



FERMANAGH AND OMAGH

Position Paper Two

Housing

November 2014

Accommodating Housing Growth across Fermanagh and Omagh Council

Purpose: To provide the Shadow Council with an overview of the current housing situation in the Fermanagh and Omagh District Area and to consider the housing requirements up to 2030.

Content: The paper provides:-

- (i) the regional policy context for formulating Local Development Plan housing strategies and policies ;**
- (ii) a profile of the housing stock in Fermanagh and Omagh District;**
- (iii) an overview of the Housing Growth Indicators and how these can be notionally allocated; and**
- (iv) an understanding of housing allocations, existing housing supply and the need for additional zoning**

Recommendation: That the Shadow Council consider the findings and considers how future housing growth should be apportioned across settlements and the countryside.

1.0 Introduction

1.1 This is the second of four papers aimed at:

- building the capacity of members to make informed planning decisions, particularly within the plan making context;
- providing baseline information which will inform planning policy making at local level; and
- linking with important ongoing work in relation to the development of a Community Plan and other strategic work being undertaken by the Council.

1.2 The purpose of this paper is to inform the newly formed Shadow Council for Fermanagh and Omagh on how housing land provision will be addressed in the future. This paper sets out the regional context for housing, outlining the current situations regarding population and housing and the implications of new household formation and population growth in the Plan area. It provides an indication of how housing growth could be allocated across the settlement hierarchies of each district, taking into account the directions for balanced growth as set out in the RDS. It then addresses land availability for housing

across Fermanagh-Omagh using information from the Annual Urban Housing Land Availability Summary. It examines the take up of zoned land within the current development plans and the amount of land remaining available for development and identifies whether any additional land is required to 2030. This paper allows members to commence consideration of a housing growth strategy and to understand the options for allocating housing growth and the potential consequences of such allocations. However, at this stage the paper only aims to provide a foundation for future decision making which will need to be further informed by more detailed evaluation of the individual settlements, a sustainability assessment and public consultation.

2.0 Regional Policy Context

2.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and local housing policy is provided in the following sections.

(a) Regional Development Strategy

2.2 Prior to the publication of the Regional Development Strategy (RDS 2025), housing need was estimated by means of a “Predict and Provide” approach. District housing need was estimated by projecting trends in population and average household size, also taking into account house construction rates. The RDS introduced fundamental and significant changes to the manner in which area plans must now provide for future housing requirements. The approach now taken is known as “Plan, Monitor and Manage” which seeks to ensure that plans become more sustainable, balanced and integrated.

2.2 The RDS 2035 sets policy directions for the provision of housing that aim to deliver development in a more sustainable manner. This means growing population and providing additional housing in the Hubs (SFG 12) and sustaining rural communities living in smaller settlements (i.e. smaller towns and villages) and the open countryside (SFG 13). It also provides Regional Guidance for housing development recognising the need to: -

- strengthen community cohesion through fostering a stronger community spirit and sense of place and encouraging mixed housing development (RG 6);
- support urban renaissance by encouraging and bringing forward under-utilised land and buildings, particularly for mixed use development and promoting regeneration in areas of social need (RG 7); and
- manage housing growth to achieve sustainable patterns of residential development by promoting more sustainable development within existing urban areas and ensuring an adequate and available supply of quality housing to meet the needs of everyone (RG 8).

- 2.3** Achieving balanced communities and strengthening community cohesion means the provision of good quality housing offering a variety of house types, sizes and tenures to meet different needs and development that provides opportunities for the community to share in local employment, shopping, leisure and social facilities which are fundamental to the building of more balanced communities. In the first paper to Members on Population and Growth, the importance of providing housing to meet the needs of different groups was highlighted both in terms of families and single people. It was apparent that both the rise in elderly people, declining family sizes and young people starting out was going to lead to increased demand for smaller units, which should be incorporated into new housing along with family housing to create more balanced communities.
- 2.4** The RDS emphasises a sustainable approach to housing growth, setting of a regional target of 60% of new housing to be located in appropriate “brownfield” sites within the urban footprints of settlements greater than 5000 population (RG 8). Brownfield land may encompass vacant or derelict land, infill sites and land occupied by redundant or underused buildings. Therefore, more housing through the recycling of land and buildings within existing urban areas is promoted. Councils are also required to take account of existing vacant housing and needs identified in the Housing Needs Assessment/Housing Market Analysis when allocating land. This includes land for social and intermediate housing such as shared ownership and affordable housing.
- 2.6** The RDS identifies regional housing needs as Housing Growth Indicators (HGIs) across Northern Ireland. HGIs have been produced as a guide for the preparation of development plans and the figures are an estimate of the new dwelling requirement for the existing District Councils for the period 2008-2025. The HGI has been set at 6,800 dwellings for Fermanagh and 6,100 in Omagh District. When projected on a pro rata basis to 2030, the figures are 8,800 for Fermanagh District and 7,895 for Omagh District.
- 2.7** The RDS leaves the issue of how the HGI should be allocated across the settlements and to the open countryside as a matter for each Council to consider, taking into account its spatial framework guidance (SPG). This puts the focus on existing settlements by:-
- taking into account the roles and functions of each settlement (SPG10)
 - putting the hubs as the primary focus of growth both in terms of economic development opportunities and population (SPG11 and 12)
 - recognising the need to sustain rural communities living in smaller settlements and the open countryside, by consolidating and revitalising small towns and villages in their role as local service centres (SPG 13).
- 2.8.** To aid consideration the RDS provides a Housing Evaluation Framework for considering growth, based on a series of tests on each settlements’ resources, environmental capacity, transport links, economic development potential, character, and community services.

(b) Regional Planning Policy Statements

- 2.9** The RDS is complemented by the DOE's Planning Policy Statements, the most relevant of which is PPS12 Housing in Settlements. This document is to be replaced by the Strategic Planning Policy Statement (SPSS), a Draft of which was issued for consultation in February 2014. The draft SPSS does not represent a significant change to housing policy but helps to shorten and simplify the guidance for Councils. Both PPS 12 and the Draft SPSS set regional policy objectives underpinning the RDS and equally relevant to local development plans, in terms of:
- managing housing needs in response to changing need;
 - directing and managing growth to achieve more sustainable patterns of residential development;
 - promoting a drive for more housing within urban areas;
 - encouraging increased density appropriate to the scale and design of cities and towns of Northern Ireland.
- 2.10** The statements reiterate that in making housing allocations Councils should apply the RDS Housing Evaluation Framework and take account of the Housing Needs Assessment (NIHE), existing commitments (built, approved, and likely to be approved) and potential windfall. It also advises that in preparing a plan a council should undertake an urban capacity study and where appropriate transport assessments.
- 2.11** The guidance sets a sequential approach to site identification, adopting existing urban sites first, before expansions to towns and cities and treating major expansion of a village or small rural settlement only in exceptional circumstances, and the creation of new settlements in the last resort.
- 2.12** PPS 12 also sets out the role of development plan in terms of meeting social housing needs through either the zoning of land or the outlining of key site requirements through the development plan process.
- 2.13** In relation to Housing in the Countryside, the Draft SPSS adopts a similar approach to PPS21 Sustainable Development in the Countryside, setting policy objectives aimed at:-
- supporting a vibrant rural community;
 - conserving the landscape and natural resources of the rural area;
 - protecting the landscape from excessive, inappropriate or obtrusive development and from the actual or potential effects of pollution;
 - facilitating development which contributes to a sustainable rural economy; and
 - promoting high standards in the design, siting and landscaping of development.
- 2.14** The Draft SPSS also adopts a policy approach based on clustering, consolidating, and grouping new development, particularly new residential development, with existing established buildings and the re-use of previously used land and buildings.

- 2.15** It is therefore reasonable to assume that the Plan Strategy should reflect the aim, objectives and policy approach of the Draft SPPS, but tailored to the specific circumstances of Fermanagh and Omagh. These specific circumstances can be identified through:
- Analysis of key assets or features of their rural community
 - Environmental assets appraisal
 - Landscape assessment.
- 2.16** The Draft SPPS suggests that in areas where there is a need to protect landscapes from excessive development Country Policy Areas may be introduced. Alternatively, Dispersed Rural Communities ease controls on rural housing can be identified in the countryside giving consideration to remoteness, evidence of community, activity associated with a focal point (schools, sports clubs, public houses) and has an established dispersed pattern of development). It also advises that Councils should formulate policy to address the need to ensure that:
- development in the countryside integrates into its setting,
 - respects rural character, and
 - is designed appropriate to the local area.
- 2.17** Other regional policies relevant to housing policy currently contained in PPS 7 Quality Residential Environments and PPS 8 Open Space, Sport and Outdoor recreation, are also reflected in the SPPS and are primarily concerned with issues related to design and layout. Draft Planning Policy Statement 22 (PPS 22) deals with Affordable Housing. These matters will be addressed in later papers.

(c) Supplementary Planning Guidance

- 2.18** In addition to regional policy, supplementary planning guidance for residential development is provided by 'Creating Places - Achieving Quality in Residential Development' (May, 2000). It is the principal guide for use by prospective developers in the design of all new housing areas. DCAN 8: Housing in Existing Urban Areas, will also be material to the determination of planning applications for small unit housing within existing urban areas.
- 2.19** The 'Living Places: An Urban Stewardship and Design Guide for Northern Ireland' (September 2014) sets out the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing and making urban places, with a view to raising standards across Northern Ireland.
- 2.20** In conclusion, the role of the development plan is to provide housing land in accordance with the RDS. This means zoning sufficient housing land in the larger settlements and providing sufficient opportunities including Housing Policy Areas (HPAs) in smaller settlements to meet the housing growth indicators. It also means ensuring that there is an adequate range of sites at suitable locations to provide a mix of house types and tenures to meet

population needs. This paper focuses on identifying what the local housing needs are in relation to overall numbers and special needs. In demonstrating that the HGI is sufficient to cater for the needs of a growing population, the paper then examines how the HGI should be distributed across settlements under the provisions of the RDS and PPS 12 in order to promote sustainable and balanced growth.

3.0 Fermanagh and Omagh Area Plans

- 3.1** In terms of housing provision, the dominance and strategic importance of the main towns of Enniskillen and Omagh within their respective districts was recognised in the Settlement Strategy of each Plan. In addition to land zoned for housing, the urban areas defined within the development limits of the main and local towns contained significant areas of unzoned or white land. In both Plans, the housing objectives were to identify sufficient land for new housing in the main and local towns to provide a choice of housing sites in convenient locations to support a range of dwelling types to meet different housing needs, and to protect the character of existing residential areas. Land was not zoned in villages or smaller settlements in order to allow flexibility.
- 3.2** Within most of the designated villages, it was anticipated that demand for development would be limited and primarily for housing and in keeping with the size and character of the settlement. The Omagh Area Plan also designated smaller settlements or hamlets based on a number of specified criteria. It was envisaged that these would be suitable for the development of small groups of houses and single dwellings. The scale of development was expected to be commensurate with the character of the hamlet.
- 3.3** The Annual Housing Monitor provides an overall picture of the amount of land that has been developed on zoned housing land. Within Enniskillen Town, approximately 170 hectares of land were allocated for housing. However, the development of the South-West Acute Hospital on zoning H13 has reduced the overall total of zoned housing land to approximately 155 hectares (Table 1). The Housing Monitor 2013 confirms that 34.6% of this housing land has been developed with approximately 102 hectares remaining. Of the 32 zoned housing sites, 9 are complete and 22 may be described as 'active' in that work has already commenced or a planning permission has been obtained or applied for on part or all of the land. In Irvinestown, only 18% of the 29 hectares of land zoned for housing has been developed with 3 sites complete and a further 6 of the 11 zoned sites described as 'active'. In Lisnaskea, 37% of the 50 hectares of housing land zoned has been developed, with one of the 13 sites complete and 11 are 'active'. A small portion (0.7 hectares) of housing zoning H5 has been developed for a non-residential use (Appendix 1).

Table 1: Zoned Housing Land Uptake 2013 – Fermanagh Towns

Settlement	Total Area (ha)	Area Developed (ha)	Units Complete	Area Remaining (ha)	Remaining Units
Enniskillen	155.83	54.00	947	101.84	1686
Irvinestown	29.01	5.34	98	23.67	361
Lisnaskea	50.68	18.75	261	31.93	520
Total District	235.52	78.09	1,306	157.44	2,567

Source: 2013 Housing Monitor Reports

- 3.4** Within Omagh Town, some 213 hectares of land were allocated for housing of which 56% has been developed, with approximately 94 hectares remaining (Table 2). Of the 27 zoned housing sites, 8 are complete and a further 16 may be described as ‘active. In Fintona, only a small amount of zoned land has been developed (6%) with 5 of the 6 zoned sites ‘active’. In contrast, Dromore has 59% of its zoned housing land developed with 5 of its 6 sites ‘active’ and one site completed. In Carrickmore, the smallest of the three local towns, approximately a third (33.5%) of the zoned land has been developed. Only one of the six sites is complete and although the remaining five may be described as ‘active’, three have only outline planning permission (Appendix 1).

Table 2: Zoned Housing Land Uptake 2013 – Omagh Towns

Settlement	Total Area (ha)	Area Developed (ha)	Units Complete	Area Remaining (ha)	Remaining Units
Omagh	213.41	119.24	1504	94.17	1437
Fintona	18.6	1.1	12	17.5	247
Dromore	17.36	10.25	162	7.11	101
Carrickmore	10.22	3.43	45	6.79	103
Total District	259.59	134.02	1,723	125.57	1,888

Source - 2013 Housing Monitor Reports

- 3.5** However, in terms of delivering new housing, the new local development plan is required to take into account the number of houses built within the RDS period i.e. from 31st March 2008 rather than an examination of zoned housing land uptake since a Plans’ adoption. This is explored further under Section 6.0 Accommodating Housing Growth.

4.0 A Profile of the Housing Stock in Fermanagh and Omagh Districts

- 4.1 Planning has a role in providing for a mixture of tenures, housing types and providing access to affordable housing. Therefore a profile of existing housing stock in terms of tenure, type, affordability, occupancy and unfitness needs to be considered.
- 4.2 As reported in the Population and Growth Paper, the rate of population growth between 2001 and 2011 in both districts was just below the NI average of 7.5%. In contrast, during the same period, the number of households in each district has increased by 13% to 23,069 in Fermanagh and by 14% to 18,443 in Omagh. Therefore, the number of households across Fermanagh-Omagh was increased by an average of 13.5%, rising from a total of 36,577 in 2001 to 41,512 in 2011. This is due to a trend towards smaller household sizes with the average household size decreasing between 2001 and 2011 from 2.78 to 2.65 in Fermanagh and from 2.91 to 2.76 in Omagh. The growing number of elderly is a key factor in declining average household size along with a decline in the number of children. By 2011, almost 55% of households in Fermanagh and Omagh were occupied by 1-2 persons. When planning for future housing stock, this trend for smaller households and an increase in the number of houses needs to be taken into account as well as providing for sheltered and other housing designed to meet the needs of an ageing population.
- 4.3 It should be noted that in 2001, less than 30% of households in Fermanagh District were located in Enniskillen town, compared to almost 50% of households in Omagh District locating in Omagh town. The proportion of households in 'other settlements' i.e. villages and hamlets also differs between the two districts with almost 25% of households in Fermanagh to be found in these settlements compared to under 10% in Omagh district (Table 3). The figures also serve to illustrate the strength that Omagh town exerts within its district compared to Enniskillen and the importance of the network of villages in Fermanagh in serving a large scattered rural population.

Table 3: Population and Household Distribution in 2001

	Fermanagh District		Omagh District	
	Population	Households	Population	Households
Main Town or Hub	13,560 23.6%	5,772 28.2%	19,836 41.4%	7,719 47.9%
Local/Small Towns	4,527 7.8%	1,821 8.9%	3,039 6.3%	1,206 7.5%
Other settlements	12,609 21.9%	5,031 24.6%	4,023 8.4%	1,479 9.2%
Countryside	26,831 46.6%	7,830 38.3%	21,054 43.9%	5,719 35.4%
TOTAL	57,527	20,454	47,952	16,123

Source - NISRA

Housing Tenure

- 4.4 In 2001, the House Condition Survey recorded that most of the houses in Fermanagh and Omagh were owner occupied and these figures were above the regional average (Table 4). Fermanagh and Omagh Districts had a lower than average proportion of NIHE, Housing Association and privately rented dwellings, yet had a much higher proportion of vacant houses – 13.1% and 8.1% respectively compared to 4.9% for NI. However, in 2006 the proportion of privately rented and other dwellings in Fermanagh and Omagh districts was well above the regional average with the proportion in owner occupation declining (Table 5). The proportion of vacant properties also remained higher than the regional figure of 5.7%.

Table 4: Housing Tenure in 2001

District	Owner occupied	NIHE	H.A.	Private Rented & other	Vacant	Total
Fermanagh	14,870 67.2%	2,470 11.1%	360 1.6%	1,520 6.9%	2,900 13.1%	22,120
Omagh	11,330 68.4%	2,450 14.8%	250 1.5%	1,220 7.4%	1,350 8.1%	16,600
Northern Ireland	432,270 66.8%	115,980 17.9%	17,930 2.8%	49,410 7.6%	31,940 4.9%	647,530

Table 5: Housing Tenure in 2006

District	Owner occupied	NIHE	H.A.	Private Rented & other	Vacant	Total
Fermanagh	14,600 63.7%	2,060 9.0%	280 1.2%	3,490 15.2%	2,470 10.8%	22,900
Omagh	11,390 59.4%	1,990 10.4%	300 1.6%	3,270 17.1%	2,200 11.5%	19,150
Northern Ireland	468,860 66.5%	93,440 13.3%	21,530 3.1%	80,870 11.5%	40,300 5.7%	705,000

Source: Housing Condition Survey 2001 and 2006. H.A. – Housing Association

- 4.5 The 2011 House Condition Survey (HCS) indicates that the proportion of owner-occupied housing stock in Northern Ireland has continued to decline (61.7% compared to 66.5% in 2006) with an increase in private rented properties and others from 11.6% in 2006 to 16.5% in 2011. The social rented sector accounted for 14.3% of total stock (NIHE -11.3%, HA- 3%). The level of vacant stock has risen (7.2%) in line with growth in the private rented sector. Data from the HCS has not been released at local government level but housing tenure data from the 2001 and 2011 Census would appear to mirror these findings in that there has been a slight decline in the proportion of owner occupation as well as social housing stock with an increase in private rented accommodation (Table 6).

Table 6: Housing Tenure in 2011 Census

	Owner Occupied	Social Housing	Private Rented and Others	Total Households
Fermanagh	16,782 72.7% (74.1%)	2,170 9.4% (15.5%)	3,361 14.6% (10.4%)	23,069
Omagh	12,941 70.2% (72%)	1,813 9.8% (15.7%)	3,116 16.9% (12.3%)	18,443
Fermanagh & Omagh	29,723 71.6%	3,983 9.6%	6,477 15.6%	41,512
N Ireland	474,751 67.5% (69.6%)	104,885 14.9% (21.2%)	106,016 15.1% (9.2%)	703,275

Source: Census 2011 (% figures in () are from 2001 Census)

- 4.6** NISRA suggests that the key drivers in the increased demand for private rented accommodation are likely to have been: inward migration from EU accession countries; housing affordability issues associated with the mid-2000s upsurge in Northern Ireland house prices; and the particularly adverse impact on the Northern Ireland housing market of the post-2007 economic downturn, which has seen a marked reduction in property values, risk aversion among mortgage lenders and reduced confidence among prospective house purchasers, and, as a result, many households electing to rent rather than buy.

Housing Types

- 4.7** The mix of housing types has also changed slightly between 2001 and 2011. Both Fermanagh and Omagh Districts have a significantly higher than average proportion of bungalows and detached dwellings (Tables 7 & 8) which is in contrast to regional averages. This is partly due to the large proportion of housing in the countryside and partly due to the nature of post war, private sector housing development in settlements. Both districts experienced slight increases in the proportion of detached and semi detached dwellings and bungalows and a slight decrease in terraced houses.

Table 7: Households by Type 2001

District	Detached	Semi Detached	Terraced	Flats	Other*	Total
Fermanagh	12,446 60.84%	4,072 19.9%	2,969 14.5%	543 2.65%	424 2.07%	20,454
Omagh	9,261 57.44%	3,311 20.5%	2,790 17.3%	509 3.1%	252 1.56%	16,123
Northern Ireland	230,406 36.76%	174,781 27.9%	169,433 27%	42,830 6.83%	9,208 1.47%	626,658

Source: NISRA - Census 2001 * Other includes caravan, mobile or temporary structure or shared dwelling

Table 8: Households by Type 2011

District	Detached	Semi Detached	Terraced	Flats	Other*	Total
Fermanagh	14,138 61.3%	4,947 21.4%	3,097 13.4%	831 3.6%	56 0.3%	23,069
Omagh	11,094 60.1%	3,860 21%	2,717 14.7%	748 4%	24 0.2%	18,443
Northern Ireland	264,307 37.6%	200,577 28.5%	174,896 24.8%	62,386 8.9%	1,109 0.2%	703,275

Source: NISRA - Census 2011 * Other includes caravan, mobile or temporary structure or shared dwelling

Social Housing and Affordability

- 4.8** A gap in market provision can occur if house prices rise beyond that which is affordable. Affordability is determined by price, average incomes and access to borrowing and it remains an issue for first time buyers.
- 4.9** Since 2001, the Housing Executive has published an affordability index developed in partnership with Ulster University (formerly University of Ulster) to provide an evidence base for how changes in the housing market were affecting first-time buyer's ability to enter the market. Following a review in 2013, this affordability index has been refined and now uses the concept of an Affordable Limit (AL) to capture the ratio of the maximum allowable loan to income and assumes that the maximum monthly income which can be dedicated to repaying the mortgage is 35 per cent.
- 4.10** The emerging findings indicate that affordability over the period 2010-2012 has improved significantly across most housing market areas, particularly Fermanagh & Omagh, where the percentage of affordable homes for first time buyers was 73% in 2012 compared to only 42% in the neighbouring housing market areas of Magherafelt, Cookstown & Dungannon and 32% in Derry, Strabane & Limavady (Table 9)

Table 9: NI Repayment Affordability 2010-2012

Housing Market Areas	2010		2011		2012	
	Afford Gap (£)	% Unafford	Afford Gap (£)	% Unafford	Afford Gap (£)	% Unafford
Fermanagh & Omagh	40,667	46	44,101	47	50,949	27
Magherafelt, Cookstown & Dungannon	17,667	51	26,101	62	19,461	58
Derry, Strabane & Limavady	435	73	2,987	72	5,832	68

Source: Northern Ireland Housing Market Review & Perspectives 2014-2017

- 4.11** Although there have been significant reductions in house prices everywhere since 2007, affordability remains an issue for first time buyers who continue to experience difficulties in securing mortgages. Falling household incomes and an increasing level of unemployment have an impact on the housing market and the ability of first time buyers to enter the market. The private rented sector therefore remains popular.
- 4.12** When examining affordability, it is important to note that planning cannot control house prices which are primarily influenced by factors such as interest rates and the availability of lending. Therefore, affordability in both urban and rural areas and meeting the needs of migrant workers, single parents, young people and the elderly is addressed through the provision of social housing. Neither of the existing area plans addresses social housing need as they did not zone sites for social housing and therefore its provision is dealt with through the development management process.
- 4.13** The NIHE waiting list can be utilised to determine the pressure for social housing in an area. In Fermanagh District, 88% of those categorised as being in “housing stress” were accommodated in 2014, compared to almost 91% in Omagh District (Table 10). In both Districts, only 30% of those who applied for social housing were allowed housing. This shows there is a demand for more social housing provision in Fermanagh District.
- 4.14** In Fermanagh District, 54% of those in housing stress were single whereas in Omagh District the figure was 64%. In both districts, most of the remainder comprised of small families and older people indicating a need for smaller housing units.

Table 10: Housing Applicants on Waiting List in March 2014

District	NIHE Housing Stock	Waiting List Applicants	Number in Housing Stress	Total Allocations
Fermanagh	1,979	805	292(36%)	258
Omagh	1,776	619	142(23%)	129

Source: - NIHE - Fermanagh & Omagh District Housing Plans 2014-2015

- 4.15** Social housing need is also met by Housing Associations. The Census 2011 indicates that social housing stock (NIHE and housing associations) accounts for 2,170 dwellings in Fermanagh and 1,813 dwellings in Omagh representing 9.4% and 9.8% respectively of the total housing stock which is considerably less than the Northern Ireland figure of 14.9%.
- 4.16** Social housing needs are influenced by affordability of housing, accessibility to finance, job/income status and family circumstances. NIHE based the most recent annual Housing Needs Assessment (HNA) on the March 2014 waiting list. Fermanagh District currently requires 48 units distributed across six

settlements including Enniskillen (Table 11) and Omagh District requires 15 units in Omagh town. Social housing plans for 200 houses at the Grosvenor Barracks site in Enniskillen could provide more than a 5-years supply for the town based on current social housing needs.

Table 11: Social HNA 2013-2018 in Fermanagh

Settlement	5 year Projected Social Need
Enniskillen	35
Ballinamallard	4
Belleek	2
Brookeborough	1
Derrylin	4
Kinawley	2
TOTAL	48

Source: - NIHE - Fermanagh District Housing Plans 2014-2015

Specialised Housing Need

- 4.17** People present themselves as homeless for many reasons, the causal factors of which may include marriage/house sharing breakdown, family/relationship disputes and unsuitability of accommodation. NIHE, Housing Associations and other agencies are responsible for providing temporary accommodation for homeless people, Travellers as well as the provision and allocation of “supported housing”, which also provides rehabilitation for those who are elderly or disabled.

Table 12: Levels of Homelessness 2009/10 – 2013/14

		Number Presented	Awarded Full Duty Status*	
2009/10	Fermanagh District	409	187	45.7%
	Omagh District	119	24	20.1%
2013/14	Fermanagh District	374	175	46.8%
	Omagh District	188	56	29.8%

Source: Fermanagh & Omagh District Housing Plans 2014-2015 (NIHE)

* Statutory Homeless

- 4.18** The number of people who present themselves as homeless and those who are assessed as having Full Duty Status is higher in Fermanagh district compared to Omagh (Table 12). No social housing need has currently been identified for Travellers in either Fermanagh or Omagh District (NIHE). The third Comprehensive Traveller Needs Assessment is due for completion in

2014 following which a new five year Traveller Accommodation Programme will be developed.

- 4.19** NIHE assists vulnerable people through its “Supporting People” programme offering long term support (sheltered accommodation and homes for life) and short term support (temporary accommodation).

Vacancy and Unfitness Levels

- 4.20** In order to translate the increase in households into a need for new housing units, account needs to be taken of vacancy levels and unfitness rates. The housing stock of an area includes occupied, vacant and unfit dwellings, which all influence the need for additional housing stock.
- 4.21** Apart from new-builds not yet occupied, properties may be empty for a number of reasons. With the collapse of the housing market in current times, some may be pending re-sale or re-letting. Some may be unfit for habitation or are pending repair or improvement whilst others may be second homes not permanently occupied. These properties are currently out of use and therefore reduce the supply of available housing. In order to address this, DSD in partnership with NIHE launched in September 2013 a new five year Empty Homes Strategy and Action Plan aimed at bringing empty homes back into use. It is estimated that there are around 32,000 empty homes across Northern Ireland.
- 4.22** Although the House Condition Survey 2011 does not provide vacancy rates at district level, it does distinguish between urban and rural areas. The overall regional vacancy rate is 7.2% of total housing stock but the rate in rural areas (defined as small rural settlement and isolated rural) is 12.4% compared to 5.1% for district towns. The Census 2011 reported that there were 2,097 empty dwellings in Fermanagh District and 1,277 empty dwellings in Omagh District representing 8.3% and 6.5% respectively of the total housing stock compared to a NI average of 6.0%. There is obviously scope to bring some of these vacant dwellings into use to contribute to the housing stock.
- 4.23** In 2009 the proposed new council area of Fermanagh and Omagh District had the highest level of unfitness at 6.6% of dwellings compared to a regional average of 2.4%. Mid-Ulster Council Area had the second highest level of unfitness at 5.1% and Derry City and Strabane Council Area had the second lowest at 0.6%. The 2011 HCS suggests that the NI regional average of unfitness is 4.6%.
- 4.24** In 2011, the proportion of vacant dwellings in Northern Ireland recorded as unfit was 51% (28,000) compared to 44% (14,000) in 2001 demonstrating a clear link between unfitness and occupancy levels. In general there are more unfit dwellings in rural areas than urban areas and particularly in more isolated areas.

Conclusions

4.25 In relation to tenure, type, affordability, occupancy and unfitness, it can be concluded that:-

- with an ageing population, there is a need to provide smaller house types e.g. two-bedroom houses;
- the private rented sector does not require planning intervention other than the control of Houses in Multiple Occupation;
- social housing can be addressed through the development management process provided there is a strategic policy in the local development plan to facilitate this; and
- unfitness can be addressed through the provision of policies on the renovation and improvement of dwellings.

5.0 The Need for Additional Housing Stock

5.1 The Housing Growth Indicators for 2008-2025 have been set at 6,800 dwellings in Fermanagh and 6,100 in Omagh District. When projected further to 2030, the figures are 8,800 for Fermanagh and 7,895 for Omagh creating a total HGI of **16,695** for 2008-2030.

5.2 To examine whether this is acting as a constraint on growth, an examination has been undertaken using two methodologies based on past growth rates and household projections as follows:-

- (i) For the 10-year period between the 2001 and 2011 censuses, the number of households in Fermanagh-Omagh grew from 36,577 to 41,512, representing a 13.5% growth rate. If applied to the period 2008-2030, the number of additional households created could be **12,930** which is less than the projected HGI figure.
- (ii) Alternatively, taking NISRA's household projections for 2008-2023 which take account of population growth, a reduced size of household and the changing age structure of the population, the number of households in Fermanagh-Omagh could increase by an additional **11,900** households between 2008 and 2030 (Table 13). This figure is also much lower than the projected HGI figure.

5.3 Both methods suggest a growth much lower than the HGI suggesting that Fermanagh-Omagh is not being constrained by the RDS housing growth indicator. The NISRA projections also predicted that the total number of households in Fermanagh-Omagh in 2011 would be 43,000, which is slightly higher than the actual census figure. The recently released 2012-based population projections for the 11 new council districts indicate lower levels of growth than suggested by the 2008-based projections. The population for

Table 13 – Household Projections

	2008	2010	2015	2020	2025*	2030*
Fermanagh District	23,100	23,600	25,000	26,200	27,500	29,000
Omagh District	18,300	18,800	20,300	21,500	22,800	24,300
Both Districts	41,400	42,400	45,300	47,700	50,300	53,300
NI	688,700	706,400	749,200	786,800	826,600	868,800

Source: - NISRA

*The projections for 2025 and 2030 were calculated using the percentage change between 2022 and 2023 and applied year on year (Fermanagh =1.12%; Omagh=1.37%; both districts = 1.24%)

Fermanagh-Omagh in 2030 is projected to be 121,500 compared to 129,000 as set out in the Population and Growth paper. It is therefore anticipated that the 2012-household projections when released later in the year will also show lower levels of growth. In the meantime, the number of households that might be created based on the projected population figure of 121,500 can be estimated by applying an average household size of 2.52 (from 2008-based household projections for 2023). This suggests that there may be 48,200 households by 2030 compared to 53,300 as shown in Table 13. It can be concluded that the HGI figure is more than adequate to meet future housing needs.

6.0 Accommodating Housing Growth

Options for Allocating Housing Growth

- 6.1** As stated in the RDS, the allocation of housing growth to specific locations in a district is a matter for decision through the development plan process. In the allocation process, account must be taken of the roles and functions of each settlement; the hubs should be given the primary focus for growth; the need to sustain rural communities living in smaller settlements and the open countryside should be recognised and small towns and villages should be consolidated and revitalised in their role as local service centres.
- 6.2** Thus, how housing should be allocated across the settlement hierarchy should be based on the settlement growth strategy set out in the Population and Growth paper which aims to:-
- focus major population and economic growth on the main towns of Enniskillen and Omagh and consequently these towns will be the main focus for major new housing development;
 - provide balanced growth in the local /small towns in order to sustain, consolidate and revitalise them;
 - maintain villages as important local service centres to meet the daily needs of the rural area;
 - provide opportunities for individual dwellings or small groups of houses in the open countryside, small settlements or dispersed rural communities in order to sustain rural communities.
- 6.3** Although it is not possible at present to consider the precise allocation for any given settlement, it is reasonable to consider how housing should be apportioned across the various types of settlements taking into account regional policy, existing household levels and the preliminary settlement growth strategy. To aid discussion three options are identified (Tables 14 & 15) using the HGIs as projected to 2030, (i.e. 8,800 for Fermanagh and 7,895 for Omagh). These options are:
- Option 1 – this maintains the ‘status quo’ in each district being based on the proportion of households in the main town, local towns, villages and countryside at the time of the 2001 Census.
 - Option 2 – this represents an urban drive reflecting the RDS regional target of 60% of new housing to be located in “brownfield” sites of settlements greater than 5,000 population.
 - Option 3 – this represents a balance between options 1 and 2 with growth still focused on the hubs but recognising that rural communities must also be sustained.

In all three options, the proportions for the local towns, villages and smaller settlements remain the same reflecting the need to sustain, consolidate and revitalise these settlements.

Table 14: Accommodating Housing Growth in Fermanagh District 2008-2030

Settlement Category	Option 1		Option 2		Option 3	
	%	Units	%	Units	%	Units
Main Town	28.2	2,482	60	5,280	44	3,872
Local Towns	8.9	783	8.9	783	8.9	783
Villages	24.6	2,165	24.6	2,165	24.6	2,165
Countryside	38.3	3,370	6.5	572	22.5	1,980
Total	100	8,800	100	8,800	100	8,800

Table 15: Accommodating Housing Growth in Omagh District 2008-2030

Settlement Category	Option 1		Option 2		Option 3	
	%	Units	%	Units	%	Units
Main Town	47.9	3,780	60	4,737	55	4,342
Local Towns	7.5	592	7.5	592	7.5	592
Villages and smaller settlements	9.1	720	9.1	720	9.1	720
Countryside	35.5	2,803	23.4	1,846	28.4	2,241
Total	100	7,895	100	7,895	100	7,895

- 6.4** If Option 1 is pursued, it would not satisfactorily achieve the objective of the RDS to focus growth on the main hubs, particularly in Enniskillen and would result in continued high growth in the countryside rather than sustaining rural community needs.
- 6.5** In Option 2, given the existing proportions of the district households in Enniskillen and Omagh, this 60% target would be difficult to achieve over the lifespan of a plan. In particular, the allocation to the countryside in Fermanagh would a) not be sustainable for rural communities and b) would require a very strictly managed rural policy to control rural housing numbers.
- 6.6** Option 3 provides a more balanced approach with growth still focused on the hubs but at slightly lower levels than the 60% and recognising that rural communities must also be sustained. The share to the countryside may of course alter depending on whether any adjustments are made to existing settlement hierarchies.
- 6.7** Once a figure has been allocated for housing in the countryside, an element can be “planned for” through the designation of small settlements and, for the remaining land outside of these, it can be managed through rural planning policy. Apportioning more or less of the HGI to the main towns will impact on the proportion that is allocated to the countryside and Members need to decide what is an appropriate level of housing allocation for the rural area and a rural policy to manage it. This will be discussed later in the paper.

Housing Land Availability in the Settlements

6.8 Having looked at the options for allocating housing across the settlement hierarchy, it is necessary to examine how much land is available in the settlements. In terms of delivering new housing, planning is required to take into account the number of houses built within the RDS period rather than an examination of zoned housing land uptake since a Plans' adoption. Prior to 1st April 2008 when the new HGIs took effect, it is estimated that between 1st January 1999 and 31st March 2008, 2,800 dwellings were erected in the settlements of Fermanagh District with an estimated 2,700 dwellings built in the open countryside. In Omagh District, some 2,300 dwellings were built in the settlements with an estimated 2,200 dwellings built in the countryside (Table 16). The period up to the end of March 2008 reflects the high building activity and annual build rates before the current economic recession.

Table 16: Housing Completions in the RDS period 1998-2008

No of units built in period 31-12-1998 to 31-03-2008	Fermanagh District	Per Annum Build Rate	Omagh District	Per Annum Build Rate
Main Town	814	81	1,706	170
Local Towns	456	45	200	20
Villages	1,534	153	394	39
Total settlements	2,804	280	2,300	230
Countryside*	2,718	271	2,208	220

*Source: Annual Housing Monitor *Figures for countryside are estimated based on the number of full and reserved matters applications for rural dwellings. Total figure includes small settlements in Omagh District.*

6.8 From April 2008, coinciding with the start of the new HGI figures, building rates have steadily declined and this has been most noticeable within the settlements with an average annual build rate of 33 dwellings in Enniskillen and 28 in Omagh. In contrast, building in the countryside has been some five times higher (Table 17).

6.9 Planning permissions and unimplemented zonings provide opportunities for 8,998 dwellings in Fermanagh District. Of this figure, 3,418 are in Enniskillen and the remainder distributed across the local towns and villages. In Omagh District there is potential to accommodate 6,614 dwellings, of which 3,913 are in Omagh town and the remainder are in the local towns and villages including 700 dwellings in the smaller settlements (Table 17). These figures may be a

Table 17 Housing Completions in the RDS period 2008-2013

Settlement	Fermanagh		Omagh	
	Built in RDS period (31-03-08 to 31-07-13)	Potential Remaining (2013)	Built in RDS period (31-03-08 to 31-07-13)	Potential Remaining (2013)
Main Town	165	3418	141	3913
Local Towns	40	2056	7	915
Villages	229	3466	28	1060
Total Settlements	434	8998	176	5886
Countryside* (incl. Small settlements)	785	-	175 + 11= 186	726 *
District	1653	8998	538	6614

*Source: Annual Housing Monitor. Monitor *Figures for countryside are estimates up to 2010 and thereafter, figures are supplied by LPS. Note: * Figure of 726 relates to small settlements only.*

conservative estimate as the average density of 15 houses per hectare of land has been used where the number of units has not been specified in the permission. Given the trend towards higher densities such as 25 dwellings per hectare, the actual potential yield may be greater. In addition, there may be other land in the settlements which may suitable for housing development such as white land, infill or opportunity sites which currently does not have planning approval but could potentially yield additional dwelling units. This potential would be assessed as part of an Urban Capacity Study undertaken during plan preparation.

- 6.10** The existing housing land capacity could potentially provide a 23 year supply of housing land in Omagh town and a 43 year supply in Enniskillen based on average build rates from 1998-2008. In both main towns, there will be a need to zone additional housing land as current zoned land only accounts for 49% of the total housing supply in Enniskillen and 37% in Omagh. This need can be addressed by zoning existing urban sites (e.g. white land with planning permission) rather than an extension to the settlement development limits. Across the six local towns, there is a 45 year supply compared to the villages where potentially a 22 year supply is available in Fermanagh and a 27 year supply is available in the Omagh district. The remaining potential across both districts could also meet the remainder of the projected HGI figure of 16,695 which also assumes an element of rural housing. Omagh town currently has the capability of providing nearly 50% of its district HGI to 2030 whilst Enniskillen can provide nearly 39%.
- 6.11** Thus, there is a an adequate supply of housing land across the settlement hierarchy and more than sufficient to grow the small towns and villages at a level greater than needed to meet the RDS objective of consolidating and sustaining these service centres. However, it is important to compare housing land supply across the settlement hierarchy in relation to each of the three

options (Tables 14 & 15). In the following tables (Tables 18 & 19), dwellings built to date during the RDS period have been taken into account and the difference between each option and the remaining potential provides an indication of whether there is an over or under supply of housing.

- 6.12** If Option 1 is chosen, there would clearly be no shortage of land across the settlements, particularly in the two main towns. However, this option does not satisfactorily meet the RDS objective of focusing growth on the hubs whilst sustaining the small towns, villages and countryside. In both Options 2 and 3, the two main towns will have shortfalls but Option 3 will have a lesser impact. Given that the figures are indicative at this stage and an Urban Capacity Study has not yet been undertaken, it would be wrong to assume that there is no developable land remaining in the towns or other settlements. It may therefore be possible to accommodate new housing within the existing development limits through better utilisation of urban land and housing densities.

Table 18: District Housing Land Supply across the settlement hierarchy - Fermanagh

Settlement category	Built in RDS (31/03/08 to 31/07/13)	Potential remaining (2013)	Difference between HGI Option 1 and potential +/-	Difference between HGI Option 2 and potential +/-	Difference between HGI Option 3 and potential +/-
Main Town	165	3,418	+1,100	-1,697	-289
Local Town	40	2,114	+1,371	+1,371	+1,371
Villages	229	3,466	+1,530	+1,530	+1,530
Settlement total	434	8,998	+4,001	+1,204	+2,612

Table 19: District Housing Land Supply across the settlement hierarchy – Omagh

Settlement category	Built in RDS (31/03/08 to 31/07/13)	Potential remaining (2013)	Difference between HGI Option 1 and potential +/-	Difference between HGI Option 2 and potential +/-	Difference between HGI Option 3 and potential +/-
Main Town	141	3,913	+274	-683	-288
Local Town	7	915	+330	+330	+330
Villages and small settlements	39	1,786	+1,105	+1,105	+1,105
Settlement total	187	6,614	+1,709	+752	+1,147

- 6.13** With regard to other settlements where there appears to be ample provision of land for residential development within existing development limits, there may be an unacceptable over-provision if this land were to be comprehensively

developed for housing estates. Thus there will be a continued need to control housing supply and possible courses of action may include:

- a) reduce development limits;
- b) introduce further controls on residential development on unzoned or 'white' urban land;
- c) reinforce and/or revise the policies to ensure that any housing development is 'in scale and character' with that site and settlement.

Rural Housing

- 6.14** Within the HGI figure, an allowance will also have to be made for dwellings in the countryside. Unlike the urban housing monitor, there is currently no rural housing monitor undertaken to assess the quantum of houses being built in the countryside and therefore an estimate of the potential supply of rural houses can only be made based on the number of applications approved. However, in terms of the HGI figure, it should be noted that between April 2008 and March 2014 (the current RDS period), 1,846 rural dwellings (Full and RM) have been approved in Fermanagh and 1,244 in Omagh (Table 20).
- 6.15** Approvals for rural houses are currently influenced by the policies set out in PPS 21 (2010), the aim of which has been to manage growth in the countryside to achieve development in a sustainable manner that meets the essential needs of rural communities. Although it will be a matter for the new Council to bring forward its own strategy for development in the countryside after April 2015, this must reflect the aim, objectives and policy approach of the Strategic Planning Policy Statement (SPPS).
- 6.16** Prior to 2006 and the introduction of PPS 14, it has been estimated that between 90% and 95% of dwellings approved in rural areas were completed or at least started within 5 years¹. In anticipation of a revised rural policy, a high volume of speculative outline planning applications was received between 2004-05 and 2006-07. In Fermanagh, 3,336 outline applications were received during this period, of which 66% (2,206) were approved, 28% (927) refused and 6% (203) withdrawn. In Omagh district, 2,423 outline applications were received of which 59.1% (1,432) were approved, 21.4% (518) refused and 19.5% (473) withdrawn (Appendix 2).
- 6.17** Since 2007 with the onset of economic decline, changes in the housing market and the impact of PPS 14/PPS 21, the number of outline applications has declined and now form a smaller proportion (approximately 25% compared to an average of 65% pre-2007) of the total number of applications approved for rural dwellings. It is also likely that the number of starts and completions of rural houses has declined mirroring the situation within urban housing areas and therefore more permissions may remain unimplemented.

¹ Estimate based on rural permissions (Full and Reserved Matters) and completions from a sample rural housing monitor 2003, 2005 and 2006

However, an examination of Full and Reserved Matters (RM) decisions rather than outline approvals provides a more realistic estimate of future rural house building.

- 6.18** To assist in the consideration of an appropriate level of housing allocation for the rural area and a planning policy to manage it, it is useful to compare the impact of PPS 21 to the rural planning policy of A Planning Strategy for Rural Northern Ireland (1993) by examining approval rates of Full and RM applications for single dwellings (including replacements) over the period 2004 to 2014 (Table 20). Prior to 2006-07 (when PPS 14 was introduced), single dwellings were approved at a rate of 365 per year in Fermanagh and 288 per year in Omagh. Assuming this pre-PPS 14/PPS 21 policy still remained in operation or was reapplied, some 5,475 houses could be approved in Fermanagh district over the next 15 years with a further 4,320 in Omagh. Cumulatively, this could mean that around 9,795 dwellings could be built in the countryside. This would represent 58% of the projected HGI for the new council area.

Table 20: Planning Approvals for Rural New and Replacement Single Dwellings (Full and RM) Fermanagh and Omagh 2004-2014

Year	Fermanagh			Omagh		
	Total Number of Decisions	Total Number Approved	Approval rate	Total Number of Decisions	Total Number Approved	Approval rate
2004-05	344	342	99%	269	268	100%
2005-06	386	380	98%	308	304	99%
2006-07	627	552	88%	429	396	92%
2007-08	1,075	1,045	97%	443	430	97%
2008-09	624	622	100%	426	425	100%
2009-10	571	566	99%	307	305	99%
2010-11	258	221	86%	199	185	93%
2011-12	248	238	96%	170	158	93%
2012-13	133	131	98%	99	94	95%
2013-14	70	68	97%	78	77	99%
Total	4,336	4,165	96%	2,728	2,642	97%

Source: DOE Planning Statistics.

- 6.19** In contrast, the number of approvals has steadily declined since 2010 and in the last two years (2012-2014) - when it might be said that PPS 21 had 'bedded in' - the average number approved per year in Fermanagh and Omagh has been 100 and 85 respectively. Assuming these rates remained constant over a 15-year plan period, there could be 1,500 additional dwellings in the countryside in Fermanagh and 1,275 in Omagh.
- 6.20** An alternative estimate for future rural house building can be made based on the number of farms in each district. Currently there are 2,997 farms in Fermanagh and 2,054 farms in Omagh (DARD 2013) and it may be assumed

that one additional house per farm could be built every 10 years under current PPS 21 policy. This could potentially yield more than 5,000 dwellings in the countryside over the plan period. However, it is recognised that not all farms will want or need a dwelling and a number have already utilised their 'one dwelling every 10 years'. Under current rural policy, there are also opportunities for infill houses as well as meeting housing needs based on personal and domestic circumstances.

- 6.21** It is clear that PPS 21 has had a constraining influence on rural house building in contrast to the rural policy applied under A Planning Strategy for Rural Northern Ireland. It is equally clear that a return to a more permissive rural policy would not allow the Plan to meet the objective within the RDS to grow the hubs. Taking into account permissions already granted since March 2008 coupled with an estimate of what might be approved up to 2030 if the policies of PPS 21 continued in their present form, there would appear to be sufficient to meet future rural housing needs. However, it is not known how many of the Full and RM approvals post-2010 are reflective of the high number of outline permissions granted in previous years and how many of these will actually be built. It is also assumed that building rates are lower than previous years and are more likely to constitute 'starts' rather than completions. Therefore, it may be more appropriate to consider the potential figure for the 15-year plan period based on a continuation of the policies contained in PPS 21 but with the added scope for some flexibility such as introducing Dispersed Rural Communities which would provide opportunities for small groups of houses.
- 6.22** Members therefore need to consider if the present policies in PPS 21 need adjustment in order to meet local circumstances, bearing in mind that the scope of such adjustment must take account of the RDS 2035 and the Strategic Planning Policy Statement when published in final form.

7.0 Conclusion and Key Findings

- 7.1** The purpose of this paper has been to provide base line information on the housing needs of the new Council area to assist in informing the Community Plan and to consider how future housing growth should be apportioned across settlements and the countryside. In compiling this paper, it is recognised that this evidence can be supplemented by the Community Plan process.
- 7.2** The evidence presented provides the basis for considering how housing can be best accommodated across the settlement hierarchy in line with the growth strategy presented in Paper One 'Population and Growth' and taking into account the objectives of the RDS to grow the hubs and sustain the smaller towns, villages and countryside.
- 7.3** A summary of the key findings are as follows:-

- (i) the HGI for Fermanagh-Omagh as projected for the period 2008-2030 is considered sufficient for the plan period when compared to past growth rates and population and household projections;
- (ii) housing supply across the settlement hierarchy is sufficient to meet future housing needs and in some settlements there may be potential for significant oversupply of housing;
- (iii) the need for additional zoned housing land can be addressed by zoning existing urban sites rather than an extension to settlement development limits;
- (iv) rural housing continues to make a contribution to overall housing supply albeit at a reduced rate since the introduction of PPS 21;
- (v) in considering the options for the allocation of housing across the settlement hierarchy, a more urban drive will have consequences for the sustainability of the countryside. Conversely, allowing more housing in the countryside will undermine the ability of the main towns to grow in line with the RDS. If the plan is not to fall foul of the RDS and regional policy, then a balance must be sought between these two options;
- (vi) social housing need is currently greater in Enniskillen than in Omagh;
- (vii) to address future social housing needs, the local development plan should facilitate a reasonable mix and balance of housing tenures and types;
- (viii) with an ageing population and a growing trend towards smaller household sizes, there is a need to provide smaller house types e.g. two-bedroom houses as well as specialist housing such as sheltered accommodation; and
- (ix) unfitness can be addressed through the provision of policies on the renovation and improvement of dwellings.

7.3 Members are invited to give their views on the key findings and in particular the proposed options for allocating housing across the settlement hierarchy including the implications for the countryside and the need for appropriate rural policies tailored to local needs. The paper will need to be further informed by more detailed evaluation of the individual settlements, a sustainability assessment and public consultation.