board, this move would be eminently sensible in ensuring the Saffron Board have a strong cross-section of skills and aptitudes to drive the organisation forward. This would potentially mean a change in District Council representation, although Saffron have indicated a phased approach would be employed to the reduction in District Council involvement, and a key element of future Board member skills will be knowledge / experience of a local authority environment. Saffron have committed to working with the Council to clarify requirements.

1.8. Saffron has sought to minimise impacts and risks to South Norfolk Council as a result of the changes in the membership. In particular, a key element of future Board member skills will be knowledge / experience of a local authority environment. Saffron has committed to discussing the exact wording of this requirement with the Council, and the Council could still make suggestions regarding potentially suitable nominees.

1.9. Under the terms of the LSVT agreement, the Council can only object to changes that affect Saffron’s Board or Company Membership – and similarly, only object where it has reasonable grounds for doing so. At present, when balancing the potential benefits of the changes to Saffron as a result of the IPS structure,
officers and the Council’s representatives on Saffron’s Board are proposing that these changes are supported although a further update will be provided to Council in February should this position need to be reconsidered.

Other Impacts

1.10. At this stage, Officers are currently working alongside Saffron to assess the potential impacts on the District Council, with an emphasis on ensuring the effective practices that have formed between South Norfolk Council and Saffron continue and develop further, for example assessing the position regarding the VAT shelter which allows the District Council a reimbursement of VAT on selective qualifying works to be distributed, where possible, towards funding social housing development.

2. Scheme of Delegation for Development Management

2.1. In October, Cabinet recommended to Council a revised scheme of delegation for development management to apply from 1 January 2014. Council is now being requested to approve the scheme, which is attached at Appendix 1.

2.2. In recommending the Scheme, Cabinet requested that applications which had the potential to generate employment but had been recommended for refusal be referred to committee – this has now been added to the revised scheme. Officers were also requested to review the reference to “significant applications where the comments from the Parish Council are contrary to the recommendation” (see p.56 of the Cabinet agenda for 28 October 2013). This has now been revised, in that decisions may be referred to the Committee where the Parish Council raises material planning objections to the application.

2.3. Officers will attend the Parish Clerk briefing on 28 November 2013 in order to communicate the proposals to Parish Clerks and ensure they are informed of the forthcoming changes. A member briefing session will be held on Thursday, 12 December at midday, following the Directorate Plan Workshop.

3. Accreditations

3.1. South Norfolk Council was believed to be one of the first Councils in the Country to adopt a system whereby members making decisions on the Development Management and Licensing Committees were required to be accredited. This system helps to uphold a high quality of decision making across the Council, encourage public confidence in the Council’s decision making and reduce the risk of potential challenge to Committee decisions.

3.2. The Constitution does not currently reflect what “accreditation” is required or expected of members, although the Council presently operates so that a member must have attended a relevant session within the previous 12 months of the date of the Committee.

3.3. It is now proposed to introduce a formal framework into the “members roles and responsibilities” section of the Constitution, as attached at Appendix 2. This framework should help to avoid any confusion, and whilst it is largely formalising the present process, an important new addition is a Professional Qualification
Exemption, which recognises that members may already hold professional qualifications in a certain field which could remove the need for that member to attend Council organised events.

4. **Neighbourhood Plan Referenda**

4.1. The Council is required to appoint a proper officer for the purpose of oversight of the administration of Neighbourhood Plan referendums. This is a different role to the Counting Officer, who oversees the conduct of the election and is, by statute, the Council’s Returning Officer. Given the role is primarily administrative in nature, it is proposed that the Monitoring Officer is appointed as the proper officer for this purpose.

5. **Implications**

5.1. There are no direct financial / equalities / crime and disorder implications arising from this report.

6. **Recommendations**

6.1. Council is requested to:

   6.1.1. Provide its support in principle to the changes proposed to the Board of Saffron Housing Trust

   6.1.2. Agree the revised Scheme of Delegation for Development Management as attached at Appendix 1 to apply from 1 January 2014;

   6.1.3. Agree the inclusion of the “Committee Accreditation” section in part 5.5 of the Constitution, Members Roles and Responsibilities, as attached at Appendix 2

   6.1.4. Appoint the Monitoring Officer as the Proper Officer for Neighbourhood Plan Referenda
Report of the Leader of the Council

This report covers the items discussed at the 28 October 2013 Cabinet meeting. A verbal update will be given on the Cabinet meeting held on 2 December 2013.

Cabinet member(s): Ward(s) affected:
Cllr John Fuller All

Contact Officer, telephone number, and e-mail:
Sandra Dinneen 01508 533603 sdinneen@s-norfolk.gov.uk

1. Performance and Risk Report Quarter 2

1.1. We considered the report detailing delivery against performance targets, financial performance and management of risks from April to September 2013. We welcomed the overall performance which confirms we are still delivering services to our residents with consistently high performance, ensuring value for money and quality services.

2. Revenue Budget Report April to September 2013

2.1. We considered the revenue budget performance report which, so far, shows a positive variance for the half of the year, owing to effective management of both the pay and non pay budgets. Income has exceeded forecasts, which has also contributed to the positive variance. We also welcomed the report that the audit of the Annual Accounts for 2012/13 had been completed and an unqualified opinion had been given.

3. Capital and Treasury Report Quarter 2

3.1. We considered the combined capital and treasury report, which detailed the capital expenditure for April to September 2013 and also reviewed the treasury
management activity in that period. We agreed the current approach of relatively short-term investments should continue in light of the current economic situation and we agreed that an alternate bank account should be set up for contingency purposes in view of the situation with the Co-operative Bank.

3.2. Elsewhere on this agenda is our recommendation to Council on key issues in relation to the treasury report.

4. **Business Rates Pooling**

4.1. We considered the potential for establishing a business rates pooling arrangement with Norfolk County Council and other district councils. After weighing the pros and cons, we agreed to recommend to this Council that we look to enter this Council into a business rates pooling arrangement with other Norfolk councils.

5. **Development Management – Proposed Revised Scheme of Delegation**

5.1. A recent review in Development Management has led to a number of changes to ensure better performance and ensuring resources are focused on the key priorities. As part of that review, we agreed to recommend to Council that a revised scheme of delegation be approved, subject to how the changes might be communicated to members and parish and town councils.

6. **Risk Management Strategy**

6.1. The Council’s Risk Management Strategy has been reviewed and we agreed the revised strategy, which takes account of the cultural move towards taking risks in a measured manner.

7. **Whistleblowing Policy and Counter Fraud, Corruption and Bribery Strategy**

7.1. We agreed the revised strategies which have been updated in line with best practice and which provide a clear pathway for any staff or member to raise any concerns they might have.

8. **Your Neighbourhood, Your Choice - Year Two Proposals**

8.1. We agreed some of the proposals as outlined in the report, but felt that the remaining proposals would benefit from further discussion, and an informal meeting of members would be convened to discuss these.

9. **Ayton Road, Wymondham – Surrender and Grant of Commercial Ground Lease**
9.1 We agreed to approve the lease as outlined in paragraph 3 of the report in respect of the ground lease at Ayton Road.

John Fuller
Leader
Report of the Scrutiny Committee Chairman

This report is to update members on the work of the Scrutiny since the last Council meeting on 23 September 2013.

Cabinet member(s): All
Ward(s) affected: All

Contact Officer, telephone number, and e-mail:
Emma Nangle 01508 533747 enangle@s-norfolk.gov.uk

1. Scrutiny Committee – 25 September 2013

1.1. The Committee considered a number of reports at its meeting on 25 September; the financial return on the Council’s investment properties, a review of localism delivery in South Norfolk, the annual performance data and a review of the implementation of welfare reforms in the first six months.

1.2. The investment property report had been prepared in response to members’ concerns about the way in which information concerning the Council’s investment property portfolio was presented to Cabinet. Members were reminded of the different approach the Council had in respect of its cash investments compared to property investments, where priorities around property investment were the return on the investment and the capital value in the longer term – but with cash investments the priorities were security, cash-flow and then returns. The Scrutiny Committee concluded by recommending that the revised format for presenting information, as provided at appendix 1 of the report, be used when reporting property returns going forward to aid understanding of the true return generated by the portfolio, with the inclusion of additional information concerning insurance and acquisition costs for each property.

1.3. Members also considered a report that informed them of the current position following the first year pilot of Your Neighbourhood, Your Choice (YNYC). The Committee was advised that officers and members had found the experience to be very positive with much learnt throughout the process. The Committee was reminded that following the peer review the Council had been recognised nationally for its innovative, bold and ambitious approach to the delivery of localism to the people of South Norfolk. Members were reminded that the success of the scheme was the responsibility of all members and they should talk to local people and community groups and be the ‘eyes and ears’ in their community. Members were in agreement that the key to the success of localism delivery was to strengthen both member and community engagement. The Committee endorsed the Council’s approach to localism, recommended that financial and performance figures relating to the delivery of localism be presented to the Growth and
Localism Committee periodically and that all members and staff should be encouraged to participate in localism delivery and information be communicated more widely to all members.

1.4. In relation to performance statistics, members were pleased to note that there was only one red indicator, which related to staff sickness. The Business Improvement Manager confirmed that the Council had ‘benchmarked’ the Council’s sickness statistics against that of other local authorities. Members were advised that the Staff Forum was encouraged to take the lead on initiatives to improve the health and wellbeing of the Council’s staff. Further, sickness figures were linked to individual staff members’ Performance Reviews and fed into the yearly Directorate Plans. Members noted the performance reported for 2012/13

1.5. Finally, the Revenues and Benefits Manager and the Housing and Public Health Manager presented members with an overview of the impact of the implementation of welfare reforms on residents after the first six months. The Committee was advised that overall the majority of residents in the District were coping well, with only relatively small numbers of households being affected to any significant degree. The Council’s Revenues and Benefits team was working proactively with a focus on preventing problems before they arose, liaising with outside agencies such as social landlords and Job Centre Plus to intervene early in cases of the most vulnerable families. The Committee noted the work done by the Council to support residents in the District and the plans to strengthen this work further and also requested that a further update regarding preventative work and Universal Credit be brought to a future meeting.

2. Scrutiny Committee – 13 November 2013

2.1. The Scrutiny Committee meeting held on 13 November considered three reviews; Policy Committees, engagement and marketing and npLaw.

2.2. The Compliance and Risk Manager presented the item regarding the Council’s Policy Committees, which requested that members reviewed and assessed the effectiveness of the Committees. The Committee received evidence from three of the Chairman of the Committees. Members were advised that through the policy committee structure officers were now able to bring issues to members much earlier in the decision-making process, enabling input from members long before formal reports were being prepared for Cabinet. The Committee discussed the formal and informal meetings of the policy committees and to what extent other members should be involved and/or invited. The Committee endorsed the recommendations in the report and also recommended that the Compliance and Risk Manager meet with the chairmen of the policy committees to discuss the way in which communication could be improved between policy committees and other members, particularly with regard to informal meetings. A short paper with findings/suggestions will be considered at a future meeting of the Scrutiny Committee.

2.3. The Head of Business Improvement presented a report which gave members the opportunity to assess the value added by the engagement and marketing activity through the various different marketing channels, which incorporated a joined up approach, tying up digital media with more traditional printed media. Members were advised that one of the key marketing successes had been informing members of the public about the use of the Council’s online facilities. As a result there had been a significant increase in residents paying for brown bins by direct debit and the use of the
‘My South Norfolk’ tool to access information. The Link Magazine had also been recently redeveloped and members recognised that the quality had improved. Members endorsed the report.

2.4. The Compliance and Risk Manager next presented a report which gave members an update one year on from the review of the nplaw service that the Committee received in December 2012. Members were reminded of the benefits to the Council of using the nplaw service such as cost savings, access to additional expertise and skills through nplaw, the provision of some free training to officers and profit sharing amongst others. The Compliance and Risk Manager confirmed that nplaw users within South Norfolk had given the service an overall rating of ‘satisfactory’, and that she was aware of some areas in need of improvement which were being worked on. Some of the benefits had been slightly slower to manifest; in particular the Council still remained fairly reliant on a few individual lawyers (former SNC employees) for advice and support whereas it had been considered preferable to be receiving advice from a broader base of lawyers with additional expertise. Overall, the Committee was pleased with progress to date, however resolved to review the issue again in 12 months.

3. Training

3.1. Members of the Scrutiny Committee received dedicated scrutiny training on 18 October 2013. Mark Mower delivered a session that all members found extremely useful and insightful. The session aimed to enable members to:

- Recognise the complementary strengths of the individuals that make up the Scrutiny Committee and the benefits of effective team-working.
- Understand prepared papers and be confident in identifying areas for further probing and investigation.
- Use a range of questioning and investigative techniques to enable them to get to the ‘heart of the issue’ under scrutiny.
- Shape effective conclusions and recommendations from scrutiny work.
- Think strategically and creatively in assessing the links between areas of review, partners and stakeholders.

4. Directorate Plan Member Workshop

4.1. On Thursday 12 December, an informal workshop will be held to look at the draft Directorate Plans for 2014/15 before they go to Cabinet to be agreed. To encourage frank discussion senior managers will be available to discuss their departments’ plans within small groups rather than one main presentation. All members are invited to the session which will assess the extent to which the proposals deliver the Council’s priorities and outcomes, the impact of the proposals on customers and the extent to which the proposals are realistic and achievable.

5. Recommendation

5.1. That Members note the work of Scrutiny as detailed in this report.
Report of the Chairman of the Licensing Appeals and Complaints Committee / Licensing and Gambling Acts Committee

1. Licensing Appeals and Complaints Committee
1.1. A sub-committee met on Thursday 4 November 2013 to consider a homelessness decision. The Panel found in favour of the appellant.

2. Licensing and Gambling Acts Committee
2.1. A sub-committee met on 11 October 2013 to consider an application for a premises licence for Winbirri, Surlingham. This application was granted as submitted.

2.2. A sub-committee met on 17 October 2013 to consider an application for a premises licence for Mulbarton Village Hall. This application was granted with amendments.

3. Training
3.1. On 7 October 2013, members received training on The Scrap Metal Dealers Act 2013. As yet, The Council has not been required to hold a hearing under this Act.

3.2. Homelessness training took place on Friday 11 October 2013. Nigel Brims and Jean Thirtle of nplaw along with David Neville from the Council’s Housing and Advice Team, provided a very useful session, which was well attended by members.

3.3. A training session with nplaw regarding the Licensing Act 2003 is currently being arranged to take place in the early part of next year; the exact date is yet to be confirmed.

Sue Thomson

Chairman
1. In the last quarter, Development Management Committee (DMC) has continued to deal with a number of significant planning applications. At a special DMC meeting in October the Committee had to determine what they would have recommended on a large scale wind turbine proposal (3 x 126m high turbines) in Pulham Market/Dickleburgh. This was because the applicant has appealed to the Planning Inspectorate on non-determination grounds. Members resolved unanimously to say they would have refused the application and this application is now subject to a Public Inquiry being considered in early January.

2. At the Cabinet meeting held on the 28 October members considered a report on amendments to the Scheme on Delegation and with minor amendments the report was agreed. The report is being presented at tonight’s meeting of the full council and I would urge members to support the new Scheme of Delegation. The new scheme, as suggested, will result in much needed changes highlighted in the recent Planning Peer Challenge, in particular they highlighted that better delegation arrangements would enable members to focus on those proposals of district wide significance. A members’ briefing will take place on Thursday 12 December at 12 midday to explain in detail the proposed changes.

3. Many of us attended a successful evening at the Forum for the Council’s Design Awards. A good number of members also attended the Quality Tour which this year looked at a mix of commercial and residential schemes and also at sites coming forward in the future, for example the Norwich Research Park. A good debate was held in the Council Chamber, at the end of the day, on all the schemes looked at including areas where the design could be improved upon in the future.

4. In the New Year training dates will be set. It will include sessions on Design, assessing the Building for Life Criteria and CIL

Cllr Joe Mooney

Chairman
POLICE AND CRIME PANEL FOR NORFOLK

“It is not, what a lawyer tells me I may do; but what humanity, reason, and justice, tell me I ought to do.”
Edmund Burke, Speech in the House of Commons, 22nd March 1775.

1. The scheme of the Police Reform and Social Responsibility Act 2011 envisages that each Police and Crime Panel serves as “a critical friend” to its Police and Crime Commissioner. For this concept to work, it is necessary that there is a relationship of reciprocal trust and respect between the Commissioner and the Panel.

2. In connection with the confirmation process for the new Chief Constable to replace Phil Gormley, there was something of a setback to the development of that necessary mutually co-operative relationship. The Commissioner refused to supply certain information reasonably requested by the Panel. Notwithstanding this unnecessary difficulty the Panel felt able to recommend the Commissioner to proceed with the appointment of Mr Simon Bailey as Chief Constable.

3. The Panel made their concerns public and, unfortunately for the Commissioner, this coincided with media interest in the Commissioner’s claims for travel expenses from his home to Police HQ in Wymondham.

4. Happily the Commissioner has reacted positively on both matters. He has agreed to pay back the travel expenses and has established an external review as to the governance issues arising. He has promised that he will share the outcome of that review with the Panel.

5. An improved relationship with the Panel was evident in the confirmation process for the new Chief Finance Officer to replace Mr Robert Summers who retires shortly. The Commissioner promptly and fully supplied the additional information requested by the Panel. Yesterday the Panel was happy to recommend the Commissioner to proceed with the appointment of Mr John Hummersone as his new Chief Finance Officer.

6. The Act of 2011 requires Police and Crime Panels to hold confirmation hearings for the four principal officers appointed by Police and Crime Commissioners — the Deputy Commissioner, the Chief Constable, the Chief Executive and the Chief Finance Officer. Uniquely, Norfolk is the only Police Area (of forty-one governed by the Act) where all four of these appointments have arisen in the first year of the new arrangements.

7. Having dealt with these confirmation hearings, the Panel can turn to its broader function of holding the Commissioner to account. To this end, a public question-and-answer session will be held on 13th December, 2013. This will be preceded by a Training Workshop at which I will be giving a presentation on the lessons arising from my attendance at the Gloucester Conference which I previously report to Council. On 10th January 2014 the Panel will be considering the Commissioner’s proposed precept for 2014-15.

C J Kemp,
26/xi/2013