

New Forest National Park Authority

Infrastructure Funding Statement

Covering the period 1 April 2022 – 31 March 2023

Published December 2023

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1. Introduction

- 1.1 In accordance with the Community Infrastructure Levy Regulations, any authority (including local planning authorities and parish councils) that receives a contribution from development through either the Community Infrastructure Levy or Section 106 planning obligations is required to prepare and publish an Infrastructure Funding Statement.
- 1.2 This report therefore provides a summary of the financial contributions the New Forest National Park Authority has secured through Section 106 legal agreements (including unilateral undertakings) from development for off-site infrastructure works, the delivery of affordable housing and mitigation measures for the internationally protected habitats of the New Forest and Solent coast. **The report covers the period 1 April 2022 – 31 March 2023.**
- 1.3 The information included in the report is updated annually, published on the National Park Authority's website and submitted to Government. This ensures up-to-date information on the amount of developer contributions received from new development and the projects where these contributions have been spent is readily available to local communities and other interested parties.

Section 106 planning obligations and developer contributions

- 1.4 Under Section 106 of the *Town and Country Planning Act 1990*, local planning authorities (including National Park Authorities) can enter into legal obligations with developers to mitigate the impacts of new development. These agreed legal obligations can include both physical on-site measures and financial contributions towards off-site infrastructure provision and mitigation measures.
- 1.5 Planning obligations assist in mitigating the impact of unacceptable development to make it acceptable in planning terms. National planning regulations state that planning obligations may only constitute a reason for granting planning permission if they are:
- necessary to make the development acceptable in planning terms;
 - directly related to the development; and
 - fairly and reasonably related in scale and kind to the development.

- 1.6 These tests are set out as statutory tests in the Community Infrastructure Regulations 2010 (as amended by the 2011 and 2019 Regulations) and as policy tests in the Government's National Planning Policy Framework (NPPF)¹.

New Forest National Park Local Plan (2019)

- 1.7 The [New Forest National Park Local Plan](#) was formally adopted in August 2019. The Local Plan forms a key part of the statutory 'development plan' for the National Park and the policies set out in Table 1 are particularly relevant to this Infrastructure Funding Statement.

¹ Paragraph 57, National Planning Policy Framework (September 2023)

Table 1: Relevant Local Plan policies

Local Plan Policy	Summary
SP5: Nature conservation sites of international importance	Confirms that a contribution to the Authority’s Habitat Mitigation Scheme for the New Forest sites and/or the Solent Recreation Mitigation Partnership’s Scheme (‘Bird Aware Solent’) will enable measures to be put in place to mitigate the recreational impacts of new development.
DP10: Open Space	New development is required to provide new public open space provision. Where this cannot be delivered on site (typically due to the small-scale of development within the National Park) a financial contribution to support off-site provision or enhancements will be sought.
SP27: Affordable Housing Provision	At the discretion of the Authority, financial contributions in lieu of on-site affordable housing provision will be accepted on smaller development sites.
SP38: Infrastructure provision and developer contributions	<p><i>“Development proposals shall make provision for the infrastructure and measures necessary to ensure that the development is acceptable in planning terms. Where appropriate, financial contributions for the provision of off-site infrastructure and measures will be sought.”</i></p> <p>Within the context of development within the New Forest National Park, developer contributions may be required towards highway and transportation works; affordable housing; education provision; recreation provision; and nature conservation mitigation measures.</p>

- 1.8 Further details on the developer contributions sought within the New Forest National Park are set out in the Authority’s adopted [Development Standards SPD](#) (2012), which sets out the level of financial contributions sought from new development towards affordable housing, public open space and transport.
- 1.9 In the context of planning within the New Forest National Park, developer contributions are also required to mitigate the impacts of new residential and visitor accommodation development on the internationally protected habitats of the Solent coast and the New Forest heathlands. Further details of these mitigation schemes can be found in the Authority’s updated [Habitat Mitigation Scheme](#) (2020) and the [Bird Aware Solent Strategy](#).
- 1.10 It is also important to note that alongside local planning policies, the process for seeking developer contributions from new development is guided by national planning policy and guidance. The Government’s National Planning Practice Guidance (NPPG) resource includes a specific section on [‘Planning Obligations’](#) which sets out the national framework for seeking developer contributions.

2. Contributions available at 31 March 2022

2.1 Table 2 (below) sets out the level of developer contributions held by the National Park Authority as at 31 March 2022.

Table 2: Contributions available at 31 March 2022 received in preceding years

Infrastructure / measure	Contributions available at 31 March 2022
Affordable Housing	£832,110
New Forest SPA Habitat Mitigation	£155,590
Solent SPA Habitat Mitigation	Pooled contributions held by the Bird Aware Solent habitat mitigation scheme*
Transport	Pooled contributions held by Hampshire County Council for local transport schemes #
Public open space, sport & recreation	£59,457
TOTAL	£1,047,175

*Solent SPA habitat mitigation contributions are transferred to the Bird Aware Solent mitigation project on a quarterly basis and so are not in the direct control of the National Park Authority.

#Transport contributions are transferred to the local highway authority and so are not in the direct control of the National Park Authority.

2.2 Developer contributions secured through Section 106 agreements in the National Park are legally ring-fenced for specific uses/forms of infrastructure. This means they must be used for the purposes set out in the relevant legal agreement. Unlike funding received through the Community Infrastructure Levy (CIL) – which the National Park Authority does not operate – the priority for the use of received Section 106 contributions is not at the discretion of the Authority.

2.3 It is important to note that other than for the affordable housing and the New Forest SPA Habitat Mitigation contributions, the National Park Authority itself is not directly responsible for the expenditure of the following contributions:

- Solent SPA Habitat Mitigation contributions have been sought since 2015/16 from new residential development within 5.6 kilometres of the Solent's internationally protected sites. Contributions within the 5.6-kilometre catchment area from across the 14 planning authorities in the area are pooled to be spent on the delivery of the 'Bird Aware Solent' habitat mitigation scheme and further details can be found [here](#).
- Although the Authority is the sole statutory planning authority for the National Park area, it is not responsible for highways (or education and social care). The two 'highway authorities' for the National Park area are Hampshire County Council (for the 95% of the land area of the National Park that lies within Hampshire) and Wiltshire Council (for the remaining 5% of the National Park located within the county of Wiltshire). Transport contributions are therefore transferred to the relevant highway authorities to be spent on schemes within the National Park area.
- The National Park Authority does not own or manage any public open space, sport or recreational facilities in the National Park. This responsibility

typically rests with the local town and parish councils in the National Park and therefore contributions received towards open space provision are made available for the relevant town or parish council to draw down on and spend on open space projects in the locality of the new development.

- 2.4 For developer contributions towards affordable housing, it is necessary to build up a fund of pooled contributions to enable the delivery of off-site affordable housing. Affordable housing contributions have previously been spent on the delivery of two affordable dwellings for local people at Bransgore.
- 2.5 Table 2 confirms that the total of developer contributions held by the National Park Authority as at 31 March 2022 stood at just over £1 million. Of the total contributions held at the start of the Infrastructure Funding Statement reporting period, it is also important to note that the habitat mitigation contributions for the Solent coast and New Forest habitats were earmarked for specific projects. Both the New Forest and Solent mitigation schemes have published strategies setting out future spending priorities. The Solent contributions are pooled from development across the sub-region to fund the implementation of the Bird Aware Solent Mitigation Strategy, which is subject to separate annual reporting. The implementation of mitigation measures funded by the financial contributions towards the New Forest Habitat Mitigation Scheme (2020) is overseen by a Steering Group that meets annually to agree priorities for the following year.

3. Contributions received in 2022 – 2023

Table 3 – Contributions received in 2022 – 2023

Infrastructure / measure	Contributions received in 2022 – 2023
Affordable Housing	£0
New Forest SPA Habitat Mitigation	£121,923
Solent SPA Habitat Mitigation	£14,942
Transport	£0
Public open space, sport & recreation	£0
TOTAL	£136,865

- 3.1 As shown in Table 3, during 2022 – 2023, the National Park Authority received just under £137,000 in financial contributions from new development, secured through either Section 106 agreements or unilateral undertakings.
- 3.2 The scale of developer contributions received by the National Park Authority in 2022 – 2023 was lower than the preceding reporting year. Developer contributions in the reporting year were received from a limited number of windfall developments and several temporary campsites (which are required to address impacts under the requirements of the Habitats Regulations for legal compliance). None of the adopted New Forest National Park Local Plan (2019) housing site allocations reached their triggers for payment of contributions in the 2022 – 2023 reporting year. The respective triggers for payment are expected to be reached in future reporting years, which will result in an increase in financial contributions towards necessary supporting infrastructure.
- 3.3 Developer contributions towards habitat mitigation measures to address recreational pressures for both the Solent coast and the New Forest Special Protection Area (SPA) and Special Area of Conservation (SAC) are required to ensure legal compliance. They are therefore sought from all net new dwellings and visitor accommodation permitted in the National Park, unlike other forms of contributions where various site size thresholds apply. During 2022 – 2023, habitat mitigation contributions towards the New Forest’s internationally designated sites were also sought from seasonal campsite uses under the requirements for the Habitats Regulations. In addition to the campsite payments, the conversion of the Carlton House employment site in Netley Marsh to residential use under national permitted development rights for 29 net new units of residential accommodation contributed £106,169 towards New Forest habitat mitigation to ensure the recreational impacts arising from the development on the New Forest’s internationally designated sites are mitigated.
- 3.4 In the 2022 – 2023 reporting year, no financial contributions were received towards affordable housing provision, transport or public open space. This reflects the small scale nature of new development in the National Park over the reporting period; and the fact that the largest development at Netley Marsh (29 units) was delivered under national permitted development rights created by the Government through which developer contributions towards these forms of infrastructure cannot be legally sought.

Contributions spent in 2022 – 2023

Table 4 – Contributions spent in 2022 – 2023

Infrastructure / measure	Contributions spent in 2022 - 2023
Affordable Housing	£1,200
New Forest SPA Habitat Mitigation	£20,111
Solent SPA Habitat Mitigation	£14,942 transferred to the Bird Aware Solent habitat mitigation scheme
Transport	£0
Public open space, sport & recreation	£0
TOTAL	£36,253

- 4.1 Table 4 illustrates that during 2022 – 2023 a total of £36,253 of contributions were spent on infrastructure or habitat mitigation measures within the National Park. This includes spend of contributions received in previous years – i.e. some of the contributions released in 2022 – 2023 were received by the National Park Authority in preceding reporting periods.

Affordable Housing

- 4.2 £1,200 in received developer contributions towards affordable housing was spent as part of the pre-commencement work for the two affordable dwellings at Burley. The scheme – which has full planning permission – is based on the model established by the National Park Authority for the two affordable dwellings completed in Bransgore, whereby financial contributions towards affordable housing are pooled and spent on dwellings managed by the National Park Authority for local people in identified affordable housing need.

New Forest SPA Habitat Mitigation

- 4.3 The spending of received financial contributions towards mitigating the impacts of increased recreational pressures associated with new development is done in accordance with the Authority’s adopted habitat mitigation scheme (2020). The scheme is overseen by a steering group comprising representatives from the National Park Authority, Natural England, the RSPB, the Hampshire & Isle of Wight Wildlife Trust and New Forest District Council. During 2022 – 2023 a total of £20,111 was spent on mitigation measures, including the following. The Authority’s Habitat Mitigation Scheme Annual Implementation Report for 2023 sets out details of all the expenditure and the developer contributions received.
- Seasonal Rangers: Habitat mitigation contributions have been used for the seasonal ranger resource working in the New Forest designated nature conservation sites. Seasonal rangers were employed during the 2022-23 reporting period at a total cost of £15,112. Additional ranger provision has been identified as being key to addressing increased recreational pressures associated with planned new development (housing and other forms of overnight accommodation, including campsites).

- Communications: An important mitigation measure is the regular delivery of interpretation information, publications, website and social media development - £5,000.

Solent SPA Habitat Mitigation

- 4.4 The Solent Recreation Mitigation Strategy [annual reports](#) provide more detail on the spending of the contributions received. The 2023 Annual Report sets out the value of the developer contributions received by the partnership in 2022 – 2023, and details of all expenditure.
- 4.5 During 2022/23, planning permission was granted for 2,465 net new dwellings which were assessed as requiring mitigation for recreational impacts on the Solent; and the total developer contributions received by the Partnership between April 2022 and March 2023 amounted to £1,725,553 (i.e. nearly £1.73 million). This includes £14,942 from the development of 29 dwellings at the Carlton House site in Netley Marsh site in the National Park, which was completed under national permitted development rights. Set out below is an overview of the mitigation projects supported in the 2022 - 23 reporting year through the use of pooled developer contributions. Further details can be found in Solent Recreation Mitigation Strategy Annual Report 2023.
- Team of full time and seasonal rangers: The key mitigation measure is a team of rangers who cover the coast. The rangers aim to reduce bird disturbance by helping people to better understand the importance of the over-wintering birds and their vulnerability to disturbance. They advise people on how small changes in their behaviour can be hugely beneficial to the birds. A team of 5 rangers and 2 seasonal rangers was employed in 2022/23. The ranger team completed 685 site visits and engaged with a total of 7,718 people whilst out on the coast - £287,000
 - Monitoring: Monitoring the effectiveness of the mitigation measures is vital. The focus for monitoring this year was on the 5 Year Review of the Bird Aware Solent mitigation strategy. The review was undertaken by the specialist consultants Footprint Ecology and concluded, “...*the level of mitigation that has been achieved by Bird Aware Solent and partners and the total for the 5 years under review are impressive. The Project has received national recognition and the dialogue with stakeholders indicates the Project is respected and perceived to be making a difference, albeit with some areas where potential improvements or change could be made in the future.*” The conclusions will be reviewed by the Partnership and considered within the next reporting period as part of the planned Strategy and Financial reviews and through a 5 year forward planning exercise. In addition to the 5 Year Review, the Monitoring Officer has overseen smaller scale monitoring work, monitoring the effectiveness of the site-specific projects and helping create bespoke monitoring programmes for smaller scale site interventions. This helps decision making be more evidence based and build a credible picture of what types of interventions are most effective under which circumstances - £154,921 (£117,782 on monitoring consultancy advice and £37,139 to employ a Monitoring Officer).

- Site Specific Projects: From April 2020, the Partnership has set aside £2 million every 5 years to fund series of capital projects designed to further the aims of the strategy through the provision of visitor management techniques, enhanced bird habitats, enhanced strategic recreational space or public engagement and education initiatives. Owing to the far-reaching impacts of COVID, coupled with other unforeseen impacts such as a seawall breach at one site, the supported projects have been slower to materialise than originally expected. Work is now underway on several with some due to be completed shortly - £400,000
- Dog Initiatives Post: The Partnership employs a 'Dog Initiatives Post' in response to the popularity of the Solent Coast for dog walkers. The Partnership also recruited a dedicated dog focused seasonal Ranger for 19 months from September 2022. This role was instrumental in supporting the wider team for the 2022/23 winter season, with a system established whereby rangers could request additional guidance and support from the Dog Initiatives staff at sites where they were experiencing issues with dogs, or encountering large numbers of dogwalkers. The Coast & Country Canines initiative was launched with dedicated branding, website and social media as planned. It was launched with a suite of resources including featured dog walks, training guides, blogs and other dog related advice. The branding, theme and imagery are dog focused while using elements from the Bird Aware brand so that it feels like a sister project, catering to both audiences - £42,000

4.6 Developer contributions in 2022/23 were also spent on the Partnership Coordination Officer post (£51,485) and a Brand & Communications Officer (£45,455). The partnership is also investing a proportion of the developer contributions received in order to create an investment pot which will fund the mitigation measures in-perpetuity.

Transport

4.7 Following changes in national planning policy, the National Park Authority is only able to negotiate financial contributions towards transport infrastructure from larger developments. Given the typical profile of development in the protected landscape of the New Forest National Park, transport contributions are not usually triggered by the vast majority of new developments. In the 2022 – 2023 the National Park Authority did not receive any transport contributions.

Public open space, sport and recreation provision

4.8 The National Park Authority liaises with town and parish councils regarding the spending of received contributions towards public open space, sport and recreation facilities. As with transport contributions, the Authority is only able to seek developer contributions towards public open space, sport and recreation provision/enhancements from certain developments. During 2021 – 2022 no public open space contributions were either received or released.

- 4.9 During the 2021 – 22 reporting year the Authority resolved to grant planning permission on several of the site allocations in the adopted New Forest National Park Local Plan (2019). The site allocations at Whartons Lane, Ashurst and Church Lane, Sway are both due to include new on-site public open space provision for the benefits of new residents and the existing community.

4. Contributions available for future years

Table 5: Contributions available as at 31 March 2023

Infrastructure / measure	Contributions available at 31 March 2023
Affordable Housing	£830,910
New Forest SPA Habitat Mitigation	£257,402
Solent SPA Habitat Mitigation	Pooled contributions held by the Bird Aware Solent habitat mitigation scheme
Transport	Pooled contributions held by Hampshire County Council for local transport schemes
Public open space, sport & recreation	£59,475
TOTAL	£1,147,787

5.1 During the 2022 – 2023 year of this Infrastructure Funding Statement, the National Park Authority received **£136,865** in developer contributions (Table 3); and released/spent **£36,253** towards local infrastructure projects and habitat mitigation measures (Table 4). The total level of contributions held by the National Park Authority therefore rose compared to the position at 31 March 2022 (see Table 2). Table 5 sets out what was held by the National Park Authority at the end of March 2023.

5.2 As well as reporting on the developer contributions received and spent between April 2022 – March 2023, the Infrastructure Funding Statement is required to set out the priorities for spending in the future. These are set out below for the main areas of infrastructure provision sought in the National Park.

Affordable housing

5.3 The delivery of affordable housing for local people in identified housing need is a key element of the adopted Local Plan and accords with the Authority’s statutory duty to foster the socio-economic wellbeing of local communities living within the National Park. Successive development plans dating back prior to the designation of the New Forest National Park in 2005 have required new development to support the delivery of affordable housing, through either on-site provision or financial contributions to enable off-site delivery.

5.4 Received developer contributions towards affordable housing have previously been used to fund the delivery of new affordable housing in the National Park. This has included the release of funds to New Forest Villages Housing Association to support new provision at Foxhills in Ashurst; and the use of contributions to fund the construction of two new affordable homes at Bransgore (application reference 14/00664).

5.5 Following the successful delivery of the affordable dwellings at Bransgore in September 2018, the Authority granted planning permission for two affordable dwellings on land adjacent to Park Lodge, Burley (application reference 18/00517 – see images below). The intention is to use received affordable housing contributions to support this development. The Authority is open to

working with developers on sites to increase the delivery of affordable housing and this may include the release of pooled affordable housing contributions.



New Forest SPA Habitat Mitigation

- 5.6 The Authority has sought developer contributions towards a package of measures to mitigate the impacts of increased recreational pressures associated with new development (residential and visitor accommodation) on the New Forest SPA and SAC since 2012. In July 2020 the Authority’s revised Habitat Mitigation Scheme SPD was formally adopted following public consultation. The revised scheme sets out the package of mitigation measures that will be funded by developer contributions through the Local Plan period to 2036 and is supported by Natural England. It sets out the overall proportions the funds will be spent on – details can be seen at [Development Impacts on Protected Areas - New Forest National Park Authority \(newforestnpa.gov.uk\)](https://www.newforestnpa.gov.uk/development-impacts-on-protected-areas).
- 5.7 Ultimately, as the ‘competent authority’ under the Habitats Regulations, the decision on what mitigation measures to prioritise rests with the National Park Authority. However, the implementation of the Habitat Mitigation Scheme is also overseen by a Steering Group comprising representatives of the National Park Authority, Natural England, the RSPB, the Hampshire & Isle of Wight Wildlife Trust and New Forest District Council. The Steering Group typically meets annually to review the mitigation measures implemented in the preceding year; and to agree priorities for the next year.
- 5.8 The following broad mitigation projects have been agreed for the 2023 – 2024 year to address the potential impacts of increased recreational pressures from new development on the New Forest designated sites.
- Communication activities to promote key messages: To include key messages in new publications, through social media channels and on the website. Estimated funding - £5,500 (an increase from the previous year).
 - Seasonal rangers: One year-round mitigation ranger plus one seasonal ranger to be employed for the spring – summer season in 2024. The full-time mitigation ranger cost for 2023 – 24 is £28,000 and the seasonal ranger is £14,000.
 - Signage on alternative recreational routes to help deflect recreational pressures from the internationally designated sites - £19,000.

Solent SPA Habitat Mitigation

- 5.9 A budget has been set for 2023/24 totalling £2,242,000 to fund the implementation of mitigation measures and associated costs including the part-time Partnership Manager. Further details are available in Appendix 2 of the Annual Report 2023 and the headlines are set out below. Please note, this does not list the full range of mitigation measures due to be funded in 2023/24.
- Team of full time and seasonal rangers: The ranger team remain a core part of the mitigation package and the Bird Aware Solent rangers complement the work undertaken by other rangers along the Solent coast (including those employed by Hampshire County Council, the Wildlife Trust and others) - £287,000
 - Dog Initiatives: The implementation of initiatives to encourage responsible dog walking on the coast to avoiding bird disturbance. This includes the employment of a full time 'Dog Initiatives Officer' (£42,000 per annum), which recognises the importance of engaging dog walkers on the Solent coast. During 2023/24 work will focus on further growing Coast & Country Canines and nurturing a supportive network for the dog community - £52,000
 - Campaigns and Engagement: To include the employment of a full time Campaigns & Engagement Officer role (£50,000). In 2023/24 this work will include the use of targeted campaigns to further grow the reputation and sphere of influence of the Bird Aware Solent scheme, both locally and nationally. Work will also focus on the creation of further Codes of Conduct for specific user groups - £60,000
 - Monitoring: Learning from the results of the 5 Year Review and monitoring to make resource allocation decisions more evidence led. This includes funding for continued consultancy support on monitoring - £60,000
 - Site Specific Projects: A total of £2 million is set aside over a number of years to fund capital projects designed to further the aims of the strategy through the provision of visitor management techniques, enhanced bird habitats, enhanced strategic recreational space or public engagement and education initiatives - £400,000

Public open space, sport and recreational facilities

- 5.10 In accordance with Policy DP10 of the adopted National Park Local Plan (2019), new residential development is required to either provide on-site open space provision, or financially contribute towards off-site provision and/or enhancement in the locality of the development.
- 5.11 The developer contributions received by the Authority are made available for local town and parish councils. Over the years, the Authority has released over £275,000 towards local open space infrastructure, including the wildplay projects at Stanford Rise, Sway; Clare Lodge, Bransgore and Whartons Lane, Ashurst; and new play equipment at the Coles Mead recreation ground, Lyndhurst; and the Highwood Road play area in Brockenhurst.

5.12 The Authority will continue to make the received open space contributions available for the relevant town and parish councils to support the delivery of costed open space enhancement. The contributions are linked to the locality of the development.

6. Section 106 Monitoring Fees received 2022 – 2023

6.1 The Community Infrastructure Levy (Amendment) (England) (No.2) Regulations 2019 enable local planning authorities to charge a monitoring fee to cover the cost of the monitoring and reporting on delivery of the Section 106 obligation. Monitoring fees can be used to monitor and report on any type of planning obligation, for the lifetime of that obligation.

6.2 The regulations allow monitoring fees to be established using a number of options. However, in all cases, monitoring fees must be proportionate and reasonable and reflect the actual cost of monitoring. Local planning authorities are required to report on monitoring fees in their Infrastructure Funding Statements.

6.3 National Park Authority members approved the introduction of Section 106 monitoring fees (as enabled by the relevant Regulations) in December 2019. The monitoring fees introduced in 1 January 2020 and therefore applicable across this reporting period of April 2022 – March 2023 are set out below.

	Band 1: 1-5 dwellings or up to 1ha of land	Band 2: 6-10 dwellings or up to 3ha of land	Band 3: 11-49 dwellings or up to 10ha of land	Band 4: 50+ dwellings or more than 10ha of land
Percentage increase	0%	20%	40%	80%
Monitoring fee per covenant	£284	£284 x 1.2 = £340.80	£284 x 1.4 = £397.60	£284 x 1.8 = £511.20

6.4 In the Infrastructure Funding Statement reporting period of April 2022 – March 2023 the Authority received **£4,000.28** in Section 106 monitoring fees.