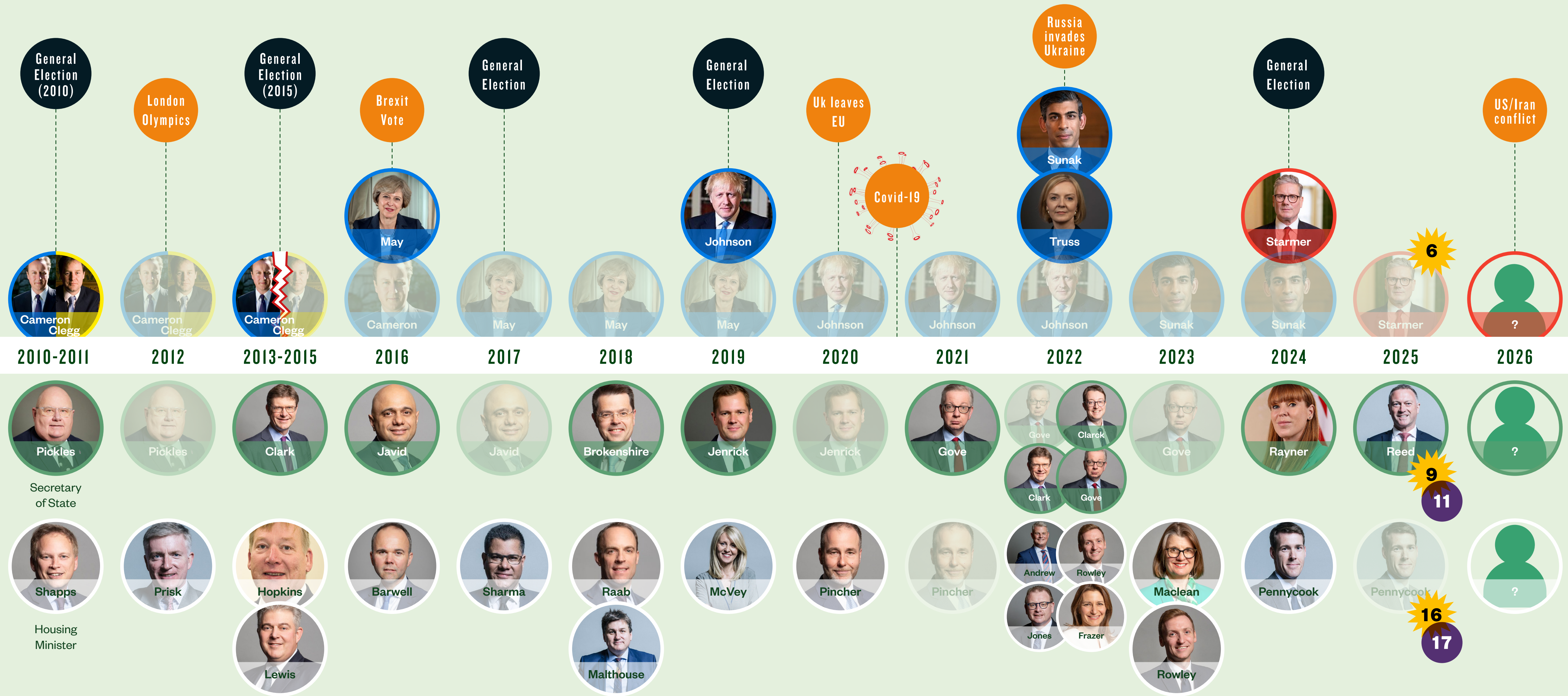


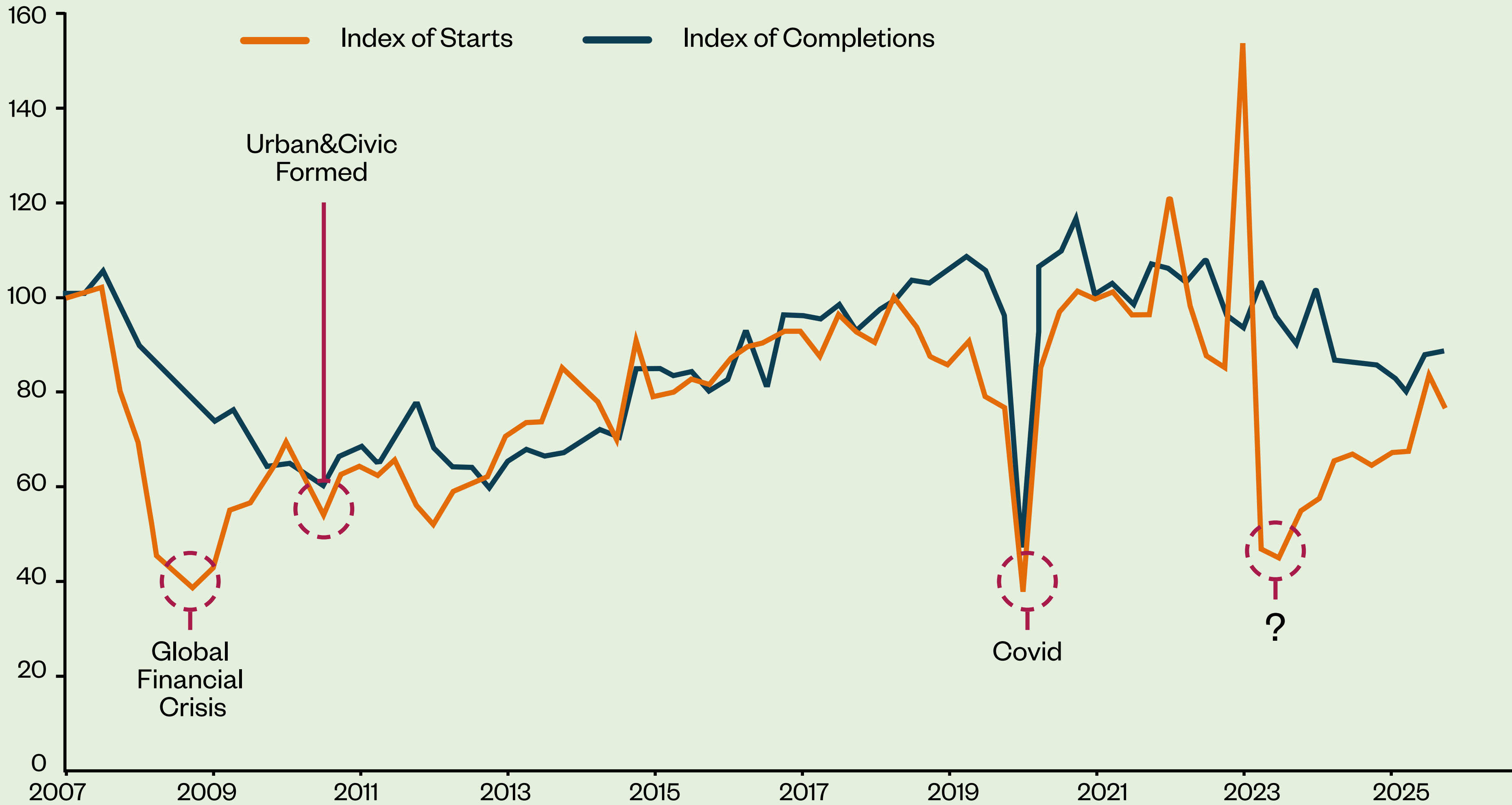


Uncertainty: 16 years of near continuous political change



So... what does that look like for housing starts and completions?

Quarterly index of new dwelling starts and completions (Q1 2007- Q1 2026)



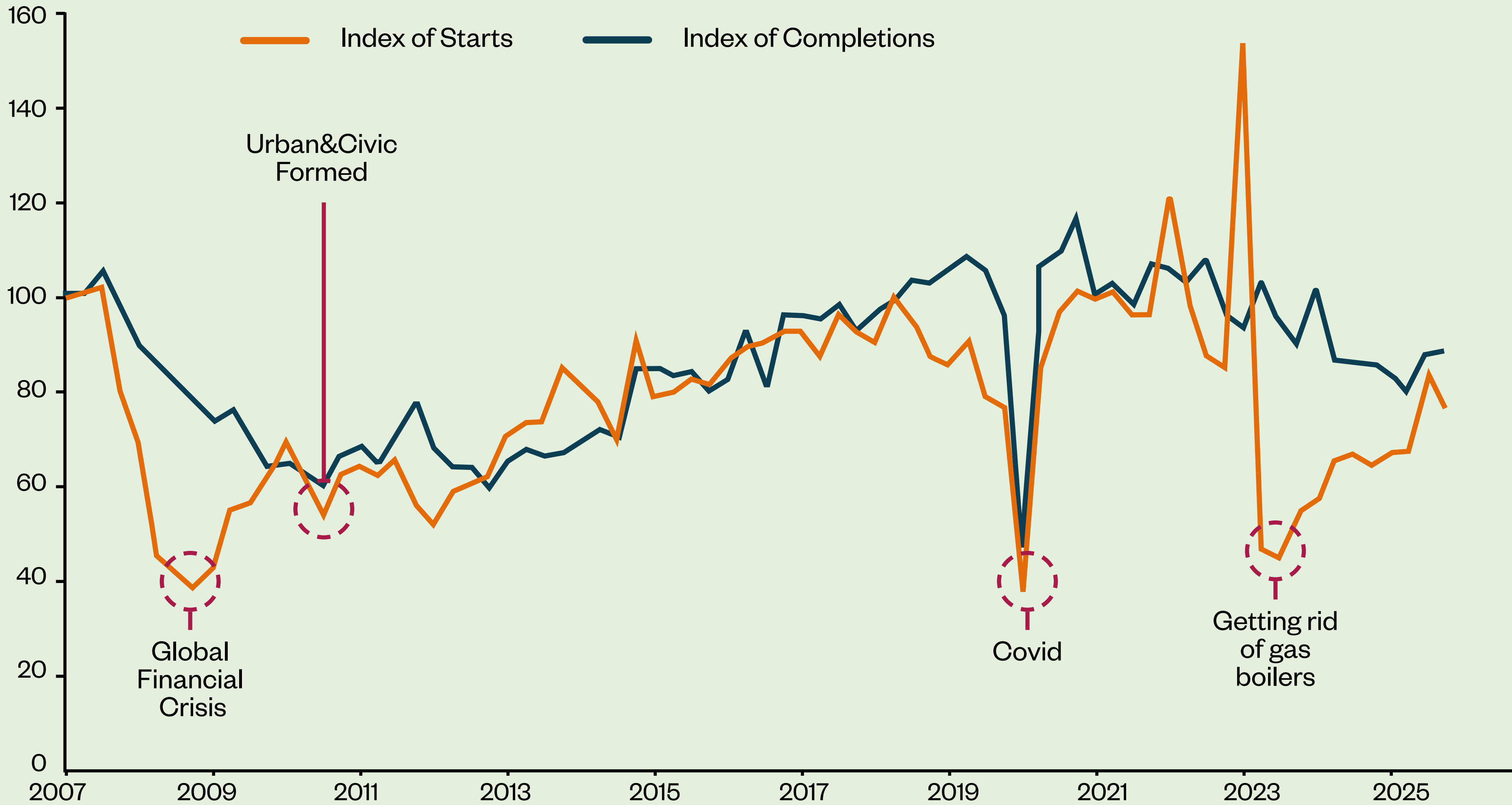
**Population increase
in England:
14%
2007 to date**

**Annual average
starts 2007 to date:
142,896**

**Starts, last
12 months:
130,170**

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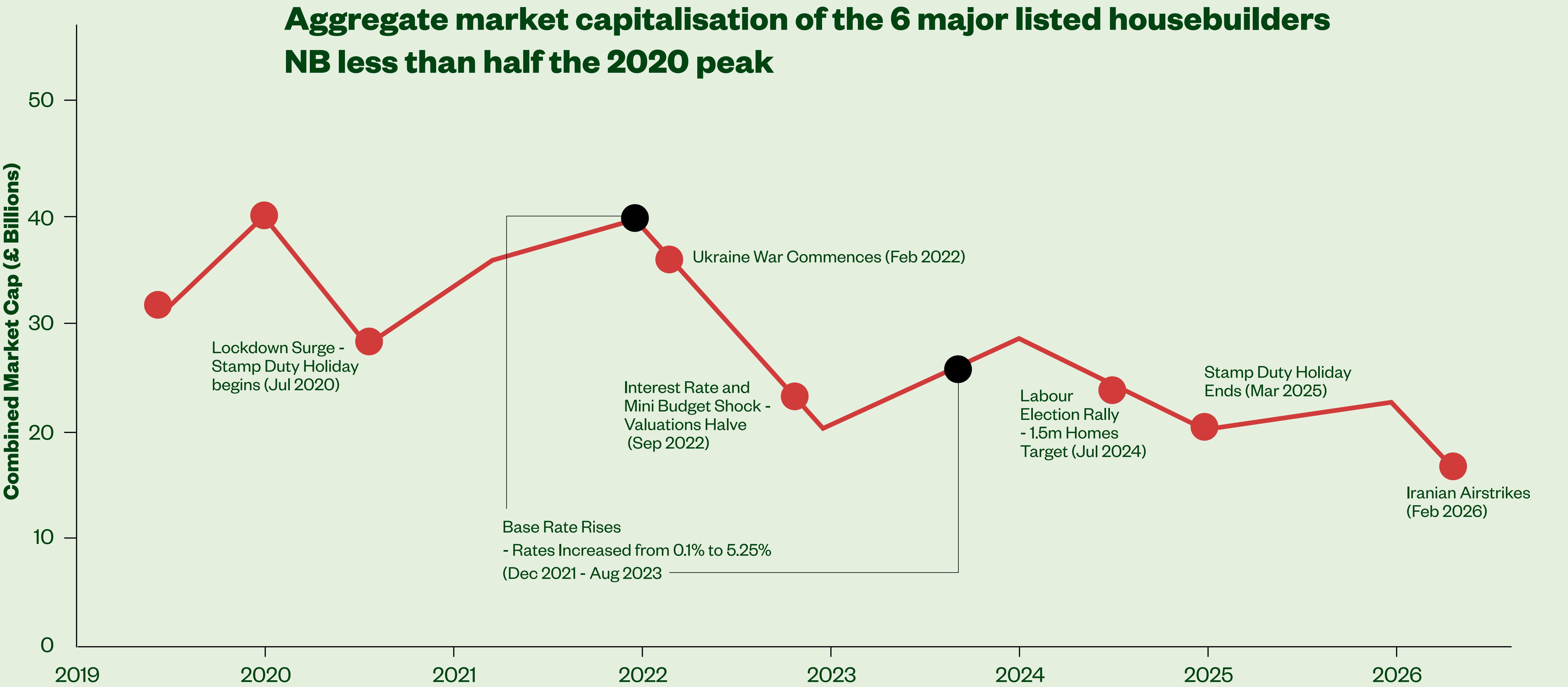


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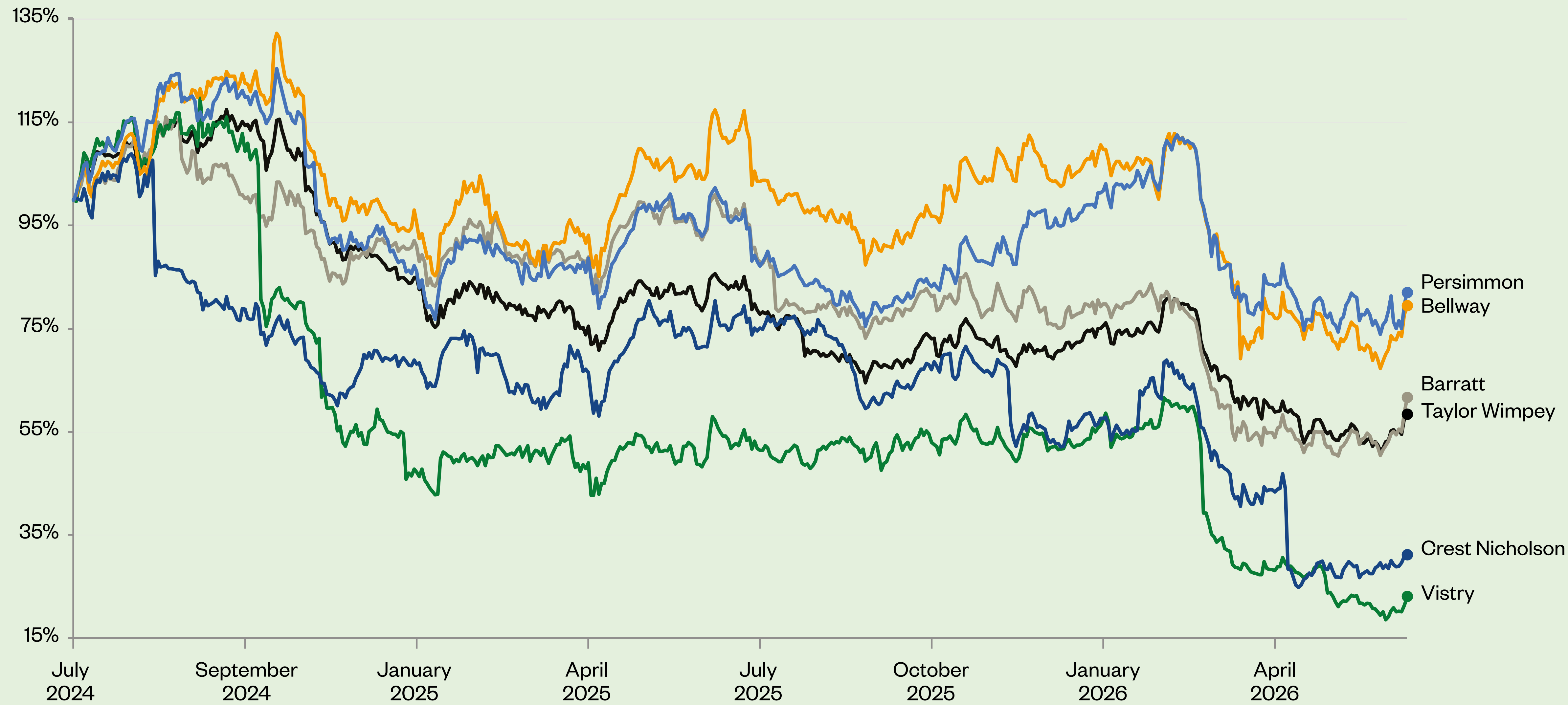
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The highs and lows of being a housebuilder

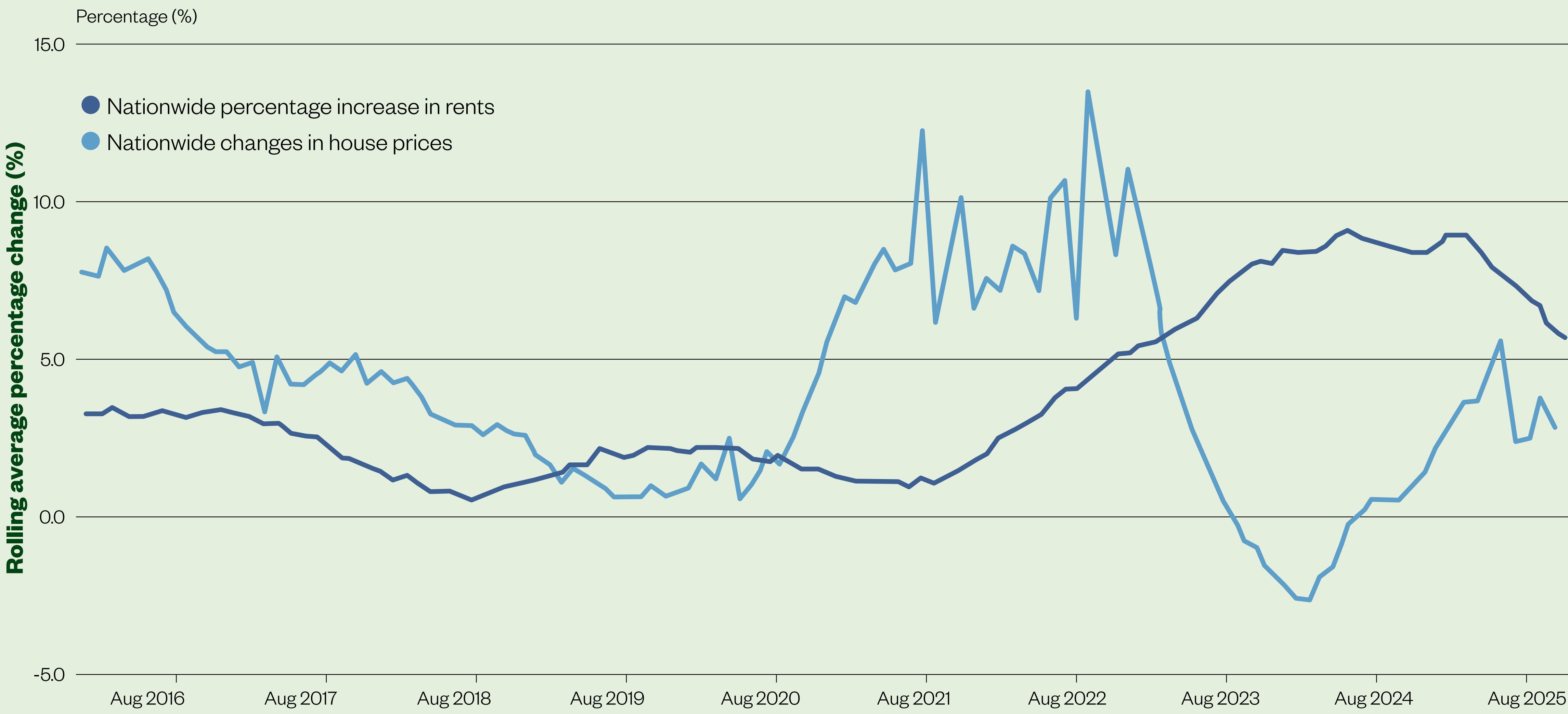


Market movements for housebuilders post election

Indexed from the last general election



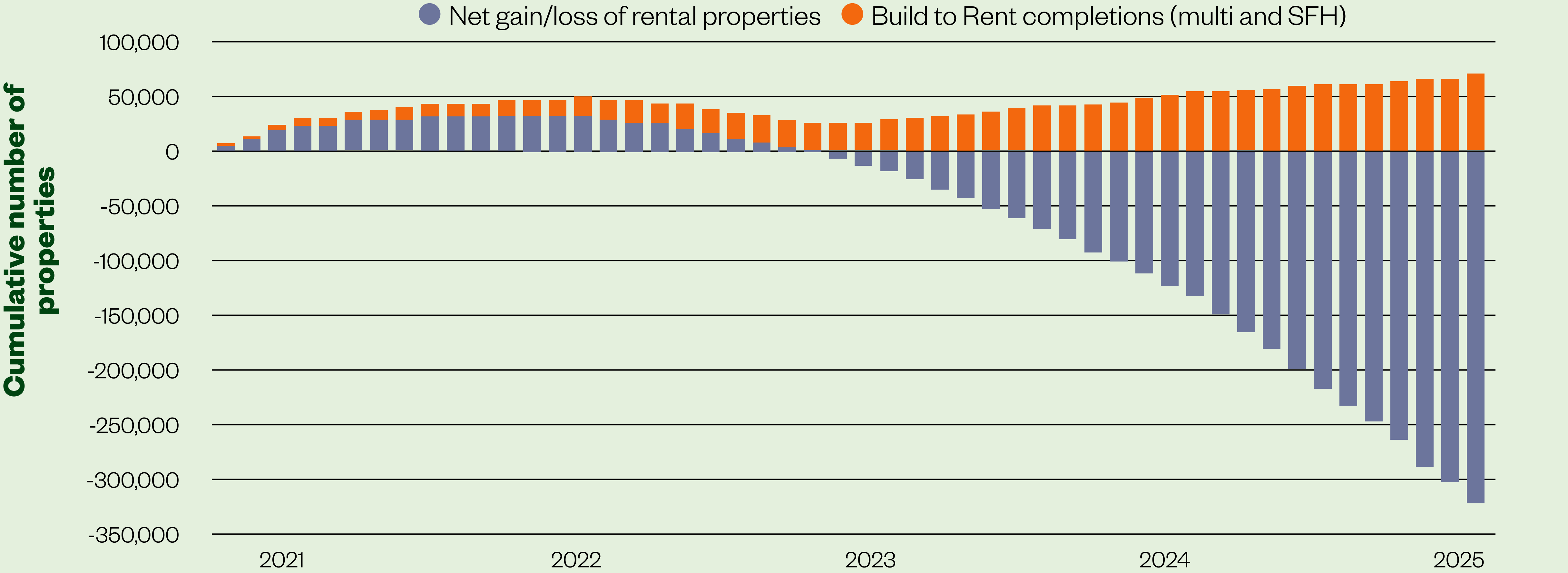
Rents outperforming house prices



Housebuilders seeking to manage risk by forward selling onto build to rent investors

Build to rent capital failing to match private buy to let investor departure

Estimated cumulative change in the number of properties held for private rental (increase up to February 2023 and reduction thereafter) compared with aggregated new BtR completions over the same period.



Reduction in availability maintaining rental growth

Ultimately the Bond Markets Matter



Impact upon:

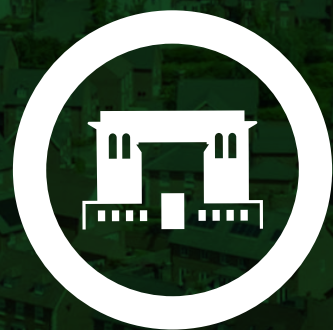
- housebuyer attitude
- housing associations
- housebuilder behaviour

Mortgages are typically priced off the 5 year gilt rate.

Super Strategic Sites have to be able to weather these cycles



26
primary schools



7
secondary schools



28km
of cycleways



2,000+
acres of open space



11m ft² +
employment floor space

2,000+ Homes
=
c. +10 years of delivery

Super Strategic Sites have a long shopping list of requirements

GREEN INFRASTRUCTURE

- Formal and informal play provision
- Amenity and natural greenspace
- Tracks and trails
- Allotments and orchards
- Habitat creation (BNG)

EDUCATION

- Pre-school provision
- Primary Schools
- Secondary Schools
- Sixth Form College
- Special Education Needs Provision
- Skills training facilities

HEALTH

- GP surgeries
- Regional Health Centres

COMMUNITY

- Community meeting spaces
- Library provision
- Places of worship
- Cemeteries

FORMAL SPORT

- Pitches
- Courts
- Associated facilities
- Sport halls

UTILITIES INFRASTRUCTURE

- Sub stations
- Water treatment facilities
- Improved broadband infrastructure
- Energy centres/microgrids
- Flood Alleviation

WASTE MANAGEMENT

- Recycling centres
- Bin Storage

COST BENCHMARKING

On-site infrastructure and s.106 costs for Urban&Civic Super Strategic Sites currently run to c.£60,000/plot, x4 the typical equivalent figure for infill development, before affordable housing requirements are also factored in.

MOVEMENT

- Off-site highway improvements
- New rail/rapid transit infrastructure
- Travel hubs/public transport stops
- Park and ride
- Cycle hire
- Car clubs

COMMERCIAL

- Nurseries
- Retail
- Food and drink outlets
- Essential services – eg. Banking, pharmacy, opticians, veterinary surgeries, garages

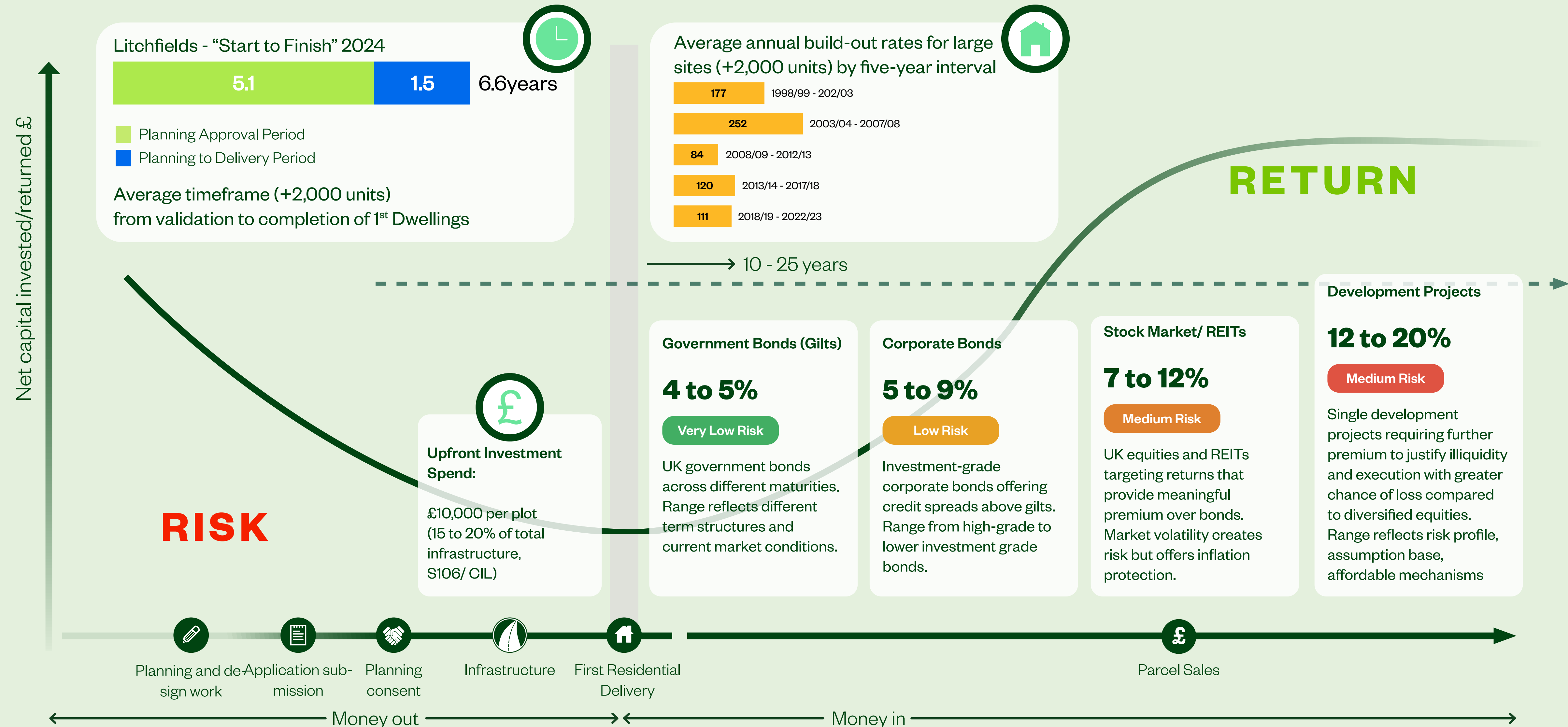
Infrastructure Delivery/Management Plans
LPA + Infrastructure/Service Provide's

Best Practice Guidance
Government Departments/ALB's
Non Strategic Bodies

Topic Specific Requirements
Eg. Natural England Heritage England
Environmental Agency

Planning Officers Society Conference 2026

Super Strategic Sites - The Developer's Dilemma

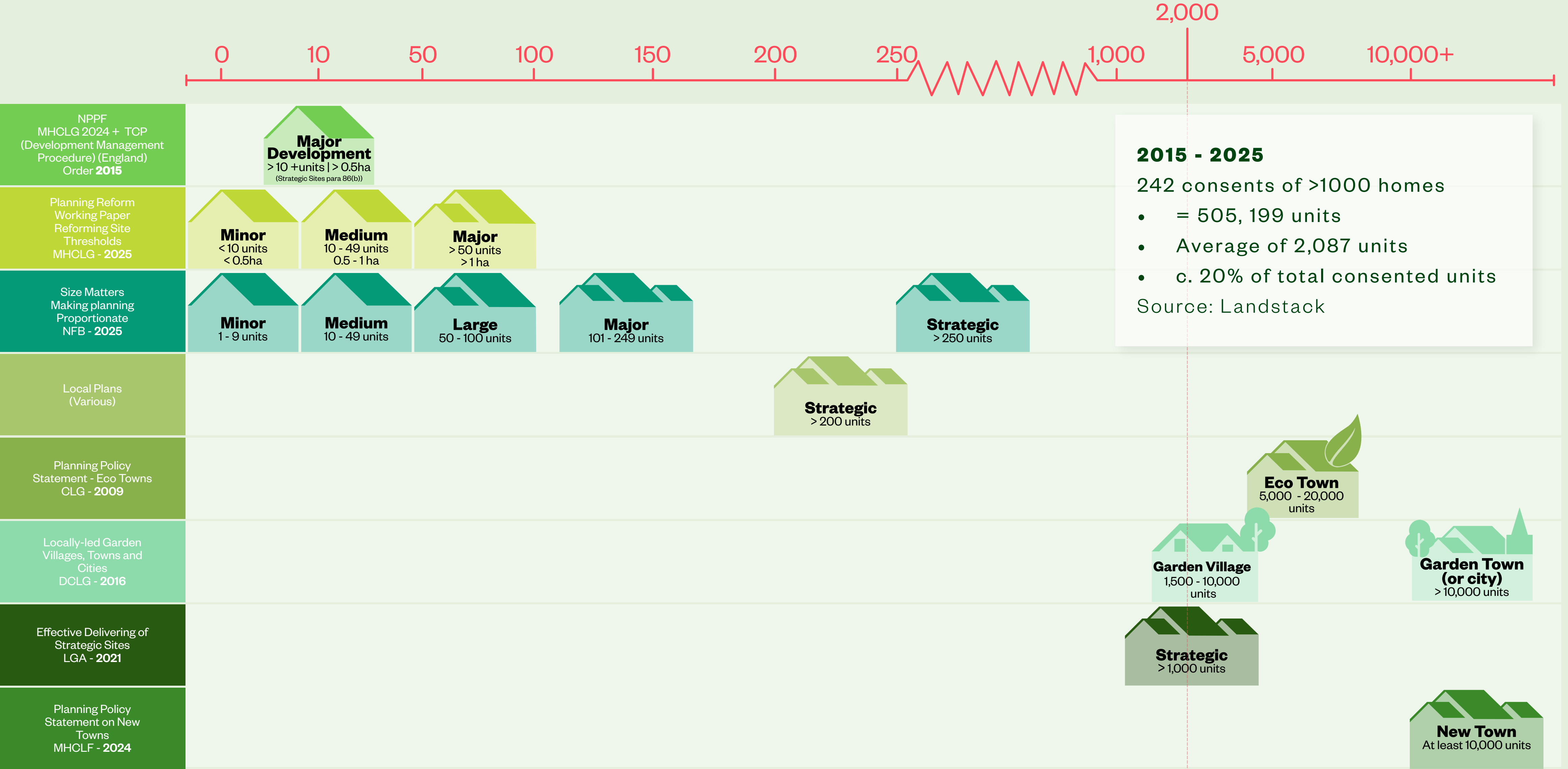


Super Strategic Sites - The Planner's Dilemma

SCALE + DURATION = UNCERTAINTY



Policy: Where do Super Strategic Sites fit in?



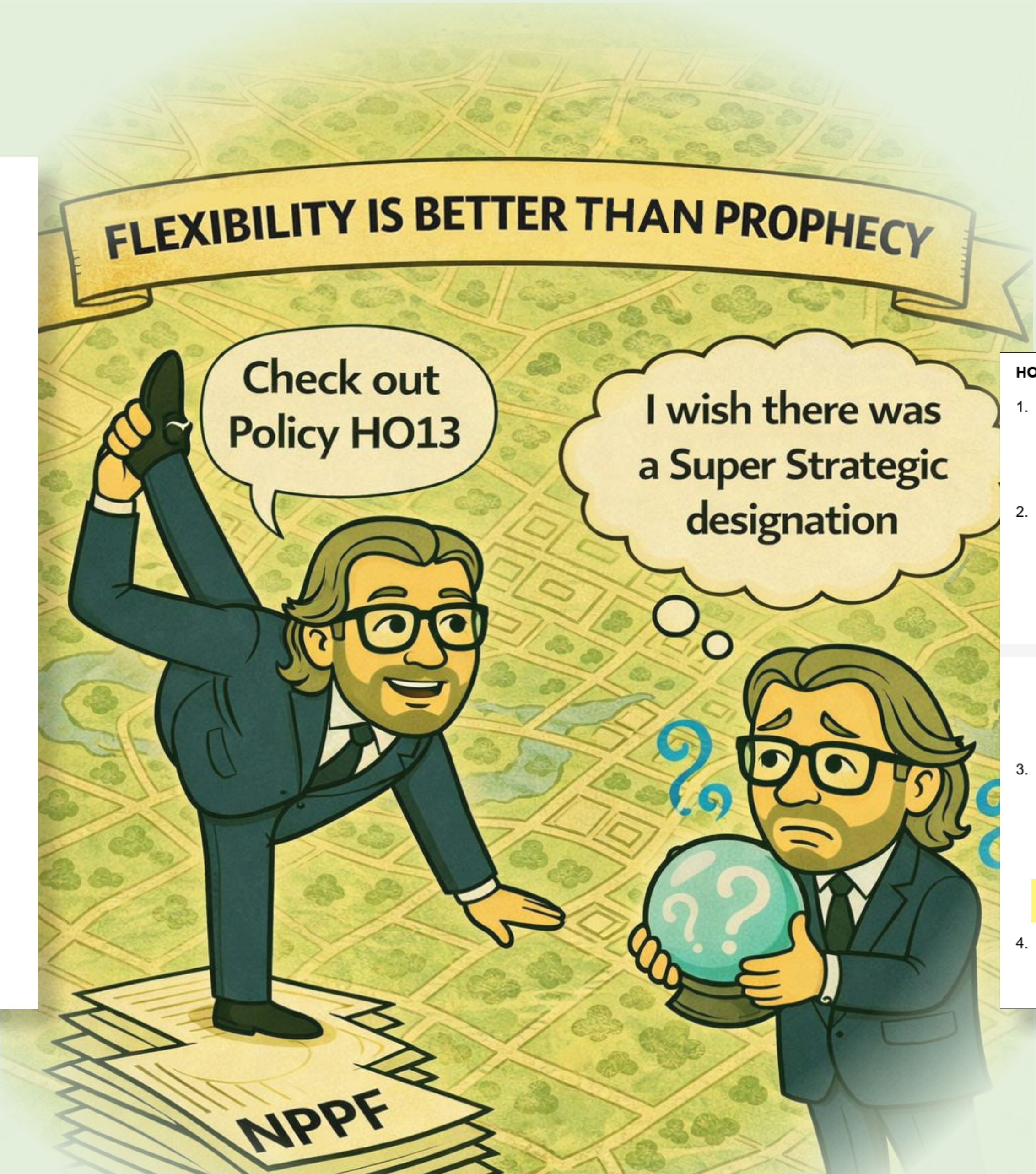
HO13 to the rescue



Ministry of Housing,
Communities &
Local Government

Proposed reforms to the National Planning Policy Framework and other changes to the planning system

December 2025



HO13: Build out of residential and mixed-use development

1. To significantly boost the supply of homes, it is important that land with permission is developed without unnecessary delay. Proposals for major residential and mixed-use development should be capable of bringing housing forward within a reasonable period, taking into account the proposed housing tenure mix for the development, local market conditions (including absorption rates) and the development history of the site.
2. Consideration should be given to whether to impose a planning condition requiring that development begins within a timescale shorter than the relevant statutory default period, where this would expedite the development without threatening its implementation or

37

viability.

3. Where there are development proposals for large scale residential and mixed-use development which will be implemented through multiple phases across development plan periods, the consenting framework for the proposal should:
 - a. Secure the approach to design, infrastructure and other site-specific requirements for the development, including the scale of affordable housing; and
 - b. Be flexible enough to respond positively to changing circumstances as phases are brought forward, including changes to housing need, viability and design.
4. Development proposals affecting sites for large scale residential and mixed-use development set out in emerging development plans should not be inconsistent with the proposed scale, location and phasing of those emerging proposals.

But without a Super Strategic Site designation...

We still have inconsistent definitions of scale



- PM1: Requires the identification of broad locations for **strategic developments** including **new settlements, major urban extensions, major cross-boundary development and key locations for new homes and jobs.**
- PM2: Requires a vision for the local plan area which reflects longer term expectations including **large scale development proposals.**
- PM12: Makes reference to **strategic sites, which are critical to the delivery of the plan.**
- HO4: Refers to suitable locations **for large scale development, such as new settlements, new urban quarters or significant extensions to existing settlements.**
- HO13 (1) directs itself to **major residential and mixed use development** whilst HO13(3) addresses **large scale residential and mixed use development which will be implemented through multiple phases across development plan periods** and HO13(4) reverts to **large scale residential and mixed use development.**
- GB8: Identifies the need for viability assessment on land released from the green belt for a **multi-phase, strategic sites.**
- DP4: Encourages appropriate use of design review for significant projects such **as major housing and mixed-use schemes.**
- HC1: Seeks facilities and contributions from developments including **major housing and mixed-use schemes.**
- F8: Requires advice on SUDS from the Lead Local Flood Authority for **major development.**
- Within the definition of Deliverable where a site has outline planning permission for **major development** it should only be considered deliverable where there is clear evidence that homes will be delivered on the site within five years.

Super Strategic - a class of it's own

A SUPER
STRATEGIC
DEVELOPMENT
CLASSIFICATION
+2000 UNITS



Plan Making



Conditions



Design Codes



Statistics



Extensions



A Consistent
Phase Definition



Obligations



Viability,
Infrastructure
and Affordable
Housing



Golden Rules

But seeing is believing and you are always welcome

