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# Oxford City Council

## Annual Monitoring Report 2005

(covering the period April 2004-March 2005)

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## FOREWORD

This is Oxford City Council's first Annual Monitoring Report for planning policies. It covers the period 1<sup>st</sup> April 2004 – 31<sup>st</sup> March 2005. The Planning and Compulsory Purchase Act 2004 (Section 35) requires every local planning authority to submit an annual monitoring report to the Secretary of State containing information on the implementation of the Local Development Scheme (LDS) and the extent to which policies set out in local development documents (LDDs) are being achieved. (The Oxford Local Plan 2001 – 2016 is a LDD).

All local planning authorities are required to submit reports to the Secretary of State and publish the report on their websites by no later than the end of December following each monitoring period. This report covers the following aspects of planning policy monitoring:

**Local Development Scheme monitoring:** this reviews actual plan progress of the LDS compared with the targets and milestones for LDD preparation. Each year, this section of the report will assess whether the City Council:

- has met the LDS targets and milestones or is on target to meet them;
- is falling behind schedule or has failed to meet a target or milestone and the reasons for this;
- the need to update the LDS in light of this information.

**Monitoring policies:** these will be monitored in order to assess<sup>1</sup>:

- whether policies and related targets or milestones in LDDs have been met or progress is being made towards meeting them or where they are not being met or not on track to being achieved, the reasons why;
- what impact the policies are having in respect of national, regional and local policy targets and any other targets identified in LDDs;
- whether the policies in the LDD need adjusting or replacing because they are not working as intended;
- whether the policies need changing to reflect changes in national or regional policy; and
- if policies or proposals need changing, the actions needed to achieve this.

In accordance with Government guidance, the City Council has adopted an objectives-policies-targets-indicators approach to ensure relevant and effective monitoring. A range of indicators have been developed divided into:

- **Core output indicators** – these have been set nationally for all local authorities to provide data in a consistent format. The findings from these indicators will inform the preparation of regional spatial strategy annual monitoring reports.
- **Local output indicators** – these have been selected to supplement the information provided in the core indicators and have been selected to highlight the key circumstances and issues relevant to Oxford.
- **Contextual indicators** – these have been used to show the baseline position of the wider social, environmental and economic circumstances against which the policies operate.

Where appropriate, the report shows how policy monitoring links to national targets such as Public Service Agreement targets and its integration with other City Council initiatives such as the Community Strategy. The existing targets in the Local Plan vary in their precision but more detailed targets will be integrated into Development Plan Documents (DPDs). This report has been compiled in liaison with key stakeholders such as Oxfordshire County Council and the Environment Agency.

It is the intention to provide information in a consistent format year on year to enable comparisons to be made. However the detailed content may vary to reflect particular local issues that may arise or changes to national core output indicators.

<sup>1</sup> Planning Policy Statement 12: Local Development Frameworks

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## INTRODUCTION

It is expected that the Oxford Local Plan 2001-2016 will be adopted by the time this Annual Monitoring Report is submitted to the Secretary of State. This Local Plan sets out the policies and proposals for future development and land use in Oxford. The Local Plan provides the main framework for development control decisions (along with the Regional Spatial Strategy). Under the Planning and Compulsory Purchase Act 2004, the policies in the Local Plan will be 'saved' until they are progressively replaced by policies in Development Plan Documents (DPDs). The timeframe for production of DPDs is set out in the Local Development Scheme. Hence this report assesses the key Local Plan policies.

Oxford covers an area of only 17.6 square miles. Oxford has a resident population of approximately 145,000. It has a huge housing need, even when compared with other cities in the South East region including London. Oxford has a large student population, with an estimated 30,300 at the two Universities alone. With the River Isis, historic colleges and university buildings, Oxford is one of the top tourist attractions in the South East. In addition, Oxford serves as a major shopping centre, centre for public services and a centre of manufacture.

Oxford is one of the largest employment centres in the South East with up to 100,000 jobs and low levels of unemployment. It is an affluent City, but contains pockets of severe deprivation.

Oxford is well located, with easy access to international airports (Heathrow, Gatwick, Birmingham and Luton), the railway network, and the M40 motorway. Oxford is within the M3/M40 wedge, and forms one end of the Oxford-Cambridge arc.

Oxford has a high level of in-commuting, with about half its workforce living outside its boundary. With more than 5 million visitors a year, a large sub-regional catchment area for shopping and other services, and a rapidly growing population, these have major implications for planning policy in Oxford.

### Why Monitor?

Monitoring is essential to establish what is happening now, what may happen in the future and then compare these trends against existing policies and targets to determine what needs to be done. It provides a crucial feedback loop and information on the performance of policy and its surrounding environment. Under the new planning system, with its focus on delivery of sustainable development and sustainable communities, monitoring takes on an added importance in providing a check on whether those aims are being achieved. Monitoring will also enable us to identify the need to review 'saved' Local Plan policies and future DPDs, and respond more quickly to changing priorities and circumstances.

Two of the key factors DPDs will be assessed against at independent examination are whether the policies are founded on a robust and credible evidence base, and whether there are clear mechanisms for implementation and monitoring. Therefore monitoring will be integrated in the development and review of all DPD preparation including the sustainability process in the following way:-

- At the initial evidence gathering stage – we will undertake surveys to establish the key characteristics to take into account such as population, land use issues, housing, economic issues and social factors. From this information we will establish an evidence base.
- During the production of documents – we will use this evidence base to develop potential indicators and policy targets.
- In refining the document following consultation to prepare for submission to the Secretary of State – we will continue to develop the evidence base to establish clear links between the objectives, the policy targets and the proposed output indicators.
- When adopted – we will refine the indicators in response to any objectives and policies proposed in the light of the Inspector's binding report following examination.

The data in this report has been obtained from information submitted with planning applications and analysed through the City Council Uniform computer system except where other sources are listed. The City Council monitors developments that have commenced and completed.

## 2.0 LIST OF ABBREVIATIONS

List of Abbreviations	
<b>AADT</b>	Annual Average Daily Traffic
<b>AMR</b>	Annual Monitoring Report
<b>BAP</b>	Biodiversity Action Plan
<b>BBOWT</b>	Berkshire, Buckinghamshire & Oxfordshire Wildlife Trust
<b>BVPI</b>	Best Value Performance Indicator
<b>DETR</b>	Department of the Environment, Transport & the Regions
<b>DPD</b>	Development Plan Document (part of the Local Development Framework)
<b>DPH</b>	Dwellings per Hectare
<b>LDD</b>	Local Development Document (part of the Local Development Framework)
<b>LDF</b>	Local Development Framework
<b>LDS</b>	Local Development Scheme
<b>LTP</b>	Oxfordshire Local Transport Plan
<b>ODPM</b>	Office of the Deputy Prime Minister
<b>ONS</b>	Office of National Statistics
<b>PDL</b>	Previously Developed Land
<b>PPG</b>	Planning Policy Guidance
<b>PPS</b>	Planning Policy Statement
<b>RPG</b>	Regional Planning Guidance
<b>PSA</b>	Public Service Agreement
<b>RSS</b>	Regional Spatial Strategy
<b>SEP</b>	South East Plan
<b>SEERA</b>	South East England Regional Assembly
<b>SEEDA</b>	South East England Development Agency
<b>SOA</b>	Super Output Area
<b>SPD</b>	Supplementary Planning Document
<b>SPG</b>	Supplementary Planning Guidance
<b>SSSI</b>	Sites of Special Scientific Interest
<b>TVERC</b>	Thames Valley Environmental Record Centre

### 3.0 LOCAL DEVELOPMENT SCHEME

This section addresses progress towards the milestones set out in the Local Development Scheme (LDS) and assesses whether the LDS timetable is being met. The LDS 2005-08 is available to view on the City Council's website [www.oxford.gov.uk/ldf](http://www.oxford.gov.uk/ldf)

#### Period 2004/05

Only one document was programmed for production during this period, the Oxford Local Plan 2001–2016. The LDS shows the following stages and target dates for the production of the Local Plan. The shaded section shows the period 2004/05. The table illustrates that all the target dates set for the Local Plan stages were met.

Local Plan Stage		Date achieved	
Commence pre-production & community engagement	April 1999	April 1999	✓
Commencement of deposit - First Draft	June 2002	28 <sup>th</sup> June 2002	✓
Commencement of deposit - Second Draft	February 2003	21 <sup>st</sup> February 2003	✓
Commencement of consultation - PICs	September 2003	26 <sup>th</sup> September 2003	✓
Pre-inquiry meeting	November 2003	25 <sup>th</sup> November 2003	✓
Commencement of the inquiry	March 2004	2 <sup>nd</sup> March 2004	✓
Close of the inquiry	August 2004	12 <sup>th</sup> August 2004	✓
Receipt of Inspector's Report	February 2005	8 <sup>th</sup> February 2005	✓
Publication of Inspector's Report	February 2005	9 <sup>th</sup> February 2005	✓
Commencement of deposit - modifications	June 2005	17 <sup>th</sup> June 2005	✓
Adoption	November 2005	11 <sup>th</sup> November 2005	✓

#### BV200 – new plan-making

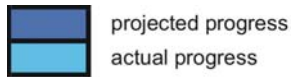
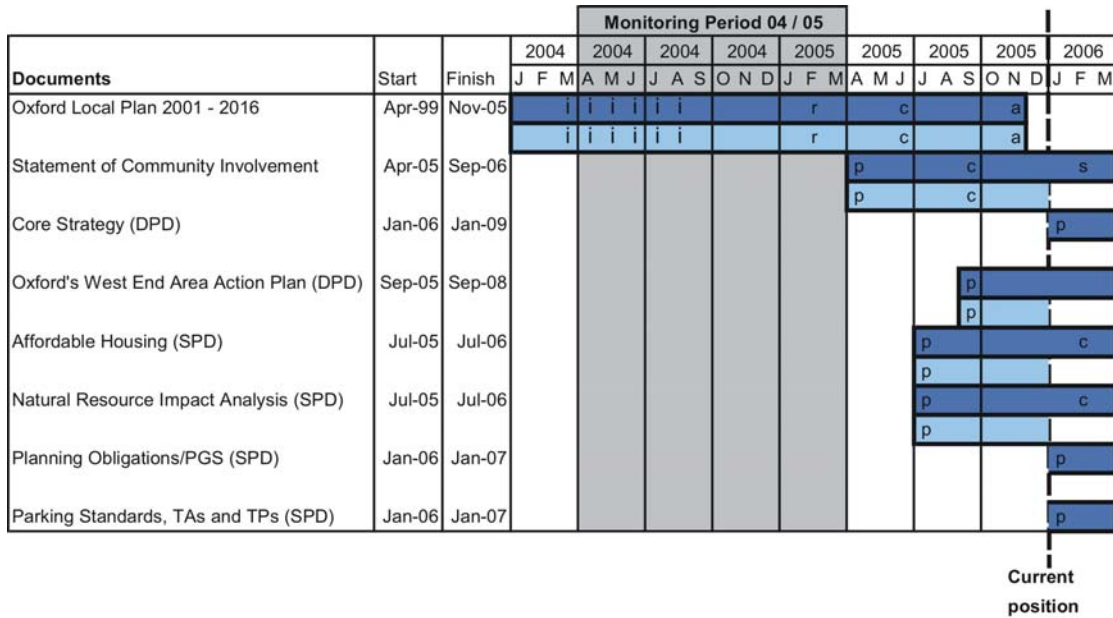
Best Value Performance Indicator 200 asks two linked questions:

- a. Do you have a development plan that has been adopted in the last 5 years and the end date of which has not expired?
- b. If 'no', are there proposals on deposit for an alteration or replacement, within a published timetable for adopting those alterations or replacement plan within three years?

As of November 2005, Oxford City Council does have an adopted plan that meets the requirements of question a., and therefore the requirements of question b. do not need to be met (albeit they are also met).

#### Beyond 2004/05

Whilst the milestones of the LDS for the period 2004/05 have been met as described above, it is also of note that to date (December 2005), those for the period 2005/06 have also been met. This is illustrated in the diagram below. It is anticipated that the remaining milestones for the period 2005/06 can also be met on target; this will be assessed in the City Council's Annual Monitoring Report 2006.



- i = inquiry
- r = receive Inspector's Report
- p = begin preparations
- c = consultation
- s = Submit to SoS
- a = adopt

**Figure 1: Local Development Scheme Milestones**



## 4.0 SUMMARY OF KEY FINDINGS

The most significant factor influencing planning policy during the period covered by this first monitoring report was the Oxford Local Plan Inquiry. The Inquiry was held between March and August 2004 and the Inspectors report was received in February 2005. Therefore by the end of the monitoring period, significant weight could be attached to its policies. With the adoption of the Local Plan by the time this report is published, we look forward to the successful implementation of the policies developed and the realisation of their influence on future development control decisions. The effectiveness of this implementation will be highlighted in future reports.

The City Council also produced its first Local Development Scheme (LDS) setting out its project plan for policy development over the next 3 years. The target dates for the production of the Local Plan was the only document included in the LDS during the monitoring period and the target dates were achieved. It is also on target for achieving the milestones set beyond the monitoring period for developing new Local Development Documents.

One of the major planning issues in Oxford is how to provide more housing to meet the huge demand, and in particular the need for affordable housing. Our analysis of permissions and predicted future provision means Oxford is likely to exceed the Local Plan and Structure Plan target to 2016. It is also pleasing to note that the net number of affordable housing completions (186) achieved in the monitoring period was above the draft Housing Strategy annual target of 150 dwellings. However with the Housing Requirements Study identifying an annual need of 1700-1800 affordable dwellings per year, the amount of affordable housing achieved through negotiated planning obligations alone will not satisfy the level of need. The increase in the number of residential permissions for small scale developments (less than 10 units) and its potential impact on the provision of affordable housing will be carefully analysed in future monitoring reports.

With student numbers at the two Universities increasing at a far greater rate than predicted in the Local Plan, any further increase in both student numbers and student accommodation will need to be carefully monitored so that appropriate remedial action can be taken should student numbers increase more rapidly than student accommodation. As the increase in student numbers is predominantly due to more efficient use of existing buildings and not as a result of increased academic floorspace, the growth in numbers has not been within the control of the City Council.

The monitoring period has also seen a growth of floorspace in the research and development sector and manufacturing/industrial uses. All this development has been on previously developed land which makes better and more efficient use of existing resources.

There has been little retail and office development completed during the monitoring period. There has been a significant increase in the indoor leisure sector with the completion of the Ozone Leisure Centre at Grenoble Road.

In terms of facilities for tourists, whilst the overall supply of short stay accommodation has increased in the monitoring period with additional hotel provision, two large guest houses have been lost. It is hoped that any future loss of guest house accommodation will be curbed now more weight can be given to the Local Plan policies.

On car parking standards, 84% of completed non-residential developments complied with car parking standards. It is expected that compliance with disabled and cycle parking standards will improve in future years with the implementation of revised standards.

As this is the first monitoring report, it should be viewed in the context of providing an important evidence base from which to assess future reports. Although the report draws attention to various key issues, care should be taken not to draw detailed conclusions from the indicators at this stage. It is hoped to develop a more detailed assessment of future trends as the evidence base develops.

## 5.0 INDICATORS

### HOUSING

<b>Indicator 1 (Core)</b>	<b>Housing trajectory</b> i) net additional dwellings completed over the previous 5 year period or since the start of the relevant DPD period, whichever is the longer; ii) net additional dwellings completed for the current year; iii) projected net additional dwellings up to the end of the relevant DPD period or over a 10 year period from its adoption, whichever is the longer; iv) annual net additional dwelling requirement (annual rate of housing provision required); v) annual average number of net additional dwellings needed to meet overall housing requirements, having regard to previous year's performance.
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#### Objective

To plan, monitor and manage the delivery of new housing in accordance with development plan requirement.

#### Target

Nationally, an objective of the ODPM is to “Achieve a better balance between housing availability and the demand for housing, including improving affordability, in all English regions while protecting valuable countryside around our towns, cities and in the green belt and the sustainability of towns and cities.”<sup>1</sup> The draft South East Plan<sup>2</sup> was published in January 2005 however, the strategic housing target for the Oxfordshire regions has not yet been established and will following in Spring 2006. Consultation is underway regarding the strategic target. The deposit draft Oxfordshire Structure Plan 2016<sup>3</sup> and Oxford’s Local Plan 2001-2016<sup>4</sup> sets a strategic target for Oxford as 6,500 dwellings to be provided between 2001-2016.

#### Data analysis

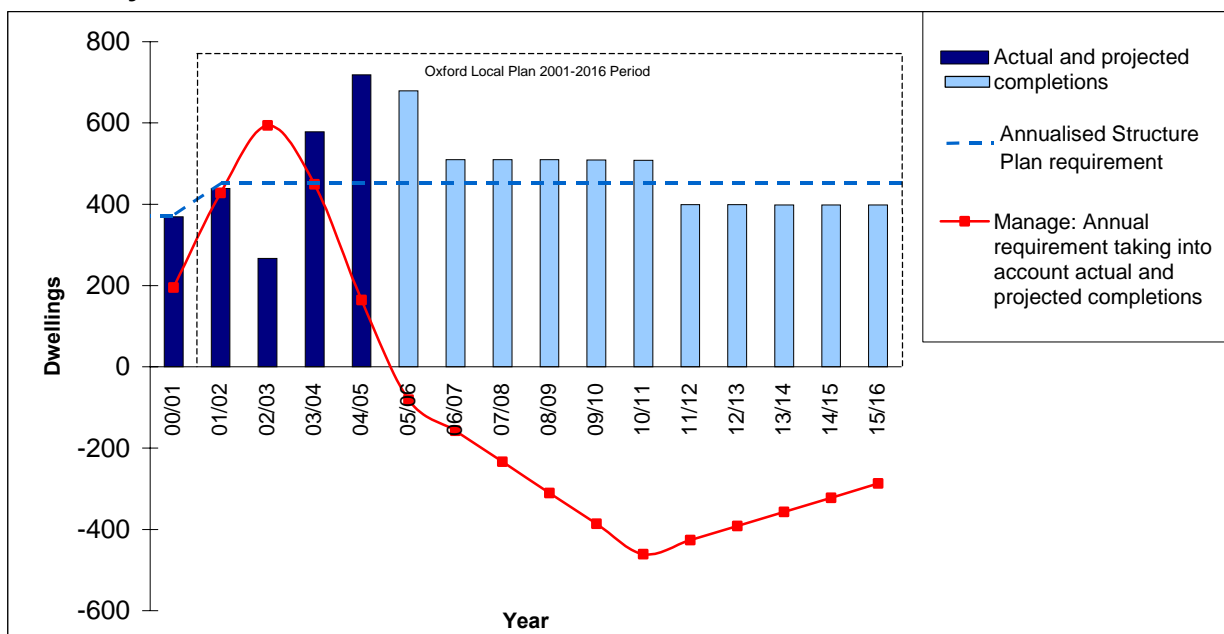


Figure 2: The past<sup>5</sup> and anticipated supply of housing during the Plan period 2001-2016 (Oxford City Council)

<sup>1</sup> PSA5, Public Service Agreement 2005-2008, Office of the Deputy Prime Minister

<sup>2</sup> *The South East Plan*, South East England Regional Assembly, January 2005

<sup>3</sup> Deposit Draft Oxfordshire Structure Plan 2016 (as amended by the Proposed Modifications), Sept 2003

<sup>4</sup> Policy HS.1, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>5</sup> Includes data from 2000/2001 in order to show the past five year period as required by Table 4.4 *Local Development Framework Monitoring: A Good Practice Guide*, ODPM, March 2005

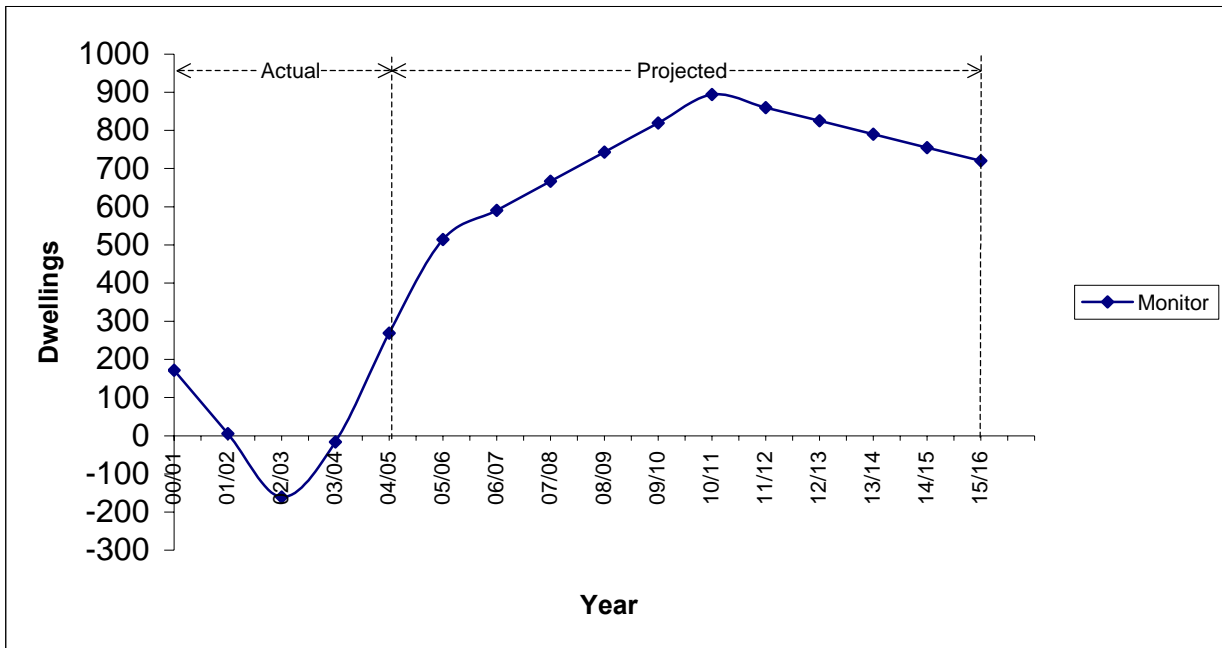


Figure 3: The position above or below zero represents how many dwellings Oxford City Council is ahead or behind their cumulative allocation at any point in time (Oxford City Council)

See Appendix 1 for comprehensive data table of housing trajectory figures.

### Commentary

During the past five years, the completions rate in Oxford has fluctuated above and below that shown in Figure 2, however, the projection suggests that sites will come forward for development which would result in the target being exceeded (Figure 3). This projection is a result of work undertaken for the Urban Potential Study 2005 and updated by Oxford City Council databases. Figure 4 shows the expected pattern of permissions and completions, whereby any rise in permissions one year, leads to a rise in completions the following years, due to the lag time from permission to construction.

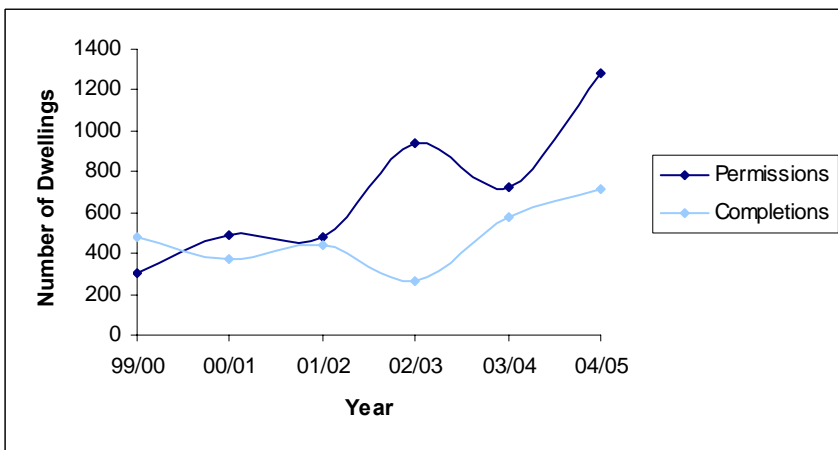


Figure 4: Pattern of total permissions and completions over the past five years (Oxford City Council)

Year	Permissions	Completions
99/00	307	477
00/01	489	369
01/02	482	439
02/03	938	267
03/04	726	578
<b>04/05</b>	<b>1279</b>	<b>718</b>

The increase in the permissions, and ultimately completions, is a result of a number of factors which include increased densities, allocated sites yielding more units than predicted, a considerable increase in the number of high density conversions as well as the possible impact of a profitable property market which is attractive to small scale house builders.

On target? ✓

<b>Indicator 2 (Core)</b>	<b>Percentage of new and converted dwellings built on previously developed land (gross)</b>
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**Objective**

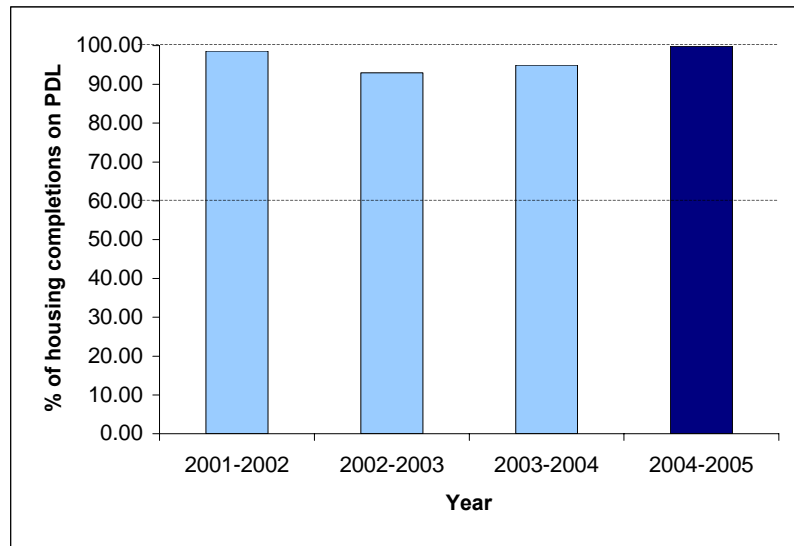
To maximise the re-use of previously developed land (PDL) in order to promote regeneration and minimise the amount of non-previously developed land being taken for development.

**Target**

Nationally, at least 60% of additional housing should be provided on previously developed land<sup>1</sup>. The South East region as a whole, over the 2006-2026 period, the same target was set<sup>2</sup>. The Oxford Local Plan<sup>3</sup> sets a target to build 95-100% of new dwellings between 2001-2016 on previously-developed land.

**Data analysis**

Year	Percentage of housing completions on PDL
2001/2002	98.60%
2002/2003	93.00%
2003/2004	95.00%
<b>2004/2005</b>	<b>99.87%</b>



**Figure 5: Percentage of new and converted dwellings built on Previously developed land 2004/2005 compared to previous years (Oxford City Council)**

**Commentary**

Oxford is composed predominantly of an urban environment with some wedges, mainly Green Belt, running through the City. The urban nature of Oxford offers the opportunity to re-use a considerable proportion of previously developed land. The City Council has therefore been able to exceed the target of 60% set in national and regional guidance quite considerably since the beginning of the Plan period.

The general trend of the last few years is an upward one and, during 2004/2005, 99.87% of all new dwellings were built on previously developed land. It is considered that the percentage is unlikely to fall below the Local Plan target of 95% over the next five years.

**On target?** ✓

<sup>1</sup> *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000 and BVPI 106

<sup>2</sup> *The South East Plan*, South East England Regional Assembly, January 2005

<sup>3</sup> Paragraph 6.7.4, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<b>Indicator 3 (Core)</b>	<b>Housing densities</b> Percentage of new (gross) dwellings completed at: i) less than 30 dwellings per hectare (dph); ii) between 30 and 50 dph; iii) above 50 dph.
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### Objective

To ensure an efficient and appropriate use of land.

### Target

PPG3<sup>1</sup> encourages housing development which makes more efficient use of land (between 30 and 50 dwellings per hectare) and should seek higher densities in areas with good public transport accessibility. Most areas of Oxford are sustainably located and so the Oxford Local Plan<sup>2</sup> set a target that residential development should generally be above 40 dph with higher densities on appropriate sites.

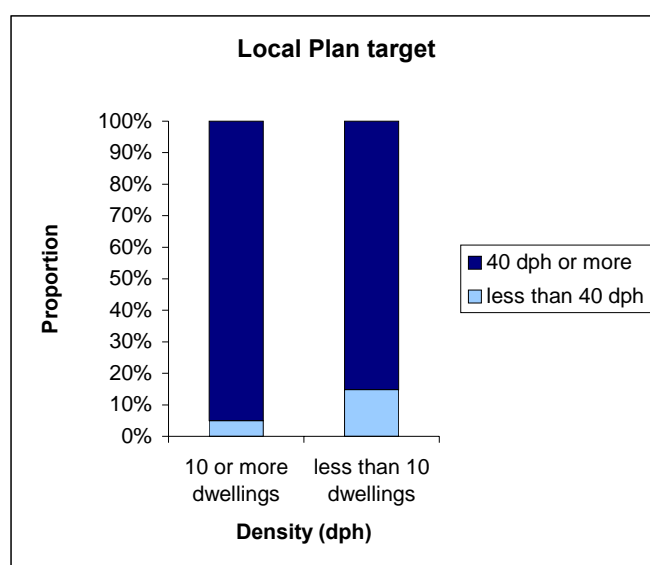
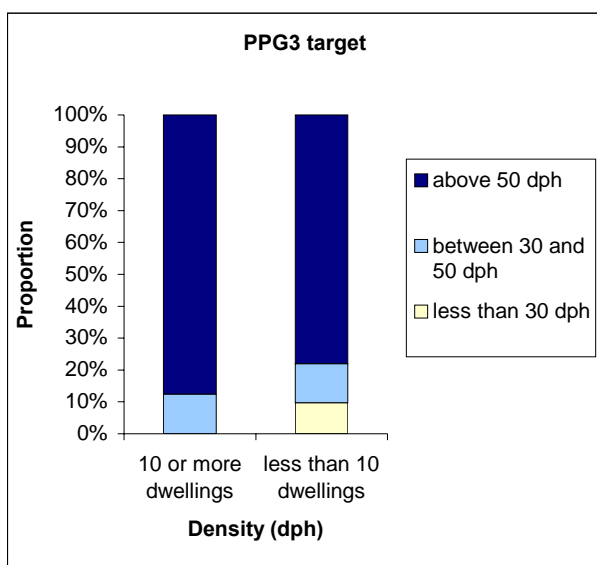
### Data analysis

Density of completions 2004-2005 :

Density (PPG3 target)	Sites of ≥ 10 dwellings	Sites of < 10 dwellings
less than 30 dph	0%	9.74%
between 30 and 50 dph	12.41%	12.29%
above 50 dph	87.59%	77.97%

Density (Local Plan target)	Sites of ≥ 10 dwellings	Sites of < 10 dwellings
Less than 40 dph	4.96%	14.83%
40 dph or more	95.04%	85.17%

dph = dwellings per hectare



**Figure 6: Density of dwellings (PPG3 and Local Plan targets) completed (gross) during 2004/2005 split by site capacity (Oxford City Council)**

<sup>1</sup> Paragraph 58, *Planning Policy Guidance note 3*, DETR, 2000

<sup>2</sup> Policy CP.6, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

## Commentary

In Oxford, there is a huge need for housing, but there is only a limited amount of land available for development. The City Council therefore expects land to be developed efficiently. Most areas of Oxford have excellent public transport links and are considered very sustainable so higher densities have generally been appropriate. PPG3 and the Local Plan recognises that density may not always be a useful measure on small sites of less than 10 dwellings so the data has been split to show densities of both large and small sites separately.

The results show that on large sites, the density of completions during 2004/2005 have been at the PPG3 target of 30-50 dph or higher, with a significant proportion above 50 dph. Small sites have been also been achieving a high proportion at higher densities, although this is likely to reflect the large number of developments of 1 or 2 dwellings where access roads and landscaping may not be required. Due to the compact nature of Oxford, a significant proportion of sites that come forward for development are small sites so it is considered worthwhile monitoring the density of small sites. The threshold for affordable housing provision is 10 dwellings and so the City Council will use this data to check that contributions to the provision affordable housing are not being lost as a result of underdevelopment.

Over 95% of dwellings completed on sites of 10 or more dwellings were built at a density of 40 dph or more. This is considered to be consistent with Policy CP.6 of the Oxford Local Plan 2001-2016. This level of density is expected to be consistently achieved in the future, however, the draft Supplementary Planning Document on Affordable Housing is likely to seek a greater number of larger dwellings and a fewer number of small dwellings than the current Supplementary Planning Document on Social Housing<sup>3</sup> due to the great need for affordable housing for families. This may result in reduced densities overall, however, the densities are not considered likely to reduce so much that it would result in underdevelopment and be contrary to Policy CP.6.

On target? ✓

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<sup>3</sup> Paragraph 22, Supplementary Planning Guidance on Social Housing, Oxford City Council, April 2001

<b>Indicator 4 (Core)</b>	<b>Number of affordable housing completions</b>  i) Gross number of affordable housing completions; ii) Net number of affordable housing completions.
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## Objective

To secure a proportion of affordable housing to help meet housing needs.

## Target

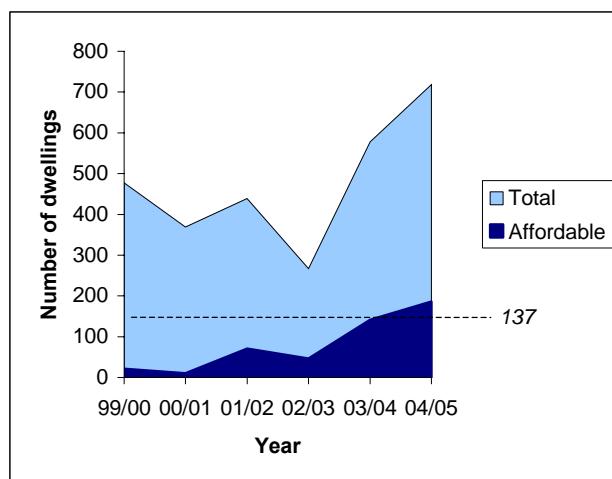
PPG3<sup>1</sup> says that local authorities should use surveys to demonstrate local need for affordable housing. These surveys would then form the basis for Local Plan policies on the delivery of affordable housing. The draft Regional Spatial Strategy for the South East sets an overall regional target that 35-40%<sup>2</sup> of all new housing should be affordable. In order for the region to achieve this, some authorities targets that are lower than this will be balanced with authorities with higher targets.

The Oxford Local Plan 2001-2016 requires 50% of dwellings to be affordable on residential sites with a capacity of 10 or more dwellings or on a residential site of 0.25ha<sup>3</sup>. The Local Plan seeks a contribution towards affordable housing from commercial development<sup>4</sup>. Oxford has a strategic target provision of 6,500 dwellings over the Plan period and by assessing the trend of size of sites coming forward for development, it is considered that the yield of affordable dwellings from residential development with the Local Plan 2001-2016 Policies should be approximately 2,060 dwellings (137 per year). Oxford's draft Housing Strategy<sup>5</sup> sets a target of 150 dwellings per annum.

## Data analysis

<b>Gross affordable housing completions 2004/2005</b>	186
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Year	Net total dwelling completions	Net affordable dwelling completions	Proportion of total dwellings that are affordable
99/00	477	21	4.4%
00/01	369	10	2.7%
01/02	439	71	16.2%
02/03	267	46	17.2%
03/04	578	141	25.7%
<b>04/05</b>	<b>718</b>	<b>186</b>	<b>25.9%</b>



**Figure 7: Net total dwelling completions compared with net affordable dwelling completions (Oxford City Council)**

<sup>1</sup> Paragraph 16, *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000

<sup>2</sup> Policy H4, *The South East Plan*, South East England Regional Assembly, January 2005

<sup>3</sup> Policies HS.4 and HS.5, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>4</sup> Policy HS.7, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>5</sup> Page 23, *Draft Housing Strategy for Oxford 2005-2008*, Oxford City Council, March 2005

## Commentary

The gross and net number of affordable housing completions for the 2004/2005 period was 186. It is considered useful to compare net affordable housing completions with net total housing completions to indicate the proportion of affordable housing being developed compared to all completions. This data is available for the previous 5 years and shows that there is generally an upward trend in the actual number of affordable dwellings and in their proportion of the total dwellings completed. The proportion of affordable housing permitted is analysed at Indicator 7.

The total number of dwellings completed in Oxford is increasing which has predictably lead to an increase in affordable housing completions. The affordable housing policies in the Local Plan do not appear to be having an adverse impact upon the delivery of affordable housing. However, due to the limited land available in Oxford, developers appear to be turning to small scale infill plots and conversions of family sized dwellings and these types of developments tend to be below the threshold for providing affordable housing so it will be important to monitor the trend in affordable housing delivery.

The need for affordable housing is so huge that it would be impossible to meet all the need therefore a more realistic approach must be taken. Whilst there is no set target in the Local Plan for the number of affordable units to be completed each year, Oxford's draft Housing Strategy<sup>5</sup> sets a target of 150 dwellings per annum. The 2004/2005 figure was considerably greater than 150, which is due to the fact that there have been a much higher number of permissions and completions over the last few years than had been predicted so therefore the number of affordable dwellings has also increased. It will be important to reassess the size of sites coming forward for development in the light of general development trends, following which it may be necessary to reduce the threshold.

The Housing Requirement Study<sup>6</sup> estimated that for the next 5 years, there is a shortfall of affordable housing in Oxford of around 1,700 – 1,800 affordable homes per year. Therefore whilst the 2004/2005 figure is greater than expected, it falls significantly short of that needed to meet the shortfall of affordable housing. It is clear that to deliver significantly more affordable housing negotiated through planning obligations alone will not satisfy this level of need.

On target? ✓

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<sup>5</sup> Page 23, Draft Housing Strategy for Oxford 2005-2008, Oxford City Council, March 2005

<sup>6</sup> Oxford Housing Requirements Study, Fordham Research, April 2004



<b>Indicator 5 (Local)</b>	<b>Number of affordable housing permissions against completions</b>
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**Objective**

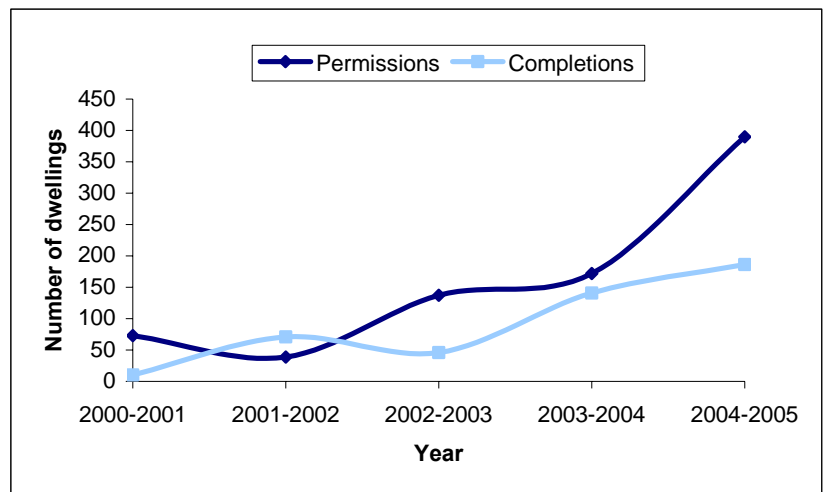
To enable the delivery of affordable housing to help meet housing needs.

**Target**

To ensure that every affordable dwelling that is permitted is completed and occupied, within a reasonable and acceptable time frame.

**Data analysis**

Year	Affordable housing permissions	Affordable housing completions
2000/2001	73	10
2001/2002	39	71
2002/2003	137	46
2003/2004	172	141
<b>2004/2005</b>	<b>390</b>	<b>186</b>



**Figure 8: Pattern of affordable housing permissions and completions over the past five years (Oxford City Council)**

**Commentary**

Indicator 5, compares the number of affordable housing permissions with the number of affordable housing completions. The expected time lag from permissions to completion is noticeable as is the relative closeness of the two lines on Figure 8 compared to the similar line in Figure 4 (Indicator 1). Developers are under obligation to build the affordable housing via a S106 legal agreement (planning obligation) and agreement with a Registered Social Landlord, and this is reflected in Figure 8. However, developers are under no obligation to implement planning applications with solely market housing which is why there is a difference between the delivery of market and affordable housing. On occasions, planning permissions for market housing are not implemented although this is more common on smaller sites and conversions as opposed to large schemes.

It may be useful in future AMRs to monitor the delivery of a signed Section 106 legal agreement (planning obligation) and whether or not this is having an impact on the delivery of affordable housing.

**On target?** ✓

<b>Indicator 6 (Local)</b>	<b>Cash contribution received during monitoring period towards affordable housing from:</b>  i) Residential development; ii) Commercial development.
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### Objective

To secure financial contributions towards affordable housing from commercial development and from residential development (instead of on-site provision) in exceptional circumstances.

### Target

PPG3 states “Local planning authorities should encourage the development of mixed and balanced communities: they should ensure that new housing developments help to secure a better social mix by avoiding the creation of large areas of housing of similar characteristics”<sup>1</sup> and that “there is a presumption that such housing should be provided as part of the proposed development of the site”<sup>2</sup>.

The consultation document *Planning for Mixed Communities*<sup>3</sup> also emphasises that the presumption is that affordable housing should be in kind and on-site.

The draft Regional Spatial Strategy for the South East <sup>4</sup> also states that “There will be a presumption in favour of on-site affordable housing provision” and The deposit draft Oxfordshire Structure Plan 2016 says that provision of affordable housing will normally be on-site<sup>5</sup>.

Policy HS.6 of the Oxford Local Plan says that that affordable housing should be provided on-site as part of the proposed development. Policy HS.7 seeks a contribution from commercial development where a need for affordable housing is related to that commercial development. This will be provided on-site where the commercial development is part of a mixed use scheme.

### Data analysis

A financial contribution of £100,000 was received in 2004/2005 arising from a development for flats at The Dale, Bayswater Farm Road towards the provision of affordable housing in Oxford City. No financial contributions were received from commercial developments. The table below shows the contributions received over the past 5 years, as cash in lieu and as affordable housing in kind (on-site provision).

	1999/2000	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005
<b>Cash in lieu (£) received for the provision of affordable housing</b>	446,815	0	477,969	573,650	0	<b>100,000</b>
<b>On-site provision (affordable dwellings permitted)</b>	-	73	39	137	172	<b>390</b>

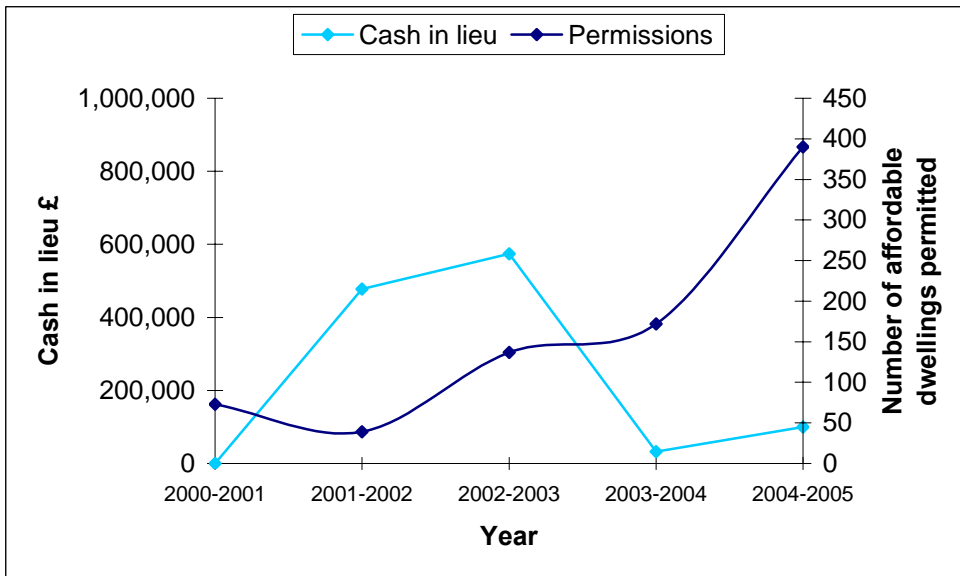
<sup>1</sup> Paragraph 10, *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000

<sup>2</sup> Paragraph 17, *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000

<sup>3</sup> Paragraph 12, *Planning for Mixed Communities*, Office of the Deputy Prime Minister, January 2005

<sup>4</sup> Policy H4, *The South East Plan*, South East England Regional Assembly, January 2005

<sup>5</sup> Policy H4, *Deposit Draft Oxfordshire Structure Plan 2016*, September 2003



**Figure 9: Contributions towards affordable housing received via cash in lieu and on-site (Oxford City Council)**

### Commentary

The financial contribution received will be added to contributions from other developments received in previous financial years totalling over £1.8m. The majority of this funding is allocated to two affordable housing schemes hoped to be implemented in 07/08.

While the two sets of data in the table are not actually comparable, figure 9 shows the fluctuations in the amount of the cash in lieu contributions received. This is because there are generally few sites where the City Council have accepted cash in lieu in the past and these sites came forward sporadically, creating an uneven distribution in the contribution. During 2004/2005 the amount received was significantly less than the other years when cash was received which suggests the beginning of a downward trend. At the same time the trend of affordable dwelling completions is increasing. This is mainly due to the impact of the policies<sup>6</sup> in the Oxford Local Plan 2001-2016. However the application of Policy HS.6 is expected to contribute to an increase in the number of affordable dwellings contributed on-site while reducing the contributions received as cash in lieu. Policy HS.6 does allow for exceptions to on-site provision, although it is considered that these situations will be rare as due to the limited land available in Oxford, it will be a challenge finding available sites to develop affordable housing schemes on.

Contributions that are received due to the need for affordable housing arising from a commercial development are more likely to be as cash in lieu, however, in a mixed use development involving residential, the presumption will be for the on-site provision of affordable housing.

A formula for calculating affordable housing contributions from commercial development will be set out in the Affordable Housing Supplementary Planning Document (SPD), a draft of which is expected by the end of 2005. As yet, no contributions have been received from commercial development, however, this is expected to change once the draft SPD is published which will set out the draft formula.

**On target?** ✓

<sup>6</sup> Policies HS.5 and HS.6, Oxford Local Plan 2001-2016, Oxford City Council

<b>Indicator 7 (Local)</b>	<b>Average percentage of affordable housing permitted via S106 legal agreements (planning obligations) on residential sites</b>
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## Objective

To secure a proportion of affordable housing to help meet housing needs.

## Target

PPG3<sup>1</sup> says that local authorities should use surveys to demonstrate local need for affordable housing. These surveys would then form the basis for Local Plan policies on the delivery of affordable housing. The draft Regional Spatial Strategy for the South East sets an overall regional target that 35-40%<sup>2</sup> of all new housing should be affordable. In order for the region to achieve this, some authorities targets that are lower than this will be balanced with authorities with higher targets.

The Oxford Local Plan 2001-2016 requires 50% of dwellings to be affordable on residential sites with a capacity of 10 or more dwellings, or on a residential site of 0.25ha<sup>3</sup>. The Local Plan seeks a contribution towards affordable housing from commercial development<sup>4</sup>. Oxford has a strategic target provision of 6,500 dwellings over the Plan period and by assessing the trend of size of sites coming forward for development, it is considered that the yield of affordable dwellings from residential development with the Local Plan 2001-2016 Policies should be approximately 2,060 dwellings (137 per year).

## Data analysis

	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005
<b>Average proportion of affordable housing from S106 legal agreements</b>	30.29%	27.86%	28.78%	43.35%	<b>44.60%</b>

## Commentary

Indicator 4 set out the number of affordable dwellings completed as a proportion of all dwellings. Indicator 7 however, specifically looks at the proportion of affordable housing permitted on where there is a policy requirement for affordable housing provision.

Policy HO6 in Oxford Local Plan 1991-2001 required a minimum of 20% affordable housing from qualifying sites. The SPG in 2001 clarified that the City Council would seek generally 30% of a proposed development to be affordable housing on suitable sites. The first and second drafts of the Oxford Local Plan 2001-2016 were published during the 2002/2003 year so their influence, as material considerations, and thus the application of Policy HS.5, became noticeable in the following year by the increase in the proportion. However, the Local Plan Inquiry Inspector's report, which recommended in favour of Policy HS.5 was not received until February 2005 so the average proportion achieved during 2004/2005 were slightly below the target of 50%. The Oxford Local Plan 2001-2016 is due to be adopted in November 2005 and it is expected that the average proportion of affordable housing permitted on S106 legal agreements (planning obligation) will increase to a minimum of 50% from the beginning of 2006.

**On target?** ✓

<sup>1</sup> Paragraph 16, *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000

<sup>2</sup> Policy H4, *The South East Plan*, South East England Regional Assembly, January 2005

<sup>3</sup> Policies HS.4 and HS.5, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>4</sup> Policy HS.7, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<b>Indicator 8 (Local)</b>	<b>Mix of housing completed by house size in respect of:</b>  i) market dwellings; ii) affordable dwellings.
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### Objective

To ensure a mix of dwelling sizes is achieved in order to maintain, and create, sustainable communities.

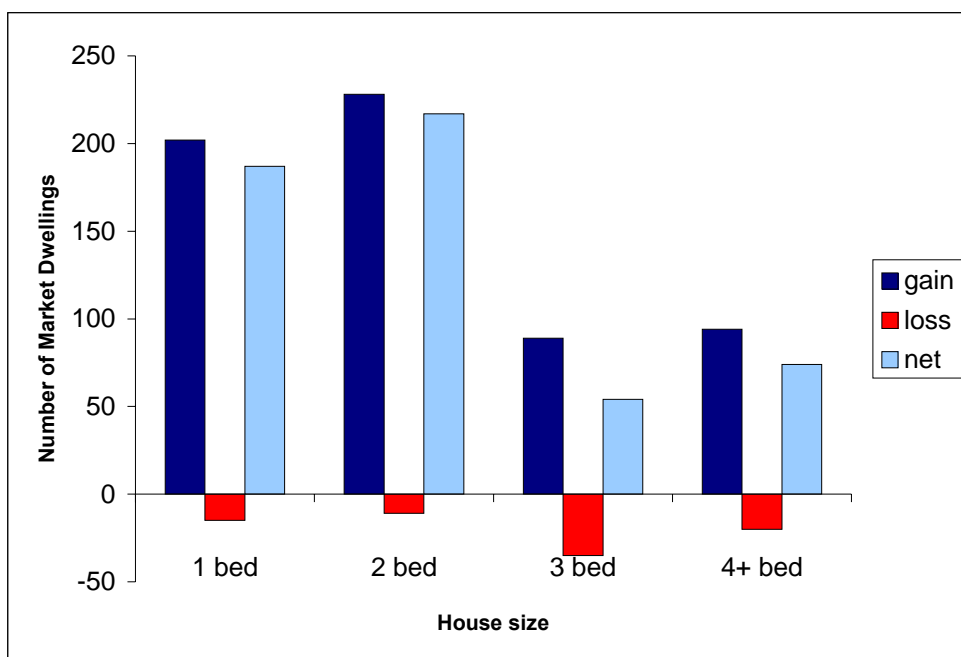
### Target

An objective of PPG3 is that Local Planning Authorities should “*plan to meet the housing requirements of the whole community*”<sup>1</sup>. The ODPM published a consultation document which states that “*Local Planning Authorities should ensure that their policies seek to achieve a mix of housing which will create sustainable communities by securing a wide range of housing which promotes social inclusion.*”<sup>2</sup>

The draft Regional Spatial Strategy for the South East states that “*Local Development Documents should seek to facilitate an appropriate range of housing opportunities in terms of a mix of housing types, sizes and tenure.*”<sup>3</sup>

The Oxford Local Plan 2001-2016 seeks to achieve a balance mix of dwelling sizes within a site and within a locality in order to maintain and create sustainable communities.<sup>4</sup> Oxford’s draft Housing Strategy<sup>5</sup> seeks to meet the needs of a range of households within Oxford which requires affordable dwellings to be of the right size to meet that need.

### Data analysis



**Figure 10: Mix of market dwelling size completed during 2004/2005 (Oxford City Council)**

<sup>1</sup> Paragraph 2, *Planning Policy Guidance note 3*, Department of the Environment Transport and the Regions, 2000

<sup>2</sup> Paragraph 5, *Planning for Mixed Communities*, ODPM, January 2005

<sup>3</sup> Policy H6, *The South East Plan*, South East England Regional Assembly, January 2005

<sup>4</sup> Policy HS.8, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>5</sup> Draft Housing Strategy for Oxford 2005-2008, Oxford City Council, March 2005



Figure 11: Mix of affordable dwelling size completed during 2004/2005 (Oxford City Council)

	Number of dwellings completed in 2004/2005 that were 1 or 2 bed in size	Total number of dwellings completed on 2004/2005	Proportion of dwellings completed that were 1 and 2 bed dwellings
Market	404	532	75.93%
Affordable	131	186	70.43%
Total	535	718	74.51%

## Commentary

Figure 10 and the table show that the size of market dwellings completed during 2004/2005 was significantly skewed towards one and two bed units. Figure 11 shows a notable skew towards two bed affordable dwellings compared to other sized dwellings that were completed during 2004/2005.

On a site by site basis, the majority of the large sites completed during 2004/2005 were on out of centre sites where a mix of units was generally achieved. On smaller sites and in the City centre, the pattern of development tends to be of a large number of small flats, which does not achieve a mix on-site.

Smaller units (both market and affordable) are generally more profitable to developers, and with the push towards higher densities since the publication of PPG3, smaller units on new build developments are commonly proposed. Oxford has the additional problem of having a limited land supply so developers are resourceful in finding sites to develop which often include the conversion of typical three bed semi detached houses into two flats. These conversions are primarily represented in Figure 10 by the loss of three bed market dwellings.

Due to the time lag between permissions and completions, it is expected that future years will show more of a skew away from three and four bed completions because of the more recent influx of permissions for conversions and for one bed purpose built flats. This is apparent from an initial review of permission data and is expected to be noticeable in the next AMR.

It is difficult at this stage to assess whether or not the City Council is 'on target' to meet the objective of Policy HS.8 because the information in this indicator is only a snapshot taken of completions during the monitoring period of 2004/2005. To consider whether or not the City Council is achieving an appropriate mix of dwelling sizes, further evidence must be taken into consideration. A robust assessment would consider the dwelling sizes of the current housing stock in Oxford and how the completions during 2004/2005 affect the mix of the existing stock. It would also consider the demographics of Oxford and

what impact this has on the need for particular sizes of market dwellings because although there were more one and two bed dwellings completed during 2004/2005 than three and four bed dwellings resulting in what appears to be an imbalance, the smaller dwellings are still meeting a recognised need in Oxford. Census<sup>1</sup> evidence shows that in Oxford there was a 3.4% increase in one person households between 1991 and 2001 and a decrease in households of two and four or more persons. The City Council must therefore be careful not to draw immediate conclusions from the evidence in this indicator without first considering all the factors which form the evidence base for the mix of dwellings in Oxford.

In conclusion, while the completions over 2004/2005 do not show an even mix of dwellings sizes, there is a recognised need for smaller dwellings and so, it is considered that at this stage, and in the absence of a detailed evidence base to support a robust assessment, the City Council should be regarded as being on target. It should be noted that the City Council is commissioning a study to compile the evidence base which will be available well in advance of the next Annual Monitoring Report.

**On target?** ✓

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<sup>1</sup> National Statistics website: [www.statistics.gov.uk](http://www.statistics.gov.uk) (2001) and Office for National Office of Population Censuses and Surveys (1991). Crown copyright material is reproduced with the permission of the Controller of HMSO.

<b>Indicator 9 (Local)</b>	<b>Affordable dwellings permitted and completed analysed by tenure</b>
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### Objective

To assess if a suitable balance of affordable housing is being achieved.

### Target

The ODPM published a consultation document which states that “*Local Planning Authorities should ensure that their policies seek to achieve a mix of housing which will create sustainable communities by securing a wide range of housing which promotes social inclusion.*”<sup>1</sup>

The draft Regional Spatial Strategy for the South East states that “*Local Development Documents should seek to facilitate an appropriate range of housing opportunities in terms of a mix of housing types, sizes and tenure.*”<sup>2</sup>

The Oxford Local Plan 2001-2016 seeks to achieve a balance mix of dwelling sizes, types and tenures within a site and within a locality in order to maintain and create sustainable communities.<sup>3</sup>

Oxford’s Social Housing SPG<sup>4</sup> indicated that the tenure split of affordable housing should be 70% social rented and 30% shared ownership. In April 2004, the City Council published its Housing Requirements Study<sup>5</sup> which indicated that the tenure split should now be sought at 80% social rented and 20% shared ownership.

### Data analysis

	<b>Proportions completed 2004/2005</b>	<b>Proportions permitted on S106 sites 2004/2005</b>	<b>Total proportions permitted on S106 and non S106 sites 2004/2005</b>
<b>Social Rented</b>	74.1%	65.6%	65.8%
<b>Shared Ownership</b>	25.9%	34.4%	34.2%

### Commentary

Due to the high cost of property in Oxford, the greatest need is for social rented affordable housing, however there is a need for shared ownership housing as well. Shared ownership is more attractive to developers both financially and in their perception of the type occupiers of shared ownership housing compared to occupiers of social rented housing and the impact this might have on the saleability of their market units. The tenure split is often an element that applicants try to negotiate and the success of their negotiations may be apparent in the data above as the tenure split of 70/30 indicated in the SPG has not consistently been permitted during 2004/2005, although completions during 2004/2005 exceed the 70/30 target. Also, in some areas where there is already a high proportion of social rented housing, shared ownership may be more appropriate and this might in turn affect the tenure split.

<sup>1</sup> Paragraph 5, *Planning for Mixed Communities*, ODPM, January 2005

<sup>2</sup> Policy H6, *The South East Plan*, South East England Regional Assembly, January 2005

<sup>3</sup> Policy HS.8, *Oxford Local Plan 2001-2016*, Oxford City Council, December 2005

<sup>4</sup> *Supplementary Planning Guidance on Social Housing*, Oxford City Council, April 2001

<sup>5</sup> *Oxford’s Housing Requirements Study*, Fordham Research, April 2004.



The proportion of social rented overall is slightly greater than the social rented proportion from sites secured by planning obligations. This is due to sites that are built by Registered Social Landlords or the City Council who seek to meet the greatest need which is for social rented accommodation.

The tenure split between social rented and shared ownership will be set out in the Affordable Housing Supplementary Planning Document (SPD), a draft of which is expected by the end of 2005. The tenure split achieved is expected to become closer to the target of 80/20 once the draft SPD is published, however, it may not be until the adoption of the SPD that the target is consistently achieved.

The data above indicates that while completions during 2004/2005 exceed our target of 70/30, permissions during the year do not, which is likely to result in completions over the next year or two that fall short of the 80/20 and even the 70/30 split.

**On target? X**