

## Housing Standards

4469. Allerdale's population is ageing and with it comes the need to ensure that new housing developments are adaptable and allow individuals to be able to lead an independent life within their own home.

### Policy SA5 Housing Standards

~~All new homes~~ For developments of 10 units or more, 20% of the dwellings must be designed and constructed to meet the requirements set out in optional Building Requirement M4(2) (or any national equivalent standard should these regulations be subsequently reviewed).

All residential developments over 30 units must ensure that 5% of the total units (across both market and affordable dwellings) should be designed and constructed to meet optional Building Requirement M4(3), ~~ensuring that This will require the developer to ensure the dwellings make reasonable provision for wheelchair users to access and live in the dwelling are wheelchair adaptable.~~

In both cases, the Council will take a flexible approach to these policy requirements where the applicant can clearly demonstrate that:

- a) it is not practically achievable due to the physical characteristics of the site;
- b) it would significantly harm the financial viability of the scheme; or
- c) site specific factors mean that step-free access to the dwelling cannot be achieved.

4570. This policy will provide homes that will be accessible and adaptable to a wide range of occupants, including young families, the elderly and disabled people.

4674. The implementation of the requirements of M4(2) is particularly important in Allerdale due to its ageing population. Forecasts show that the ageing population in Allerdale is growing at a faster rate than the regional and national averages; the district is in the top 20% in the country for the increase in the population aged 65 and over between 2004 and 2014<sup>1</sup>.

4772. Government research has identified older people as the main group needing adaptations to their homes to allow them to live independently<sup>2</sup>; given that older people spend 70-90% of their time in their homes it is important to ensure that homes can be satisfactorily adapted to allow them to live independently in a safe manner for as long as they want to.

<sup>1</sup>

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2014basedprojections>

<sup>2</sup> [http://www.ilc-alliance.org/images/uploads/publication-pdfs/pdf\\_pdf\\_49.pdf](http://www.ilc-alliance.org/images/uploads/publication-pdfs/pdf_pdf_49.pdf)

**4873.** A recent survey carried out by Allerdale Borough Council has shown that there is demand for people who want to stay in their own homes for as long as possible as they get older. This, combined with the pressure on public health and social care, it is important for the requirements of M4(2) to be implemented in 20% if the total dwellings in all major planning applications all new builds.

**4974.** Applying regional evidence at a local level<sup>3</sup>, it has shown that Allerdale has an unmet wheelchair housing need of 292 houses; this equates to 16 dwellings per annum which represents 5% of Allerdale's annual housing supply target of 304. Approximately 2.8% of English households have a wheelchair user. However, given the fact that Allerdale's population is ageing quicker than the national average, it is considered that this figure will be higher in Allerdale. Therefore, the Council will also require 5% of units in housing developments of 30 houses or more to be made wheelchair ~~accessible~~ adaptable, in compliance with M4(3). The policy requirement will be applied to both affordable and market dwellings; the appropriate split will be determined on a case by case basis at the stage of determining a planning application.

**5075.** The policy could be applied flexibly if there was an issue of viability or where the requirements cannot be provided due to the physical characteristics of the development site. This will be assessed on a case by case basis, and the applicant will be required to provide clear, justified evidence that this policy cannot be fully achieved. A lower level of provision will be sought through the reduction in the number of units required to be provided before assessing the appropriateness of removing the policy requirement completely.

|                                      |   |
|--------------------------------------|---|
| <b>National Planning Policy</b>      | NPPF paragraphs 7, 9, 14, 17, 47, 50  |
| <b>Spatial objectives</b>            | SO2a, SO2e  |
| <b>Local Plan Strategic Policies</b> | S2, S4, S7, S10   |
| <b>Allerdale Council Plan</b>        | <b>Improving health and wellbeing:</b> ensuring access to suitable and safe housing |
| <b>Evidence Base</b>                 | Housing Standards Topic Paper 2018  |

<sup>3</sup> <https://www.habinteg.org.uk/news/mind-the-step-habinteg-takes-a-fresh-look-at-housing-for-wheelchair-users-388>

## **Explanation text for Modifications to Policy SA5 – Housing Standards**

Following the Examination in Public into the Allerdale Local Plan (Part 2), the Council has reviewed Policy SA5, which was originally seeking for all new housing to meet the requirements of M4(2) of the Optional Housing Standards.

The Council has assessed various policy options in order to reduce the potential impact on the development surplus. The Council is proposing to amend the policy so that it applies only apply to major planning applications (10 dwellings or more).

Furthermore, the policy would now only require 20% of the dwellings to meet the M4(2) standards; this is in line with evidence contained within the Topic Paper (TP1a). Within the Council's 2016 Housing Study, 17.1% of those surveyed (aged 60+) said that they would consider buying a property on the open market. Given that Allerdale has a super-ageing population and that mobility issues for the population are predicted to worsen over time in line with this, it is considered prudent to round the 17.1% up to a 20% requirement in order to offer an approach which will meet the population needs for the rest of the plan period.

During the Examination in Public, the Council's viability consultants, Keppie Massie, submitted document ABC.11 which set out the impact of the original requirements of Policy SA5. This showed that the impact on the surplus profit from M4(2) ranged from £8-£12 (per m<sup>2</sup>), depending on the site allocation.

The Council instructed Keppie Massie to re-calculate the impact on the surplus using the proposed changes of introducing a threshold and the reduction to 20% of dwellings being required to meet the standards; a briefing note has been prepared by Keppie Massie and is attached.

The revised viability work has shown that the impact on the development surplus will be reduced to just £2 (per m<sup>2</sup>) on the larger sites and completely removed for those allocations of nine dwellings or less. In terms of developer profits, the cost of including M4(2) standards within major housing planning applications, would equate to 0.11%-0.28%, depending on the site allocation. Therefore, it is not considered that the proposed changes to Policy SA5 would create such a burden on viability that it would affect the deliverability of the site allocations.

With regards to M4(3), the Council considers that the requirements included within Policy SA5 are sound and supported by evidence.

The Topic Paper acknowledges that it is difficult to identify the need for dwellings for wheelchair users at a local level. Therefore the requirement for 5% of dwellings for schemes of 30 or more units to meet M4(3) standards has been calculated using regional data and a formula within the Habinteg *Mind the Step* report. This is a practise which has been accepted in recent Local Plan Examinations, for example at South Lakeland District Council.

The formula shows that there is an unmet need of 16 dwellings per annum, which equates to 5% of Allerdale's annual housing supply target of 304.

In terms of viability, the cost of implementing the M4(3) requirements (where applicable) would add an additional £1-£2 (per m<sup>2</sup>) on top of the M4(2) requirements. Again, it is not considered that these costings would affect the deliverability of sites.

The issue of a transition period was raised at the Examination in Public. The Topic Paper sets out that from the date of adoption of the Local Plan (Part 2), all relevant planning applications will be expected to conform to Policy SA5. For planning applications that have already been submitted and are currently undetermined or where schemes are at the early design/planning stage when the Local Plan (Part 2) is adopted, then the Council will determine an appropriate level of weight to give to Policy SA5 on a case-by-case basis given the viability and delivery issues which may arise from the requirement to amend schemes at these stages.

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**ALLERDALE LOCAL PLAN (PART TWO)**

**BRIEFING NOTE : POLICY SA5 HOUSING STANDARDS**

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**Prepared on Behalf of**

**Allerdale Borough Council**

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**LIVERPOOL**

Alabama House  
6 Rumford Place  
Liverpool L3 9BY

**MANCHESTER**

Hill Quays  
14 Commercial Street  
Manchester  
M15 4PZ

[www.keppiemassie.com](http://www.keppiemassie.com)

**GLASGOW**

272 Bath Street  
Glasgow  
G2 4JR

**LONDON**

78 York Street  
London  
W1H 1DP

## TABLE OF CONTENTS

|     |   |   |
|-----|---|---|
| 1.0 | POLICY COMPLIANT POSITION .....         | 1 |
| 2.0 | ADJUSTMENT TO M4 (2) REQUIREMENTS ..... | 3 |
| 3.0 | CONCLUSION.....                         | 4 |

### Appendices

|            |   |
|------------|---|
| Appendix 1 | Expanded ABC 13 to include Profit Returns Based on Full M4 (2)/(3) Requirements |
| Appendix 2 | Results (surplus per sq.m) with Reduced M4 (2) Requirements                     |
| Appendix 3 | Results (Residual Developers Profit) with Reduced M4 (2) Requirements           |

## ALLERDALE LOCAL PLAN (PART 2)

### BRIEFING NOTE: POLICY SA5 HOUSING STANDARDS

#### **1.0 POLICY COMPLIANT POSITION**

- 1.1 The Local Plan (Part 2) Viability Study (**EB2**) considered the impact of Policy SA5 Housing Standards in terms of the requirements to achieve M4 (2) for all dwellings and M4 (3) to 5% of dwellings for those allocations with a capacity of over 30 dwellings. The results of this testing are contained in table 7.1 of the study. This table was subsequently updated following revisions made by the County Council to the requirements for education contributions. The revised table 7.1 dated 17 May has been submitted as document reference **ABC 11**.
- 1.2 With reference to **ABC 11**, the results of the testing show that requirements to achieve M4 (2) to all dwellings leads to a reduction in the level of surplus of between £8 and £12 per sq.m. In all cases this equates to less than 1% of gross development value (GDV), and therefore the requirement to achieve compliance with M4 (2) for all dwellings has a very limited impact on overall viability.
- 1.3 If the requirement for 5% of dwellings to achieve M4 (3) on schemes over 30 dwellings is included, then this leads to a further reduction in the surplus of around £2 per sq.m for applicable allocations.
- 1.4 **ABC 13** was prepared to show the residual developers profit return for each of the allocations. The residual profit being the sum remaining once all development costs (including land and finance costs) had been deducted from the GDV of the completed development. **ABC 13** shows the profit position inclusive of affordable housing requirements. Using the results of the viability testing for M4 (2) and M4 (3), we have expanded ABC 13 to also include the resultant developers profit return with M4 (2) and M4 (3) included (where applicable). A copy of this expanded table is contained at **Appendix 1**. For completeness the table shows the resultant developers profit return both with and without these requirements and on the basis of 0%, 10% and 20% affordable housing. For ease of reference we have also presented the results with reference to value zones in table 6.4 of **EB 2**.

- 1.5 The Local Plan (Part 2) Viability Study (**EB2**) adopted a developer's profit of 20% of GDV for both market and affordable housing for allocations of 20 dwellings or more and 17.5% for smaller developments. The Planning Practice Guidance (PPG) states that:

*"For the purpose of plan making an assumption of 15-20% of gross development value (GDV) may be considered a suitable return to developers in order to establish the viability of plan policies."*

(Paragraph: 018 Reference ID: 10-018-20190509)

- 1.6 The assumption of 20% of GDV is therefore at the highest end of the range identified in the PPG. Indeed the PPG goes on to say that:

*"A lower figure may be more appropriate in consideration of delivery of affordable housing in circumstances where this guarantees an end sale at a known value and reduces risk."*

(Paragraph: 018 Reference ID: 10-018-20190509)

- 1.7 This is the case here where our testing considers the impact of the delivery of affordable housing based on 20% of dwellings ie. the policy compliant position. We have also considered delivery based on 10% provision.

- 1.8 Reflecting the advice in the PPG we have colour coded the results at Appendix 1. Those results which achieve the profit return adopted in the study are highlighted green, those which achieve a profit return in accordance with the PPG are highlighted amber and those which achieve a profit or less than 15% of GDV are coloured red.

- 1.9 With reference to the allocations in zones 2, 3 and 4, all save for one (SA11), are viable with 20% affordable housing and full M4 (2)/(3) requirements. The reasons for the more limited level of viability for SA11 are noted in paragraph 7.13 of **EB 2**.

- 1.10 Based on the policy compliant level of affordable housing and M4 (2)/(3) requirements all but two of the eight allocations in Zone 5 (including SA 23) achieve a viable profit return in accordance with the PPG at between 15-20% of GDV. Assuming 20% affordable provision allocations SA13 and SA15 have profits at just below 15%, however at 10% affordable provision with M4 (2)/(3) requirements these allocations generate a profit returns of 18.17% and 17.78% of GDV respectively. This is well within the range of viable profit returns advocated by the PPG.



- 1.11 In Zone 6 the two small sites SA 21 and SA27 generate unviable results before policy requirements are taken into account. Of the remaining 4 allocations, then based on 10% affordable housing provision and full M4 (2)/(3) requirements the profit returns generated are between 15.42% and 17.60% of GDV and are within the range of viable profit returns identified in the PPG.

## 2.0 ADJUSTMENT TO M4 (2) REQUIREMENTS

- 2.1 We have also considered the impact on viability of reduced requirements in relation to M4 (2). Specifically we have prepared further appraisals of the allocations based on a requirement for 20% of dwellings to achieve M4 (2) standards on sites of 10 dwellings or more. Requirements for M4 (3) remain unchanged.
- 2.2 We have provided at **Appendix 2** the results of our testing on this basis. For consistency the table at Appendix 2 is in the same format as table 7.1 of **EB 2**, save for the changes made to the "*Impact on Surplus (per sq.m)*" columns for M4 (2) and M4 (2)/(3) to reflect the lower requirement.
- 2.3 The testing shows that the provision of 20% of dwellings to meet M4 (2) reduces the surplus by only £2 per sq.m. With M4 (3) added for applicable allocations the overall reduction is between £3 and £4 per sq.m.
- 2.4 For comparative purposes we have also presented these results based on the residual developers profit return. These results are contained at **Appendix 3** and may be compared with the results at **Appendix 1**. The reduction in M4 (2)/(3) requirements generally increases the developers profit return by around 0.5% of GDV.
- 2.5 With reference to the results table presented by value zone, the outcome of the testing is largely unchanged in Zones 2, 3 and 4. In Zone 5 (including SA23) at 20% affordable housing, all of the allocations tested now achieve a developers profit within the range identified in the PPG at between 15% and 20% of GDV.
- 2.6 In Zone 6 the two unviable small sites (SA21 and SA27) are no longer subject to M4 (2) requirements. Of the remaining 4 sites all are slightly more viable. At 20% affordable housing, one (SA19), achieves a developers profit in the range identified in the PPG whilst based on 10% affordable provision all of the allocations produce a developer's profit that accords to the range contained in the PPG.

### 3.0 CONCLUSION

- 3.1 As illustrated in **ABC 11**, the requirement to achieve M4 (2) to all dwellings leads to a small reduction in the level of surplus of between £8 and £12 per sq.m. In all cases this equates to less than 1% of gross development value (GDV), and therefore the requirement to achieve compliance with M4 (2) for all dwellings has a very limited impact on overall viability.
- 3.2 If the requirement for 5% of dwellings to achieve M4 (3) on schemes over 30 dwellings is included, then this leads to a further reduction in the surplus of around £2 per sq.m for applicable allocations.
- 3.3 Requirements to achieve M4 (2)/M4 (3) do not have a significant effect on development viability and in most cases can be supported in conjunction with 20% affordable housing provision in Zones 2, 3 and 4. Of the 8 allocations tested in Zone 5, then based on a policy compliant position the results at **Appendix 1** show that 6 achieve a developer's profit that is within the viable range identified in the PPG.
- 3.4 In Zone 6 the results are less viable, however at 10% affordable housing provision and full M4 (2)/(3) requirements the four allocations with a capacity greater than 10 dwellings all achieve a developers profit within the viable range identified in the PPG.
- 3.5 A reduction in the requirement for M4 (2) to only 20% of the dwellings produces a slight improvement in viability. The reduction in the surplus on this basis is only around £2 per sq.m and with M4 (3) added for applicable allocations the overall reduction is between £3 and £4 per sq.m.
- 3.6 With this reduction in M4 (2) requirements the overall outcome of the testing in Zones 2, 3 and 4 is largely unchanged. In Zone 5 assuming 20% provision all allocations now achieve a level of profit that is within the viable range identified in the PPG at between 15% and 20%. In Zone 6 the outcome is also largely unchanged save for SA19 which at 20% affordable provision now achieves a profit within the range identified in the PPG. All allocations in Zone 6, based on 10% affordable provision, achieve a profit within the viable range identified in the PPG.

Keppie Massie

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**KEPPIE MASSIE LTD**

**Date: 18 June 2019**

**Ref: AGM/JA/RC**

**APPENDIX 1**

**EXPANDED ABC 13 TO INCLUDE PROFIT RETURNS  
BASED ON FULL M4 (2)/(3) REQUIREMENTS**

**Appendix 1**

**Allerdale Local Plan Results - Profit Return for Allocations**

**Policy Position**

| Zone | Policy Ref | Address                          | Settlement     | Capacity | Excluding M4 Requirements |                |                | Including M4 Requirements |                |                | 1% GDV<br>£/sq.m |
|------|------------|----------------------------------|----------------|----------|---------------------------|----------------|----------------|---------------------------|----------------|----------------|------------------|
|      |            |                                  |                |          | Base                      | 10% Affordable | 20% Affordable | Base                      | 10% Affordable | 20% Affordable |                  |
| 3    | SA8        | Stainburn Road, Stainburn        | Workington     | 130      | 25.69%                    | 24.27%         | 21.60%         | 25.08%                    | 23.64%         | 20.94%         | £20              |
| 4    | SA9        | Main Road, Harrington            | Workington     | 115      | 26.61%                    | 25.03%         | 22.15%         | 25.90%                    | 24.30%         | 21.39%         | £19              |
| 3    | SA10       | Land off Seaton Road, Seaton     | Workington     | 150      | 27.34%                    | 25.93%         | 23.26%         | 26.73%                    | 25.30%         | 22.61%         | £20              |
| 4    | SA11       | Former Southfield School         | Workington     | 65       | 19.71%                    | 17.90%         | 14.91%         | 18.99%                    | 17.16%         | 14.13%         | £19              |
| 5    | SA13       | Whitecroft                       | Maryport       | 300      | 20.69%                    | 18.97%         | 15.68%         | 19.92%                    | 18.17%         | 14.83%         | £18              |
| 2    | SA14       | Syke Road                        | Wigton         | 25       | 29.41%                    | 27.71%         | 25.43%         | 28.90%                    | 27.19%         | 24.89%         | £21              |
| 5    | SA15       | Adj Rugby Club, Station Road     | Aspatria       | 60       | 20.21%                    | 18.54%         | 15.40%         | 19.46%                    | 17.78%         | 14.60%         | £18              |
| 5    | SA16       | Land at Noble Croft              | Aspatria       | 100      | 21.73%                    | 20.11%         | 17.04%         | 20.98%                    | 19.34%         | 16.23%         | £18              |
| 5    | SA17       | Land off Station Road            | Aspatria       | 20       | 20.78%                    | 19.05%         | 16.37%         | 20.17%                    | 18.42%         | 15.71%         | £18              |
| 5    | SA18       | Brayton road                     | Aspatria       | 10       | 18.32%                    |                |                | 17.70%                    |                |                | £19              |
| 6    | SA19       | Fell View                        | Silloth        | 20       | 20.01%                    | 18.26%         | 15.54%         | 19.38%                    | 17.60%         | 14.87%         | £17              |
| 6    | SA20       | Land adj to Wheatsheaf Inn       | Abbeytown      | 35       | 18.61%                    | 16.73%         | 13.98%         | 17.85%                    | 15.94%         | 13.16%         | £17              |
| 6    | SA21       | Land at Main Road                | Abbeytown      | 5        | 9.04%                     |                |                | 8.34%                     |                |                | £18              |
| 6    | SA22       | Land at Abbey Road               | Abbeytown      | 15       | 18.58%                    | 16.61%         | 14.33%         | 17.94%                    | 15.96%         | 13.66%         | £17              |
| 4/5* | SA23       | land adj Meadowlands             | Broughton Moor | 25       | 22.11%                    | 20.20%         | 17.65%         | 21.52%                    | 19.59%         | 17.02%         | £18              |
| 2    | SA24       | Rose Farm                        | Broughton      | 55       | 30.28%                    | 28.84%         | 26.51%         | 29.70%                    | 28.24%         | 25.89%         | £21              |
| 5    | SA25       | Rear of Marona, West Lane        | Flimby         | 10       | 19.72%                    |                |                | 19.10%                    |                |                | £19              |
| 6    | SA26       | Lynholme                         | Kirkbride      | 45       | 18.16%                    | 16.21%         | 13.43%         | 17.40%                    | 15.42%         | 12.60%         | £17              |
| 6    | SA27       | Birch Hall Lane                  | Kirkbride      | 6        | 13.03%                    |                |                | 12.41%                    |                |                | £18              |
| 5    | SA28       | Rear of Bank House               | Prospect       | 25       | 22.73%                    | 20.82%         | 18.28%         | 22.11%                    | 20.19%         | 17.63%         | £18              |
| 2    | SA29       | Land to the west of Matty Loning | Thursby        | 40       | 30.38%                    | 29.10%         | 26.57%         | 29.80%                    | 28.51%         | 25.95%         | £21              |

**Key**

- Profit > 20% GDV (Sites 20 or more dwellings)
- Profit > 17.5% GDV (Sites less than 20 dwellings)
- Profit 15% - 20% in accordance with current PPG
- Profit < 15% GDV

**Profit Results Presented with Reference to Value Zones**

| Zone | Policy Ref | Address                           | Settlement     | Capacity | Excluding M4 Requirements |                |                | Including M4 Requirements |                |                | 1% GDV<br>£/sq.m |
|------|------------|-----------------------------------|----------------|----------|---------------------------|----------------|----------------|---------------------------|----------------|----------------|------------------|
|      |            |                                   |                |          | Base                      | 10% Affordable | 20% Affordable | Base                      | 10% Affordable | 20% Affordable |                  |
| 2    | SA14       | Syke Road                         | Wigton         | 25       | 29.41%                    | 27.71%         | 25.43%         | 28.90%                    | 27.19%         | 24.89%         | £21              |
| 2    | SA24       | Rose Farm                         | Broughton      | 55       | 30.28%                    | 28.84%         | 26.51%         | 29.70%                    | 28.24%         | 25.89%         | £21              |
| 2    | SA29       | Land to the west of Matty Lonning | Thursby        | 40       | 30.38%                    | 29.10%         | 26.57%         | 29.80%                    | 28.51%         | 25.95%         | £21              |
| 3    | SA8        | Stainburn Road, Stainburn         | Workington     | 130      | 25.69%                    | 24.27%         | 21.60%         | 25.08%                    | 23.64%         | 20.94%         | £20              |
| 3    | SA10       | Land off Seaton Road, Seaton      | Workington     | 150      | 27.34%                    | 25.93%         | 23.26%         | 26.73%                    | 25.30%         | 22.61%         | £20              |
| 4    | SA9        | Main Road, Harrington             | Workington     | 115      | 26.61%                    | 25.03%         | 22.15%         | 25.90%                    | 24.30%         | 21.39%         | £19              |
| 4    | SA11       | Former Southfield School          | Workington     | 65       | 19.71%                    | 17.90%         | 14.91%         | 18.99%                    | 17.16%         | 14.13%         | £19              |
| 4/5* | SA23       | land adj Meadowlands              | Broughton Moor | 25       | 22.11%                    | 20.20%         | 17.65%         | 21.52%                    | 19.59%         | 17.02%         | £18              |
| 5    | SA13       | Whitecroft                        | Maryport       | 300      | 20.69%                    | 18.97%         | 15.68%         | 19.92%                    | 18.17%         | 14.83%         | £18              |
| 5    | SA15       | Adj Rugby Club, Station Road      | Aspatria       | 60       | 20.21%                    | 18.54%         | 15.40%         | 19.46%                    | 17.78%         | 14.60%         | £18              |
| 5    | SA16       | Land at Noble Croft               | Aspatria       | 100      | 21.73%                    | 20.11%         | 17.04%         | 20.98%                    | 19.34%         | 16.23%         | £18              |
| 5    | SA17       | Land off Station Road             | Aspatria       | 20       | 20.78%                    | 19.05%         | 16.37%         | 20.17%                    | 18.42%         | 15.71%         | £18              |
| 5    | SA18       | Brayton road                      | Aspatria       | 10       | 18.32%                    |                |                | 17.70%                    |                |                | £19              |
| 5    | SA25       | Rear of Marona, West Lane         | Flimby         | 10       | 19.72%                    |                |                | 19.10%                    |                |                | £19              |
| 5    | SA28       | Rear of Bank House                | Prospect       | 25       | 22.73%                    | 20.82%         | 18.28%         | 22.11%                    | 20.19%         | 17.63%         | £18              |
| 6    | SA19       | Fell View                         | Silloth        | 20       | 20.01%                    | 18.26%         | 15.54%         | 19.38%                    | 17.60%         | 14.87%         | £17              |
| 6    | SA20       | Land adj to Wheatsheaf Inn        | Abbeytown      | 35       | 18.61%                    | 16.73%         | 13.98%         | 17.85%                    | 15.94%         | 13.16%         | £17              |
| 6    | SA21       | Land at Main Road                 | Abbeytown      | 5        | 9.04%                     |                |                | 8.34%                     |                |                | £18              |
| 6    | SA22       | Land at Abbey Road                | Abbeytown      | 15       | 18.58%                    | 16.61%         | 14.33%         | 17.94%                    | 15.96%         | 13.66%         | £17              |
| 6    | SA26       | Lynholme                          | Kirkbride      | 45       | 18.16%                    | 16.21%         | 13.43%         | 17.40%                    | 15.42%         | 12.60%         | £17              |
| 6    | SA27       | Birch Hall Lane                   | Kirkbride      | 6        | 13.03%                    |                |                | 12.41%                    |                |                | £18              |

**Key**

- Profit > 20% GDV (Sites 20 or more dwellings)
- Profit > 17.5% GDV (Sites less than 20 dwellings)
- Profit 15% - 20% in accordance with current PPG
- Profit < 15% GDV

**APPENDIX 2**

**RESULTS (SURPLUS PER SQ.M) WITH  
REDUCED M4 (2) REQUIREMENTS**

**Appendix 2 Allocations Results Based on 20% of Dwellings Meeting M4(2) Requirements**

**Allocations of 10 or above**

| Policy Ref | Address                           | Settlement     | Capacity | Ave Dwelling Size | Surplus (per sq.m) |        |        |
|------------|-----------------------------------|----------------|----------|-------------------|--------------------|--------|--------|
|            |                                   |                |          |                   | Base               | 10% AH | 20% AH |
| SA8        | Stainburn Road, Stainburn         | Workington     | 130      | 105               | £96                | £70    | £25    |
| SA9        | Main Road, Harrington             | Workington     | 115      | 99                | £104               | £77    | £32    |
| SA10       | Land off Seaton Road, Seaton      | Workington     | 150      | 105               | £121               | £96    | £50    |
| SA11       | Former Southfield School          | Workington     | 65       | 99                | -£5                | -£32   | -£74   |
| SA13       | Whitecroft                        | Maryport       | 300      | 99                | £9                 | -£13   | -£53   |
| SA14       | Syke Road                         | Wigton         | 25       | 99                | £183               | £145   | £99    |
| SA15       | Adj Rugby Club, Station Road      | Aspatria       | 60       | 99                | £3                 | -£22   | -£67   |
| SA16       | Land at Noble Croft               | Aspatria       | 100      | 99                | £26                | £2     | -£41   |
| SA17       | Land off Station Road             | Aspatria       | 20       | 99                | £13                | -£15   | -£58   |
| SA18       | Brayton road                      | Aspatria       | 10       | 97                | £14                |        |        |
| SA19       | Fell View                         | Silloth        | 20       | 99                | £0                 | -£28   | -£69   |
| SA20       | Land adj to Wheatsheaf Inn        | Abbeytown      | 35       | 98                | -£22               | -£50   | -£91   |
| SA21       | Land at Main Road                 | Abbeytown      | 5        | 88                | -£146              |        |        |
| SA22       | Land at Abbey Road                | Abbeytown      | 15       | 98                | £18                | -£15   | -£50   |
| SA23       | land adj Meadowlands              | Broughton Moor | 25       | 99                | £35                | £3     | -£38   |
| SA24       | Rose Farm                         | Broughton      | 55       | 105               | £193               | £161   | £115   |
| SA25       | Rear of Marona, West Lane         | Flimby         | 10       | 97                | £39                |        |        |
| SA26       | Lynholme                          | Kirkbride      | 45       | 99                | -£28               | -£57   | -£97   |
| SA27       | Birch Hall Lane                   | Kirkbride      | 6        | 99                | -£77               |        |        |
| SA28       | Rear of Bank House                | Prospect       | 25       | 99                | £44                | £13    | -£27   |
| SA29       | Land to the west of Matty Lonning | Thursby        | 40       | 105               | £199               | £171   | £119   |

| Impact on Surplus (per sq.m) |       |              |           |          |
|------------------------------|-------|--------------|-----------|----------|
| S106                         | M4(2) | M4 (2) & (3) | Education | Highways |
| -£8                          | -£2   | -£3          |           | -£13     |
| -£8                          | -£2   | -£4          |           | -£14     |
| -£8                          | -£2   | -£3          |           | -£13     |
| -£9                          | -£2   | -£4          |           | -£14     |
| -£8                          | -£2   | -£3          |           |          |
| -£9                          | -£2   |              |           |          |
| -£9                          | -£2   | -£4          |           |          |
| -£8                          | -£2   | -£4          |           |          |
| -£9                          | -£2   |              |           |          |
| -£10                         | -£2   |              |           |          |
| -£9                          | -£2   |              |           |          |
| -£9                          | -£2   | -£4          |           |          |
| -£11                         |       |              |           |          |
| -£10                         | -£2   |              |           |          |
| -£9                          | -£2   |              |           |          |
| -£8                          | -£2   | -£4          | -£22      |          |
| -£10                         | -£2   |              |           |          |
| -£9                          | -£2   | -£4          |           |          |
| -£10                         |       |              |           |          |
| -£9                          | -£2   |              |           |          |
| -£8                          | -£2   | -£4          |           |          |

**APPENDIX 3**

**RESULTS (RESIDUAL DEVELOPERS PROFIT) WITH  
REDUCED M4 (2) REQUIREMENTS**



**Appendix 3**

**Allerdale Local Plan Results - Profit Return for Allocations**

**M4(2) Requirements to 20% of Dwellings**

**Allocations of 10 or above**

| Zone | Policy Ref | Address                           | Settlement     | Capacity | Profit (% GDV) |                |                |
|------|------------|-----------------------------------|----------------|----------|----------------|----------------|----------------|
|      |            |                                   |                |          | Base           | 10% Affordable | 20% Affordable |
| 3    | SA8        | Stainburn Road, Stainburn         | Workington     | 130      |                |                | 21.60%         |
| 4    | SA9        | Main Road, Harrington             | Workington     | 115      |                |                | 22.15%         |
| 3    | SA10       | Land off Seaton Road, Seaton      | Workington     | 150      |                |                | 23.26%         |
| 4    | SA11       | Former Southfield School          | Workington     | 65       | 19.71%         | 17.90%         | 14.91%         |
| 5    | SA13       | Whitecroft                        | Maryport       | 300      | 20.69%         | 18.97%         | 15.68%         |
| 2    | SA14       | Syke Road                         | Wigton         | 25       |                |                | 25.43%         |
| 5    | SA15       | Adj Rugby Club, Station Road      | Aspatria       | 60       | 20.21%         | 18.54%         | 15.40%         |
| 5    | SA16       | Land at Noble Croft               | Aspatria       | 100      | 21.73%         | 20.11%         | 17.04%         |
| 5    | SA17       | Land off Station Road             | Aspatria       | 20       | 20.78%         | 19.05%         | 16.37%         |
| 5    | SA18       | Brayton road                      | Aspatria       | 10       | 18.32%         |                |                |
| 6    | SA19       | Fell View                         | Silloth        | 20       | 20.01%         | 18.26%         | 15.54%         |
| 6    | SA20       | Land adj to Wheatsheaf Inn        | Abbeytown      | 35       | 18.61%         | 16.73%         | 13.98%         |
| 6    | SA21       | Land at Main Road                 | Abbeytown      | 5        | 9.04%          |                |                |
| 6    | SA22       | Land at Abbey Road                | Abbeytown      | 15       | 18.58%         | 16.61%         | 14.33%         |
| 4/5* | SA23       | land adj Meadowlands              | Broughton Moor | 25       | 22.11%         | 20.20%         | 17.65%         |
| 2    | SA24       | Rose Farm                         | Broughton      | 55       |                |                | 26.51%         |
| 5    | SA25       | Rear of Marona, West Lane         | Flimby         | 10       | 19.72%         |                |                |
| 6    | SA26       | Lynholme                          | Kirkbride      | 45       | 18.16%         | 16.21%         | 13.43%         |
| 6    | SA27       | Birch Hall Lane                   | Kirkbride      | 6        | 13.03%         |                |                |
| 5    | SA28       | Rear of Bank House                | Prospect       | 25       | 22.73%         | 20.82%         | 18.28%         |
| 2    | SA29       | Land to the west of Matty Lonning | Thursby        | 40       |                |                | 26.57%         |

**Excluding M4 Requirements**

| Profit (% GDV) |                |                |
|----------------|----------------|----------------|
| Base           | 10% Affordable | 20% Affordable |
|                |                | 21.38%         |
|                |                | 21.88%         |
|                |                | 23.04%         |
| 19.46%         | 17.64%         | 14.64%         |
| 20.43%         | 18.70%         | 15.40%         |
|                |                | 25.32%         |
| 19.96%         | 18.29%         | 15.13%         |
| 21.48%         | 19.85%         | 16.77%         |
| 20.66%         | 18.93%         | 16.24%         |
| 18.19%         |                |                |
| 19.88%         | 18.13%         | 15.41%         |
| 18.36%         | 16.46%         | 13.71%         |
|                |                |                |
| 18.45%         | 16.48%         | 14.20%         |
| 21.99%         | 20.08%         | 17.53%         |
|                |                | 26.30%         |
| 19.60%         |                |                |
| 17.91%         | 15.94%         | 13.15%         |
|                |                |                |
| 22.60%         | 20.70%         | 18.15%         |
|                |                | 26.36%         |

**Including M4 Requirements**

**Key**

- Profit > 20% GDV (Sites 20 or more dwellings)  
Profit > 17.5% GDV (Sites less than 20 dwellings)
- Profit 15% - 20% in accordance with current PPG
- Profit < 15% GDV

**Profit Results Presented with Reference to Value Zones**




**Allocations of 10 or above**

| Zone | Policy Ref | Address                           | Settlement     | Capacity | Profit (% GDV) |                |                |
|------|------------|-----------------------------------|----------------|----------|----------------|----------------|----------------|
|      |            |                                   |                |          | Base           | 10% Affordable | 20% Affordable |
| 2    | SA14       | Syke Road                         | Wigton         | 25       |                |                | 25.43%         |
| 2    | SA24       | Rose Farm                         | Broughton      | 55       |                |                | 26.51%         |
| 2    | SA29       | Land to the west of Matty Lonning | Thursby        | 40       |                |                | 26.57%         |
| 3    | SA8        | Stainburn Road, Stainburn         | Workington     | 130      |                |                | 21.60%         |
| 3    | SA10       | Land off Seaton Road, Seaton      | Workington     | 150      |                |                | 23.26%         |
| 4    | SA9        | Main Road, Harrington             | Workington     | 115      |                |                | 22.15%         |
| 4    | SA11       | Former Southfield School          | Workington     | 65       | 19.71%         | 17.90%         | 14.91%         |
| 4/5* | SA23       | land adj Meadowlands              | Broughton Moor | 25       | 22.11%         | 20.20%         | 17.65%         |
| 5    | SA13       | Whitcroft                         | Maryport       | 300      | 20.69%         | 18.97%         | 15.68%         |
| 5    | SA15       | Adj Rugby Club, Station Road      | Aspatria       | 60       | 20.21%         | 18.54%         | 15.40%         |
| 5    | SA16       | Land at Noble Croft               | Aspatria       | 100      | 21.73%         | 20.11%         | 17.04%         |
| 5    | SA17       | Land off Station Road             | Aspatria       | 20       | 20.78%         | 19.05%         | 16.37%         |
| 5    | SA18       | Brayton road                      | Aspatria       | 10       | 18.32%         |                |                |
| 5    | SA25       | Rear of Marona, West Lane         | Flimby         | 10       | 19.72%         |                |                |
| 5    | SA28       | Rear of Bank House                | Prospect       | 25       | 22.73%         | 20.82%         | 18.28%         |
| 6    | SA19       | Fell View                         | Silloth        | 20       | 20.01%         | 18.26%         | 15.54%         |
| 6    | SA20       | Land adj to Wheatsheaf Inn        | Abbeytown      | 35       | 18.61%         | 16.73%         | 13.98%         |
| 6    | SA21       | Land at Main Road                 | Abbeytown      | 5        | 9.04%          |                |                |
| 6    | SA22       | Land at Abbey Road                | Abbeytown      | 15       | 18.58%         | 16.61%         | 14.33%         |
| 6    | SA26       | Lynholme                          | Kirkbride      | 45       | 18.16%         | 16.21%         | 13.43%         |
| 6    | SA27       | Birch Hall Lane                   | Kirkbride      | 6        | 13.03%         |                |                |

**Excluding M4 Requirements**

**Including M4 Requirements**

| Profit (% GDV) |                |                |
|----------------|----------------|----------------|
| Base           | 10% Affordable | 20% Affordable |
|                |                | 25.32%         |
|                |                | 26.30%         |
|                |                | 26.36%         |
|                |                | 21.38%         |
|                |                | 23.04%         |
|                |                | 21.88%         |
| 19.46%         | 17.64%         | 14.64%         |
| 21.99%         | 20.08%         | 17.53%         |
| 20.43%         | 18.70%         | 15.40%         |
| 19.96%         | 18.29%         | 15.13%         |
| 21.48%         | 19.85%         | 16.77%         |
| 20.66%         | 18.93%         | 16.24%         |
| 18.19%         |                |                |
| 19.60%         |                |                |
| 22.60%         | 20.70%         | 18.15%         |
| 19.88%         | 18.13%         | 15.41%         |
| 18.36%         | 16.46%         | 13.71%         |
|                |                |                |
| 18.45%         | 16.48%         | 14.20%         |
| 17.91%         | 15.94%         | 13.15%         |
|                |                |                |

| Key   |  |
|---|--|
|  | Profit > 20% GDV (Sites 20 or more dwellings)<br>Profit > 17.5% GDV (Sites less than 20 dwellings) |
|  | Profit 15% - 20% in accordance with current PPG  |
|  | Profit < 15% GDV   |