

**Sustainability Appraisal / Strategic Environmental Assessment**

**Project Brief and Invitation to Quote NFNPA – 0068**

**April 2025**

1. **Introduction**
	1. The New Forest National Park Authority invites quotes from suitably experienced consultants to undertake a Sustainability Appraisal (SA) and Strategic Environmental Assessment (SEA) which will shape and support the review of the Authority’s Local Plan. These assessments are required by the *Planning & Compulsory Purchase Act 2004* and the European Directive 2001/42/EC (the Strategic Environmental Assessment or SEA Directive), with further guidance provided in the National Planning Practice Guidance resource on [Strategic environmental assessment and sustainability appraisal - GOV.UK](https://www.gov.uk/guidance/strategic-environmental-assessment-and-sustainability-appraisal).

1.2 The project brief outlines what the National Park Authority expects of its Sustainability Appraisal / SEA and the requirements for quote proposals.

1. **Background**
	1. The New Forest National Park Authority adopted its current Local Plan in August 2019 and it forms the central element of the statutory ‘development plan’ for the National Park. The planning system plays a key role in the delivery of the two statutory National Park purposes (and related socio-economic duty) and the adopted Local Plan has provided a clear planning policy framework for the New Forest National Park over the last 5 and a half years.
	2. In 2024 the members of the New Foresty National Park Local Plan resolved that a focused update and review of the Local Plan was required to ensure it remained consistent with the latest national planning policies, guidance and legislation. For example, there have been several iterations of the National Planning Policy Framework (NPPF) since the Local Plan was adopted.
	3. As part of the current review of the New Forest National Park Local Plan a series of important evidence base studies have been commissioned, all of which are due to conclude by Spring/early Summer 2025. These include a Strategic Housing Market Area Assessment for the New Forest National Park (and surrounding areas within New Forest District Council’s planning remit); an Economic Needs Assessment covering the National Park; a Gypsy & Traveller Accommodation Assessment; and we are also in the process of commissioning a Habitat Regulations Assessment/Appropriate Assessment.
	4. We undertook an initial Regulation 18 consultation on the ‘Direction of Travel’ for the Local Plan review in February – March 2025 with further details available at [New Forest National Park Local Plan Review 2025 - New Forest National Park Authority](https://www.newforestnpa.gov.uk/planning/local-plan/new-forest-national-park-local-plan-review-2025/). This initial Regulation 18 consultation invited feedback on the scope of the review of the local planning policies for the National Park area. We are in the process of considering the representations made during this consultation. Our Local Development Scheme (LDS, 2024 – see [Local Development Scheme - New Forest National Park Authority](https://www.newforestnpa.gov.uk/documents/planning/local-development-scheme/)) sets out a timetable for further consultation at Regulation 18 on an initial draft Local Plan in late 2025, followed by Regulation 19 consultation on the Submission draft Local Plan in Summer 2026.

**3. The Study Area**

3.1 The study area is the whole of the New Forest National Park. The 220 square mile National Park was designated in 2005 and includes land within the counties of Hampshire and Wiltshire. As with all of the English and Welsh National Parks, the New Forest has two statutory purposes:

* To conserve and enhance the natural beauty, wildlife and cultural heritage of the Park; and
* To promote opportunities for the understanding and enjoyment of the special qualities of the Park by the public

3.2 Working in partnership with other organisations, it is also the Authority's duty to seek to foster the economic and social well-being of the local communities within the New Forest. National Parks are recognised within the NPPF (December 2024) as having the highest level of protection in relation to landscape and scenic beauty (paragraph 189) and are identified as areas of restraint within paragraph 11 and footnote 7 of the NPPF (December 2024). National policy also recognises that National Parks are not appropriate locations for major development.

3.3 56% of the New Forest National Park is designated as being of national or international importance for nature conservation – the highest proportion of any local planning authority’s area in the country. It is also a living-working landscape, with a resident population of circa 34,500 people which makes it one of the most densely populated National Parks in the country. The New Forest has a variety of settlements, with no villages larger than 3,000 people; and the National Park is home to around 2,500 local businesses. The National Park Authority deals with around 900 planning applications per annum.

3.4 With the recent changes to national policy through the revised NPPF; and the revised Objectively Assessed Housing Need for the New Forest area established through the Government’s ‘standard method’, the review will consider the merits of continuing the approach of the current Local Plan (2019) of identifying a limited number of site allocations to meet identified needs. The National Park Authority has recently undertaken a ‘call for sites’ process and the results of this will feed into the review of the Local Plan.

**4. Project Description**

4.1 The National Park Authority is looking to engage consultants to undertake stages A, B, C and D of the Sustainability Appraisal and SEA process set out in the NPPG advice on Sustainability Appraisal and Strategic Environmental Appraisal (SEA) at [Strategic environmental assessment and sustainability appraisal - GOV.UK](https://www.gov.uk/guidance/strategic-environmental-assessment-and-sustainability-appraisal#sustainability-appraisal-requirements-for-local-plans-and-spatial-development-strategies) and best practice. This involves the following key stages.

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| **Stage A: Setting the context and objectives, establishing the baseline and deciding on the scope**1. Identify other relevant policies, plans & programmes & sustainability objectives
2. Collect baseline information
3. Identify sustainability issues and problems
4. Develop the sustainability appraisal framework
5. Consult the consultation bodies on the scope of the sustainability appraisal
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4.2 The **Sustainability Appraisal Scoping Report** will need to be consulted on with the three statutory consultation bodies (and any other organisations considered necessary). After consultation, any comments received will need to be reviewed and the Scoping Report amended accordingly.

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| **Stage B: Developing and refining alternatives and assessing effects**1. Test the Local Plan objectives against the sustainability appraisal framework
2. Develop the Local Plan options including reasonable alternatives
3. Evaluate the likely effects of the Local Plan and alternatives
4. Consider ways of mitigating adverse effects and maximising beneficial effects
5. Propose measures to monitor the significant effects of implementing the Local Plan
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4.3 The National Park Authority intends to publish a non-statutory version of the draft Local Plan in November 2025 for public consultation and a **draft Sustainability Appraisal Report** will be published alongside it. This will include an assessment of the alternative policy options.

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| **Stage C: Prepare the Sustainability Appraisal Report** |

4.4 In line with Government guidance in the NPPG, the **Sustainability Appraisal Report** should focus on the likely significant effects of the Local Plan and focus on the policies that require a more detailed analysis. The Sustainability Appraisal Report should be accompanied by a Non-Technical Summary.

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| **Stage D: Seek representations on the sustainability appraisal report from consultation bodies and the public** |

4.5 The Authority intends to publish its Regulation 19 Submission draft Local Plan in Summer 2026 and at this stage the **Sustainability Appraisal Report** of the Plan must also be published (including a Non-Technical Summary) and ultimately then submitted for independent examination.

**5. Relevant Studies**

5.1 There are several published documents which will be of relevance and assistance to the production of the Sustainability Appraisal and SEA for the revised Local Plan. We have undertaken Sustainability Appraisal and SEA work for many years and relevant existing assessments and reports include:

* New Forest National Park Local Plan Sustainability Appraisal Report (NFNPA, 2018) – available on request
* Sustainability Appraisal for the New Forest National Park Partnership Plan 2022 – 2027 (NFNPA, [About the Partnership Plan - New Forest National Park Authority](https://www.newforestnpa.gov.uk/conservation/partnership-plan/about-the-partnership-plan/))
* [State of the Park Report - New Forest National Park Authority](https://www.newforestnpa.gov.uk/about-us/state-park-report/) (2019)

**6. Notes on the format and status of the data**

6.1 The report should be provided in a format that can be uploaded onto the National Park Authority’s website, preferably in PDF.

6.2 The use of the Authority’s Ordnance Survey mapping, or data derived from it, will be subject to the signing of a Contractor’s Licence as provided under the Public Sector Mapping Agreement.

**7. Final Reports**

7.1 At each stage of the process a draft version of the relevant report should be submitted in confidence to the Authority prior to completion of the final report. Once the final draft has been approved the Authority will require:

* 2 paper copies of each final report, including any Executive Summary or Non-Technical Summary; and
* Electronic copies, in Word and PDF format.

7.2 The appointed consultants may also be required to give evidence on behalf of the National Park Authority at the Local Plan Examination in Public and we therefore request hourly/daily rates to undertake this potential work.

**8. Timescales**

8.1 The Authority must produce the Sustainability Appraisal to ensure the timely delivery of the Local Plan. The proposed project timetable is set out below.

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| **Date / Deadline** | **Stage** | **Who by** |
| 30 April 2025  | Deadline for tenders to be submitted  | Consultants  |
| 2 May 2025  | Consultants appointed  | NFNPA |
| 8 – 9 May 2025 | Inception meeting held at NFNPA offices, Lymington  | NFNPA / Consultant  |
| Mid-May – Mid-June 2025 | Stage A work – Production of SA Scoping Report  | Consultant  |
| Mid-June – Mid-July 2025  | SA Scoping Report published for consultation (5 weeks) | NFNPA |
| Mid-July 2025 – Mid August 2025 | Review SA Scoping Report comments and amend report  | Consultant  |
| Mid-August – Late September 2025 | Assess policy options against agreed SA Objectives and produce Stage B SA Report  | Consultant  |
| November 2025 | Draft Local Plan and Stage B SA Report published for consultation  | NFNPA/Consultant  |
| July 2026 | Publication of Submission draft Local Plan and Stage C SA Report  | NFNPA/Consultant |
| December 2026 | Submission of Local Plan to the Secretary of State (with Stage D final SA Report) | NFNPA/Consultant  |
| April – June 2027 | Local Plan Examination hearings  |  |
| November 2027 | Target for adoption of Local Plan  |  |

8.2 It is expected that at least two update meetings will be held during the course of the Sustainability Appraisal preparation. It will also be necessary to provide regular updates on the Assessment’s progress by email. The Sustainability Appraisal / SEA is an iterative process and will require on-going communication with the Authority throughout this process.

8.3 The final timetable for the project will be reviewed if necessary and agreed between the Authority and the successful consultant.

**9. The Tender Proposal**

9.1 Consultants tendering for this contract should include in their proposals:

* An outline of their approach to the work which should meet the requirements of the relevant guidance, including the NPPG;
* A programme and timetable for the undertaking of the assessment reflecting the target dates listed above;
* Details of the consultancy’s experience in the area of Sustainability Appraisal / SEA, together with two contacts for references relevant to the study;
* Details of the qualifications and experience of the team who would be undertaking the project;
* Confirmation that undertaking this project would not give rise to conflicts of interest;
* Full details of the pricing structure to be applied to the work. The pricing structure should show costs for each of the major elements in this study, including expected time spent on the work, personnel involved, rates charged and limits applied to expenses; and
* Particulars of public liability and professional indemnity insurances. Public Liability Insurance is required, with a limit of indemnity of not less than £1,000,000 (one million pounds) per claim or series of claims. In addition, the National Park Authority require the appointed consultants to have Professional Indemnity Insurance with a limit of indemnity of not less than £500,000 (five hundred thousand pounds) per claim or series of claims

9.2 Fixed price tenders should be all inclusive with VAT charges show separately. Please note that the anticipated budget from this work is in the region of £10,000 - £15,000.

9.3 All submissions must be made via our e-Procurement portal [In-tend](https://in-tendhost.co.uk/newforestnpa/aspx/Home) and must be submitted by **12 noon on Wednesday 30 April 2025.**

9.4 The contract will be awarded on the basis of the criteria including (i) price; (ii) relevant experience; (iii) understanding of the brief. While cost is obviously an important consideration for the Authority, the contract will not necessarily be awarded to the lowest price. The overall objective will be to appoint the consultant that offers the best overall value for money.

***In case of content query, please contact:***

David Illsley

Interim Head of Planning & Place

New Forest National Park Authority

david.illsley@newforestnpa.gov.uk

Direct Line: 01590 646672

***For queries relating to the procurement process or any issues with our e-Procurement portal, In-tend, please contact:***

Tom Knott

Finance and Performance Officer

New Forest National Park Authority

tender@newforestnpa.gov.uk

Direct Line: 01590 646678

**10. Contract**

10.1 The contract will be let on a fixed price basis including all appropriate expenses and costs.

10.2 All submissions are required to comply with the New Forest National Park Authority ‘Standard Conditions of Contract for Services’ (attached) which will be used to draw up the contract with the winning contractor.

 

10.3 Payment will be made in five stages: 20% on receipt of the final report at each of Stages A to D and the final 20% upon the completion of the Post Adoption Statement, each to the satisfaction of the National Park Authority.

10.4 The copyright of the final reports and any appendices or other supporting information / outputs (including associated databases) will reside with the New Forest National Park Authority.

10.5 The Authority reserves the right to withdraw this contract opportunity without notice and will not be liable for any costs incurred by suppliers during any stage of the process

**11. Project Management**

11.1 Initial contact should be made with:

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11.2 Please note that to ensure fair and open competition, all substantive responses to any questions raised by interested suppliers will be made available to all other suppliers where appropriate. Any such clarifications will be posted on our In-tend portal and you will receive email notification to make you aware of this (you must be registered on the site in order to receive these).