

An AI(artificial intelligence) * analysis of the transcript created at the session:
Matter 5 Issue 4 Land north of Town End Farm (Policy SP7, Site GA3)

1. Meeting details

- Purpose: Hearing session into Matter 5 Issue 4 – allocation GA3 (land north of Town End Farm) in Policy SP7 of the South Tyneside Local Plan.
- Chair: David Spencer, Planning Inspector appointed by the Secretary of State.
- Format: Structured but informal round-table discussion based on the published agenda and earlier Matters, Issues and Questions.

2. Attendees (as recorded in the transcript)

- Inspector: David Spencer.
- For South Tyneside Council:
 - Paul Shadowvain KC (for the Council).
 - Deborah Lamb, Operations Manager, Spatial Planning.
 - Rachel Cooper, Senior Planning Policy Officer.
 - Matt Clifford, Senior Planning Policy Officer.
 - Trevor Mill, Service Lead for Strategic Transport.
 - Lucy Routledge, Historic Environment Officer.
- For Helens Land Ltd (major landowner/promoter):
 - Katie Rumble, Development Director, Helens Land Ltd.
 - Chris Smith, Planning Director, Lichfields.
 - Dr Nick Bunn, Tetra Tech (transport).
 - James Street, OSology (ecology).
- For Jacobson Trust (other major landowner):
 - Richard Garland, Managing Partner, GFW, representing the Jacobson Trust.
- Local resident:
 - Peter Send(el), resident of West Boldon.

3. Overview of issues discussed

1. Site ownership, deliverability and need for policy modification.
2. Green Belt harm and compensatory improvements.
3. Heritage impacts.
4. Public transport and wider transport/connectivity.
5. Local highway impacts and junction mitigation.
6. Landscape, wildlife and biodiversity (including relationship to Boldon Hill and local wildlife sites).
7. Cross-boundary infrastructure with Sunderland (schools, health, other services).
8. Affordable housing and viability.
9. Delivery trajectory and build-out assumptions.

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4. Key statements and actions (with responsibilities)

4.1 Site ownership, deliverability and policy wording

Key statements

- The GA3 allocation is in multiple ownerships: majority land (Natress family), Jacobson Trust land (central “red” parcel), and Church Commissioners’ land (small “blue” parcel).
- Richard Garland (GFW, for Jacobson Trust) stated that:
 - The site has been promoted jointly up to 17 June, but no formal commercial terms are agreed.
 - If Jacobson land cannot be developed independently or is subject to ransom, the Trust will regard its land as **not available** and not deliverable.
- Garland argued that the current GA3 policy criteria contain no clear principles for spatial layout, comprehensive delivery, or how multiple planning applications/ownerships are to be handled, particularly if the site comes forward in phases or via separate applications.
- A statement of common ground (SoCG) between Helens Land and Jacobson Trust has been agreed, including proposed modifications at paragraph 7.2 to strengthen policy wording on:
 - Comprehensive development and phasing.
 - General conformity with the Council’s site framework document (HO2) and its indicative layout.
- Helens Land (Chris Smith) confirmed:
 - GA3 is the second largest housing allocation in the plan, and multiple ownership is not unusual.
 - Their strong preference is for a single comprehensive planning application for the whole site, as reflected in the SoCG wording.
- The Inspector noted that:
 - The Council appears to have submitted a sound plan based on joint promotion and deliverability as presented through SHLAA/call for sites, and the late emergence of ownership issues is “very concerning”.
 - He must nevertheless be “alive” to evidence that part of the allocation might not be deliverable and may need to consider whether the residual site without Jacobson land remains justified and effective.
- The Council’s current position (Paul Shadowvain KC):
 - The proposed modifications in the SoCG are **not necessary for soundness**, except that the Council is willing to accept wording requiring an **integrated, comprehensive approach** to avoid piecemeal development.
 - The Council resists tying the allocation to the non-statutory framework document (HO2), which is illustrative and may change over time; no other site is tied to it.
 - Resolving land ownership/value disputes is not the purpose of the local plan process.
- The Inspector explored a “worst-case” backstop:
 - If no acceptable modification is agreed, Jacobson Trust would withdraw its land, and he would then have to consider whether the allocation could remain sound without it.
 - He also referenced possible “other means of assembling sites as a last resort” (i.e. potential use of land assembly powers/compulsory purchase), although not in detail.

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Actions

1. **Action:** Develop revised policy wording for GA3 to require a comprehensive masterplan and phasing/implementation plan, to which all planning applications and reserved matters must conform (without tying explicitly to HO2).
 - **Responsible:** South Tyneside Council (planning policy), liaising with Helens Land and Jacobson Trust through the Programme Officer.
2. **Action:** Further refine and agree alternative wording around comprehensive delivery and inter-connectivity (including vehicular connections) drawing from, but not necessarily identical to, SoCG paragraph 7.2.
 - **Responsible:** South Tyneside Council, Helens Land, Jacobson Trust, with input from Sunderland City Council on cross-boundary highway matters.
3. **Action:** Council to discuss proposed vehicular inter-connectivity with Sunderland City Council (especially where the indicative key vehicle route enters from Sunderland's administrative area), to ensure due process and avoid later difficulties.
 - **Responsible:** South Tyneside Council, in liaison with Sunderland City Council.
4. **Action:** Inspector to set expectations and timetable (over "a few weeks") via the Council/Programme Officer for resolving the delivery/comprehensive masterplanning wording, and decide whether any outcomes are consulted on before Stage 2.
 - **Responsible:** Inspector (David Spencer) via Programme Officer and Council.
5. **Action:** Council to consider wording (via modifications) that explicitly resists piecemeal development and clarifies how multiple applications will be assessed against a site-wide masterplan.
 - **Responsible:** South Tyneside Council.

4.2 Green Belt impacts and compensatory improvements

Key statements

- The GA3 site forms part of Green Belt parcel SU1 in the Council's Green Belt Study. It performs **moderately** against purposes 1, 2 and 3, and has **low harm** against purpose 4, equating to an overall moderate harm rating.
- Appendix C of the Green Belt Study notes strong boundary features for the site and identifies a menu of potential enhancements and compensatory improvements, including improved access to Downhill Quarry.
- The Council has **deliberately not taken forward** enhanced access to Downhill Quarry in the GA3 key considerations, due to concerns that this would harm the adjacent local wildlife site.
- Chris Smith (Helens Land) confirmed they agree with the Council's Green Belt assessment and had nothing to add beyond their hearing statement.
- Resident Peter Sendel argued:
 - Multiple moderate harms should be considered cumulatively, raising the overall level of harm above "moderate".
 - The development would extend up to the A19 and create a new point where development abuts existing built-up areas (Town End Farm), undermining the Green Belt function as a "corridor" between Jarrow and the sea.
 - He referenced views from the "Asda roundabout" across the land to Boldon Hill and expressed concern that these would be significantly harmed.

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Actions

6. **Action:** Council to consider adding stronger text in GA3 key considerations to reflect Green Belt compensatory improvements and defensible boundaries, particularly landscape buffers to the north.
 - **Responsible:** South Tyneside Council (planning policy).

4.3 Heritage impacts

Key statements

- The site is close to a small group of Grade II listed buildings on Downhill Lane, notably **Downhill House**, which both Historic England and the Council's Heritage Impact Assessment consider the only asset whose significance would be affected by GA3.
- Council and Historic England agree that the allocation would cause **less than substantial harm** to Downhill House's significance, to be addressed through SP7 and the historic environment policies SP24 and Policy 43.
- Lucy Routledge confirmed:
 - The methodology for the Heritage Impact Appraisal was developed with Historic England, who agree with the conclusion that only Downhill House is affected.
- Chris Smith noted:
 - The gable of Downhill House facing the site is south-facing and has **no windows**, with primary rooms/windows on the west elevation, so its strongest setting relationship is to the west rather than toward GA3.
 - Overhead cables will effectively contain development parcels to the south, leaving a standoff between housing and the listed buildings.
- Resident Peter Sendel agreed with the Council's assessment of the heritage impact on "Schilling's House" (Downhill House) and its significance as early miners' housing.

Actions

7. **Action:** Maintain and implement heritage mitigation via SP7, SP24 and Policy 43, ensuring layout respects the setting of Downhill House and related heritage assets.
 - **Responsible:** South Tyneside Council (policy) and future applicants (masterplan and applications).

4.4 Public transport and wider connectivity

Key statements

- The Council considers GA3 **well served by public transport** and offering a "genuine choice of transport modes".
- Evidence presented:
 - Proximity to existing bus stops with regular services to Sunderland, Newcastle and various South Tyneside destinations (see Table 7 of MIQ 5.44 response).
 - Bus service 50 on Downhill Lane (not originally referenced in Table 7): half-hourly six-day service to South Shields, Washington and Durham, with hourly Sunday service.
- Dr Nick Bunn (Tetra Tech) corrected his statement to confirm service 50 is half-hourly, not hourly, and supported the Council's view that the site is well located for accessing bus services, including potential for additional bus stops on Downhill Lane.
- Trevor Mill noted:
 - Significant investment as part of the **Downhill Lane and Testo's** A19 schemes has delivered off-road bridleway connections to the wider Boldon area and a segregated bridge giving safe active travel crossing of the A19.
 - The site therefore benefits from improved walking/cycling connectivity to Washington, Gateshead, the AMP and other areas.

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- Richard Garland emphasised that logical bus and pedestrian connections must link back into Town End Farm (e.g. via Boston Street) and that earlier Tetra Tech work had not fully considered this.

Actions

8. **Action:** Ensure GA3 policy/masterplan secures strong pedestrian and bus connectivity between the site and Town End Farm (e.g. via Boston Street) and across the A19 using new infrastructure.
 - **Responsible:** South Tyneside Council transport and policy teams; Helens Land/Jacobson Trust (in masterplan).

4.5 Local highway impacts and junction mitigation

Key statements

- The site's local access and highway impacts have been assessed through the SHLAA and the Local Road Network Assessment.
- The Council's transport team raised no concerns on basic access in the SHLAA process.
- The Local Road Network Assessment identifies **three junctions** requiring mitigation but none where impacts are "severe".
- The junction at **Downhill Lane / A184** in Boldon is one of the identified junctions for mitigation.
- Trevor Mill explained:
 - The mitigation is defined at a high level, with detailed design to come at planning application stage.
 - Unlike East Boldon, this junction is currently a T-junction with no signals, so introducing traffic signals or a roundabout may be considered at application stage.
- The Inspector referenced an ongoing corridor-wide approach to A184, including potential active travel enhancements via Gordon Drive, South Lane, the Bridal Path and Dip Lane/Hilton Lane, to be refined at planning application stage.
- Resident Peter Sendel raised concerns that:
 - A Boldon bypass has been discussed since 1932, never built, and existing traffic calming has not resolved peak-time congestion.
 - Adding another major housing site will exacerbate congestion at Downhill Lane/A184 and through Boldon, and that additional junction controls (lights/roundabout) close together would worsen conditions.
- Helens Land's transport appendix (Appendix D) shows most site traffic likely routing west to Downhill Lane interchange and the A19, with **minority flows** through Boldon; they accept that GA3 should take a proportionate share of mitigation costs where necessary.

Actions

9. **Action:** Develop a detailed mitigation strategy for the Downhill Lane / A184 junction and other affected junctions at planning application stage, ensuring GA3 makes a proportionate contribution to necessary works.
 - **Responsible:** Future applicants (Helens Land / Jacobson Trust) and South Tyneside Council transport team.
10. **Action:** Explore active travel enhancements along the A184 corridor and associated routes (Gordon Drive, South Lane, Bridal Path, Dip Lane/Hilton Lane) in conjunction with GA3's design.
 - **Responsible:** South Tyneside Council transport team; future applicants.

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4.6 Landscape, wildlife and biodiversity

Key statements

- GA3 lies close to **Boldon Hill**, designated as an Area of High Landscape Value under Policy 39, and close to the **Downhill Quarry** local wildlife and geodiversity site; the site is within a wildlife corridor associated with watercourses and core sites.
- Council's mitigation approach includes:
 - A significant area of open space to the north-west of the allocation (also shown in HO2), forming a buffer to Boldon Hill and the local wildlife site.
 - Proposal (via MIQ response) to strengthen policy wording so that this open space/buffer is explicitly identified and secured in GA3.
- Resident Peter Sendel:
 - Stated that Boldon Hill's western escarpment and the views from the "Asda roundabout" are highly valued locally for their rural character and tranquillity and give a sense of being in the countryside.
 - Reported perceived decline in wildlife linked to quarry operations and later uses; he fears more housing and people will worsen wildlife and environmental conditions.
- James Street (OScology) stated for Helens Land:
 - The agricultural fields within GA3 are generally of **low habitat value**.
 - The planned north-eastern green space corridor can act both as a functional buffer and as a linkage between Downhill Quarry and **Downhill Meadows** local wildlife sites.
 - The scheme must deliver biodiversity net gain, offering opportunity to diversify habitats and enhance the local wildlife sites' value through better management and habitat creation.
 - Managed dog-walking routes (circular paths on all-weather surfaces) can be designed within the green space corridor to manage recreational pressure on sensitive wildlife areas.

Actions

11. **Action:** Draft GA3 wording to explicitly secure:
 - A northern open space buffer to Boldon Hill and the local wildlife site.
 - A north-eastern green/eco-corridor linking to Downhill Quarry and Downhill Meadows.
 - Provision of biodiversity net gain through habitat creation/management.
 - Managed recreational access and dog-walking routes.
 - **Responsible:** South Tyneside Council (policy) and future applicants (masterplan/ecology strategies).

4.7 Cross-boundary infrastructure with Sunderland

Key statements

- GA3 is immediately adjacent to Sunderland's administrative boundary and Town End Farm estate.
- A Statement of Common Ground between South Tyneside Council and Sunderland City Council identifies cross-boundary impacts and includes a proposed modification to ensure mitigation of impacts in Sunderland.
- Education:
 - Primary places are planned by Planning Area 6 ("the villages": Whitburn, Cleadon, Boldons).
 - Capacity/demand has been tested in both South Tyneside and Sunderland, with scope for demand to be met in either/both areas following parental preference.
 - For secondary, Boldon School (Planning Area 9) has capacity on the South Tyneside side.
- Health:
 - The site is less than ~100m from Town End Academy in Sunderland.
 - It lies under 1 km from Bunny Hill Surgery and 1.3 miles from Castletown Medical Centre in Sunderland.
- The Council commits to ongoing liaison with Sunderland at application stage to ensure necessary infrastructure mitigation (including Section 106) is secured, reflecting the SoCG modification.

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- Helens Land/Jacobson Trust requested additional wording in that modification (“where justified and necessary”) to mirror national policy tests and ensure contributions are only sought when required.
- The Council rejected that extra wording, stating that the legal tests for obligations already require contributions to be necessary and reasonable, so adding those words is unnecessary.
- The Inspector will consider the wording further.

Actions

12. **Action:** Implement SoCG-based modification requiring cross-boundary impact assessment and mitigation for GA3 (education, health, transport, etc.), and decide whether to add “where justified and necessary” in line with national policy tests.
 - **Responsible:** South Tyneside Council (policy drafting); Inspector to determine final wording.
13. **Action:** At application stage, coordinate between South Tyneside and Sunderland to align education and health contributions with up-to-date capacity and avoid double-counting.
 - **Responsible:** South Tyneside Council, Sunderland City Council, and future applicants.

4.8 Affordable housing and viability

Key statements

- Plan viability work (whole-plan and site-specific) by Mr New has informed the 20% affordable housing requirement.
- Site-specific viability work for GA3 assumed total policy “asks” around £95,000 per dwelling (based on 2023 information), and the site was found able to carry 20% affordable housing plus most of those costs.
- Helens Land undertook background viability work and stated they are **confident** GA3 can still deliver 20% affordable housing plus obligations, even at updated cost estimates (~£9,000 per unit for some elements).
- Helens Land is a registered provider of affordable housing (via a separate arm) and aims to meet affordable requirements where possible.
- Jacobson Trust raised no additional viability concerns beyond earlier joint representation; they confirmed no further adverse viability issues had been identified.
- The Council considers the 20% affordable housing requirement **justified and deliverable**.
- No party sought a change to the 20% requirement, and the Inspector concluded this was not a major area of dispute.

Actions

14. **Action:** Retain 20% affordable housing requirement for GA3, with viability assumptions to be refined at application stage if necessary but without policy relaxation.
 - **Responsible:** South Tyneside Council; future applicants to demonstrate scheme-level viability as required.

4.9 Delivery trajectory and build-out

Key statements

- The SHLAA and the Council’s evidence assume first completions in **2028/29**, with an average build-out of ~40 dwellings per year (slightly above SHLAA default assumptions) reflecting promoter advice.
- This implies roughly one outlet delivering 40 units per annum or two outlets delivering a similar combined rate.

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- Helens Land and Jacobson Trust agreed the trajectory and rate in the SoCG and see them as realistic, noting:
 - Potential for more than one sales outlet (including the RP arm).
 - No known “major abnormalities” or large upfront infrastructure to depress delivery.
 - Local market demand considered sufficient to support ~3+ sales per month per outlet.
- The Inspector expressed scepticism, noting:
 - Adoption likely in early–mid 2026 at best, followed by planning applications and discharge of conditions/reserved matters.
 - Additional time may be required to agree a comprehensive masterplan (especially if new policy wording is added).
 - First completions in 2028/29 might therefore be optimistic; first units in 2029/30 could be more realistic.
- Helens Land and Jacobson Trust defended the trajectory as **achievable**, particularly if a full (detailed) planning application is pursued quickly and site conditions remain straightforward.
- The Inspector discussed that moving the trajectory one year later would reduce early delivery by ~20 dwellings, which could be recovered over the plan period by slightly higher annual completions and/or higher total yield.
- Helens Land noted that the allocation’s indicative yield of 400 dwellings is conservative and that a scheme aligned with SHMA-driven mix (fewer 4-beds, more 2/3-beds) may deliver **more than 400 homes**, helping to offset any delay.
- The Council indicated that slight changes to timing (e.g. shifting 20 dwellings) can be recovered within the plan period and that GA3 does not face the kind of heavy front-loaded infrastructure that can constrain delivery on some strategic sites.

Actions

15. **Action:** Inspector to consider whether to adjust GA3’s trajectory (e.g. by one year) in the housing land supply and whether any lost early completions need compensating elsewhere or can be recovered later by GA3 itself.
 - **Responsible:** Inspector (David Spencer), in final report/trajectory.
16. **Action:** Applicants to plan early for a comprehensive masterplan and timely planning application(s) after adoption, to support the trajectory as far as practicable.
 - **Responsible:** Helens Land, Jacobson Trust and partners.

5. Topics of disagreement or conflict

1. **Policy linkage to framework document (H02)**
 - Council: Will not tie GA3 policy to the non-statutory site framework/indicative layout; only supports a requirement for an “integrated and comprehensive” approach and masterplan/phasing plan.
 - Jacobson Trust: Seeks policy wording requiring general conformity with the framework principles/layout, arguing that without it there is no robust mechanism to ensure all land (including their central parcel) remains developable and not sterilised by piecemeal applications.
 - Helens Land: Sits between these positions; supports strong comprehensive-planning wording but acknowledges Council’s concern about locking in an illustrative document.
2. **Cross-boundary infrastructure wording (“where justified and necessary”)**
 - Council: Opposes adding this phrase, on grounds that the legal tests for planning obligations already require necessity and reasonableness; considers extra wording superfluous.
 - Helens Land & Jacobson Trust: Want the wording added to better mirror national policy and ensure contributions are only sought where justified in future capacity conditions (e.g. school places).

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3. **Green Belt harm interpretation**

- Council and Helens Land: Rely on Green Belt Study: “moderate” overall harm, mitigable via strong boundaries and compensatory improvements.
- Resident: Argues multiple moderate harms should be treated cumulatively, amounting to higher overall harm; considers the allocation in the “wrong place” and damaging to the Green Belt corridor and views of Boldon Hill.

4. **Traffic impact through Boldon**

- Council/Helens Land: Evidence suggests most traffic will route to A19; impacts at junctions, including Downhill Lane/A184, are mitigable and not “severe”.
- Resident: Believes existing congestion and historic failure to deliver a Boldon bypass means additional traffic from GA3 will significantly worsen conditions.

5. **Delivery timing (first completions)**

- Council, Helens Land, Jacobson Trust: Regard 2028/29 first completions and 40 dpa build-out as realistic.
- Inspector: Indicates this may be optimistic given adoption timing and the need to secure a comprehensive masterplan; may consider shifting trajectory back one year.

6. Consolidated list of actions, risks, concerns and blockers

6.1 Key actions and responsible parties

1. Draft and agree revised GA3 policy wording for a comprehensive, integrated masterplan and phasing/implementation plan (without binding to HO2).
 - Responsible: Council (policy), Helens Land, Jacobson Trust, via Programme Officer.
2. Refine alternative wording on inter-connectivity (pedestrian, bus, vehicular) including cross-boundary links, and consult Sunderland CC as needed.
 - Responsible: Council; Sunderland City Council; promoters.
3. Decide on final cross-boundary mitigation wording, including whether to add “where justified and necessary”.
 - Responsible: Council and Inspector.
4. Strengthen GA3 key considerations on:
 - Northern landscape/wildlife buffer.
 - North-eastern green corridor.
 - Biodiversity net gain and managed access.
 - Responsible: Council (policy), applicants (masterplan/ecology)
5. Develop highway mitigation for Downhill Lane/A184 and other impacted junctions at application stage, with proportionate GA3 contributions.
 - Responsible: Council transport; applicants.
6. Coordinate education/health infrastructure with Sunderland and secure appropriate contributions (avoiding double-counting).
 - Responsible: Council, Sunderland CC, applicants.
7. Inspector to review GA3 trajectory and, if necessary, adjust timing and housing numbers; Council to update trajectory accordingly.
 - Responsible: Inspector; Council.

6.2 Risks, concerns or blockers (by theme)

Deliverability and ownership

- Risk that Jacobson Trust land will not be available if the plan does not secure a robust mechanism to ensure it is not subject to ransom or sterilised by piecemeal development.
- Potential need to re-scope GA3 or consider alternatives if Jacobson land is withdrawn, which could be highly prejudicial at this stage of examination.
- Uncertainty over whether land assembly powers may be needed in future to secure comprehensive delivery.

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Policy wording / soundness

- Disagreement about explicit reference to the site framework/indicative layout:
 - Council fears inflexibility and inconsistency with other sites.
 - Jacobson Trust sees absence of such reference as a key **blocker** to their participation and to soundness under NPPF “effective/deliverable” tests.

Green Belt and landscape

- Resident concern that cumulative moderate harms equate to a higher level of Green Belt harm and that the allocation erodes an important open corridor between settlements.
- Potential risk that insufficient policy emphasis on landscape buffers/Boldon Hill setting could weaken mitigation of visual/character impacts.

Ecology and recreation

- Existing issues with management and condition of Downhill Quarry local wildlife site; risk that increased recreational pressure (dog walking, etc.) could further degrade habitats without careful design and management.

Highways and traffic

- Long-standing congestion on A184 through Boldon, with no bypass implemented since first proposals in 1932, leads to strong local concern that new development will worsen conditions.
- Need to ensure the high-level junction mitigation strategy is translated into effective, deliverable schemes at application stage; otherwise, residual cumulative impact risk.

Cross-boundary infrastructure

- Risk of misaligned education/health capacity planning between South Tyneside and Sunderland given GA3’s proximity to Town End Farm and Sunderland facilities.
- Risk of double-counting or inappropriate obligations if policy wording is not clear enough on the national tests for developer contributions.

Timing and housing delivery

- Risk that additional time needed to agree a comprehensive masterplan and resolve ownership concerns may delay first completions beyond 2028/29.
- Potential minor impact (c.20 units) on early plan-period supply if trajectory is moved back by a year, which must be managed within the overall housing land supply strategy.

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