

Westmorland & Furness Council Infrastructure Funding Statement 2024-2025

Contents

Westmorland & Furness Council Infrastructure Funding Statement 2024-2025	1
Contents	2
1. Introduction	3
1.1 Purpose	3
1.2 Context	4
1.3 Structure	4
2. South Lakeland Locality (former South Lakeland District Council area)	6
2.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies	6
2.2 Section 106 Agreements	7
2.3 Community Infrastructure Levy (CIL)	14
3. Barrow Locality (former Barrow Borough Council area)	19
3.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies	19
3.2 Section 106 Agreements	20
4. Eden Locality (former Eden District Council area)	23
4.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies	23
4.2 Section 106 Agreements	24
5. Section 278 Agreements	32
5.1 Obligations that have been entered (agreed) into in 2024-2025	32
5.2 Money spent through planning obligations in 2024-2025	32



1. Introduction

1.1 Purpose

- 1.1.1 An Infrastructure Funding Statement (IFS) is a document that must be published at the end of each calendar year for the preceding financial year (the 'reported year') by local authorities, which receive money or in-kind works from Section 106 Agreements or issue a Community Infrastructure Levy (CIL) liability notice. This means that generally all local planning authorities need to produce an IFS, including County Councils. Such local planning authorities are also referred to as 'contribution receiving authorities'.
- 1.1.2 The requirement to publish an IFS was introduced in 2019, with the first IFSs published at the end of 2020 for the reporting year 1 April 2019 to 31 March 2020.
- 1.1.3 The IFS gives local planning authorities and communities an insight into how developer contributions are supporting new development and local infrastructure in their area. It also improves transparency in monitoring and reporting on the collection, allocation and spending of developer contributions and assists in demonstrating the local planning authority is doing this effectively and lawfully.
- 1.1.4 Section 106 Agreements (also referred to as 'planning obligations' or 'developer contributions') are legal agreements that may be entered into with a developer by a local planning authority to mitigate the impacts of the development, including on infrastructure, and to secure outcomes such as the delivery of affordable housing. They are attached to the planning permission.
- 1.1.5 A CIL is a charge (also referred to as 'developer contributions') that can be levied by local planning authorities on new development in their area and is an important tool to help deliver the infrastructure needed to support development in the local planning authority area. The levy applies in areas where a local authority has consulted on, approved, and published a charging schedule which sets its levy rates. Within Westmorland and Furness, a CIL charging schedule is in place only within the local planning authority area of the former South Lakeland District Council (outside the National Parks).
- 1.1.6 The main focus of the IFS is to provide information on what happened in respect to:
- Obligations that have been entered into in the reported year
 - Money that has been received in the reported year
 - Money that has been spent during the reported year
 - Monies that have been received in any year and retained (unspent) at the end of the reported year.
- 1.1.7 In addition, where a local planning authority has a CIL, the IFS must combine its CIL report and other information relating to the CIL within the IFS.
- 1.1.8 Though not a requirement, the IFS may also report on Section 278 agreements. These are legally binding agreements made under the Town and Country Planning Act 1990 between a Local Planning Authority and applicants for planning permission/developers.



Section 278 agreements are required to make permanent alterations or improvements to a public highway including where works are required on the highway because a planning permission has been granted. As such, when a scheme is deemed to be of benefit to the public, the highways authority can enter into an agreement with an applicant. This IFS reports on Section 278 agreements entered into and provided in the reporting year (see Section 5).

1.2 Context

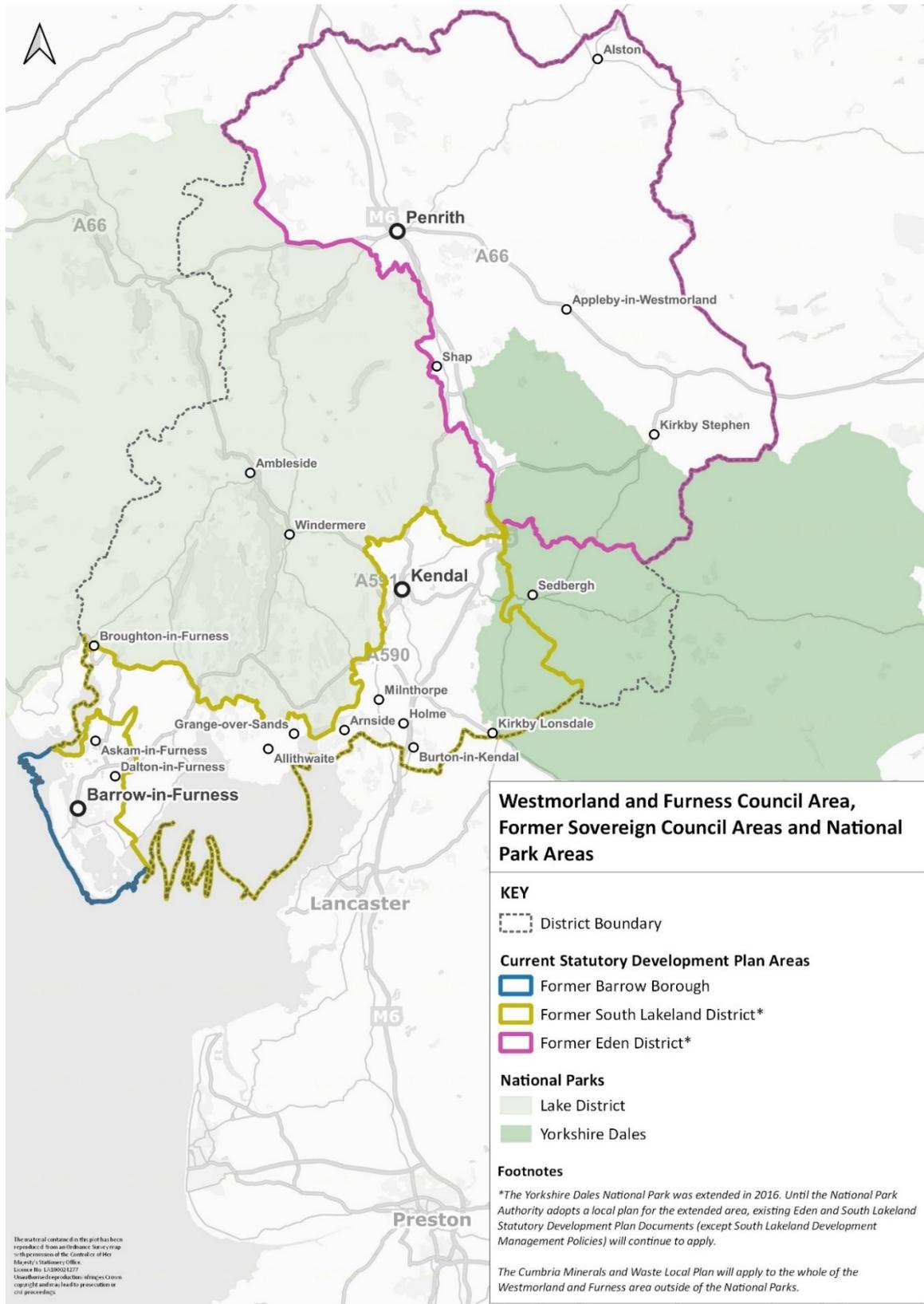
- 1.2.1 Following a statutory reorganisation process, the former sovereign Councils of Barrow Borough Council, Eden District Council, South Lakeland District Council and Cumbria County Council were abolished on 31 March 2023 and from 1 April 2023 the statutory functions of those councils were transferred to Westmorland & Furness Council for the new unitary authority area.
- 1.2.2 The newly formed Westmorland & Furness Council area also includes areas of the Lake District National Park and the Yorkshire Dales National Park. The National Park Authorities are the local planning authorities for their respective park areas and have separate responsibility for the publication of an IFS for their respective Park Authority area.
- 1.2.3 Map 1 in paragraph 1.3.1 of this IFS shows the boundaries of the new Westmorland & Furness Council area and the former sovereign Councils along with the geographic extent of the National Parks.

1.3 Structure

- 1.3.1 The IFS has been structured on the following geographic/former sovereign Council locality areas as follows and as shown on Map 1 below:
- South Lakeland (former South Lakeland District Council area excluding National Park areas¹)
 - Barrow (former Barrow Borough area)
 - Eden (former Eden District Council area excluding National Park areas¹)

¹ Except where monies are collected and to be spent by Westmorland and Furness Council





Map 1: Westmorland & Furness Council Area, Former Sovereign Council Areas and National Park Areas



2. South Lakeland Locality (former South Lakeland District Council area)

2.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies

2.1.1 The South Lakeland Local Plan 2003-2025 includes a policy (Core Strategy CS9.2) that requires new developments to secure improvements which are necessary to make the development acceptable, through planning condition or obligation (Section 106). The policy specifies a range of infrastructure types that developments might be expected to provide on-site, or off-site through Section 106 obligations, these are:

- Transport relating to highways/roads, rail, waterways, bus/other vehicular public transport, cycle, bridleway and pedestrian access and the securing of Travel Plans.
- Waste recycling and management facilities.
- Water facilities.
- Drainage and flood defence/prevention measures.
- Other utilities such as gas, electricity and telecommunications services.
- Health Care facilities.
- Education including local labour, training initiatives and childcare.
- Community facilities.
- Recreation provision (including open space, allotments, play and sport facilities).
- Biodiversity.
- Enhancement of the public realm.

2.1.2 There is no South Lakeland Local Plan Supplementary Planning Document relating to developer contributions, however, with respect to types of infrastructure such as education and highways, Section 106 contributions were and are currently considered in line with the Cumbria County Council's Planning Obligations Policy [Cumbria County Council Planning Obligations Policy](#)²

2.1.3 As outlined in section 2.3, South Lakeland District Council adopted a Community Infrastructure Levy in 2015 to be used to also help fund provision and enhancement of infrastructure. The CIL Infrastructure Funding List included in section 2.3.28, specifies which types of infrastructure should be funded by CIL (either fully or in part).

2.1.4 Core Strategy Policy CS6.3 specifies requirements for affordable housing from new development. The policy specifies on schemes of nine or more dwellings in the Principle and Key Service Centres (Kendal, Ulverston, Grange-over-Sands, Milnthorpe and Kirkby Lonsdale), and three or more dwellings outside of these areas, no less than 35% of the total number of dwellings proposed should be affordable.

² <https://cumbria.gov.uk/elibrary/Content/Internet/538/755/1599/41590142248.PDF>



In the Arnside and Silverdale National Landscape, policy AS03 of the Arnside and Silverdale AONB Development Plan Document specifies a requirement for 50% affordable housing on schemes of 2 or more dwellings. Section 106 agreements are used to secure affordable housing either through on-site provision in most cases or off-site through a commuted sum.

- 2.1.5 The South Lakeland Infrastructure Delivery Plan 2017 sets out the strategic infrastructure requirements to support the delivery of the current South Lakeland Local Plan. Most Section 106 agreements relate to site-specific infrastructure requirements arising from development impacts within the immediate local area. The most common types of infrastructure, which Section 106 agreements are used to secure improvements to, or provision of, include open space / play space, sustainable transport e.g. footpaths, highways improvements, school transport, school places, and open space maintenance. Work has started on a new IDP for Westmorland and Furness (excluding the parts of the District that are within the two National Parks).

2.2 Section 106 Agreements

Obligations that have been entered (agreed) into in 2024-25

- 2.2.1 Three obligations have been entered into in 2024-25 with monies attached. Two obligations relate to a biodiversity impact contribution if applicable in connection with the replacement of an aqueduct at Land from East of Town House, Old Hutton to Land East of Bleabeck Plantation and immediately West of Old Scotch Road, Old Hutton and Land South of A685 Appleby Road, Kendal to Land immediately north of A684 off Kiln Road, Kendal (Dowker Section).
- 2.2.2 A further obligation is for monies for biodiversity net gain at the Cumbria Wildlife Trust Foulshaw Moss Nature Reserve in connection with an outline planning application for 8 dwellings on the housing allocation North of Briery Bank in Arnside.
- 2.2.3 There were also obligations relating to Land off Beetham Road, Milnthorpe, Land off Oakfield Park, Kirkby Lonsdale, Land to the south of Hags Lane, Cartmel and at Yewbarrow Lodge, Grange-over-Sands for the provision of affordable homes on-site. These are considered separately under “Non-monetary contributions”. In addition an obligation has been signed in respect to planning permission at South of Wray Cottage, Docker, Kendal for the monitoring and management of a package treatment plant in association with nutrient neutrality off-setting impacts.

Planning Application	Item	Amount (£)
SL/2021/0630 Land from East of Town House, Old Hutton to Land East of Bleabeck Plantation and immediately west of Old Scotch Road, Old Hutton. Replacement of aqueduct.	Biodiversity impact, if applicable	15,000.00
SL/2021/0686 From Land to the south of the A685, Appleby Road, Kendal to land immediately north of the A684 off Kinn Road, Kendal. Replacement of aqueduct.	Biodiversity impact, if applicable	15,000.00
SL/2022/0062 Land north of Briery Bank, Arnside, Carnforth. Outline planning application for the erection of 8 dwellings.	Biodiversity net gain contribution at Cumbria Wildlife Trust Foulshaw Moss Nature Reserve	3,000.00
TOTAL		33,000.00



Money received through planning obligations received in 2024-25

- 2.2.4 Money was received from planning permission for housing development at Gascow Farm, Priory Road, Ulverston. The contributions received are to fund the completed Cross-a-Moor roundabout at Swarthmoor. The roundabout was funded from several sources and delivered by National Highways a few years ago. However, as part of the funding agreements, contributions at the development at Gascow Farm were agreed upon to cover some of the funding secured through the Cumbria Infrastructure Fund (CIF) to enable the project. The CIF was a Local Enterprise Partnership repayment fund also used to deliver the Cross-a-Moor scheme. This money is therefore not available to spend.
- 2.2.5 Money has been received from planning permission at Land at Brigsteer Road, Kendal (Phase 3) for off-site open space provision – improvement of recreation and play provision, this will be delivered on the remaining part of the Stainbank Green allocation site in association with phase 4 planning application. Money from the same permission has also been received to establish and future maintain species rich pasture on land next to Foulshaw Moss Nature Reserve. This money has been transferred to Cumbria Wildlife Trust for spending.

Planning Application	Item	Amount (£)
SL/2016/0602 Gascow Farm, Priory Road, Ulverston. Erection of 235 dwellings.	Contribution to Cross-a-Moor roundabout, Swarthmoor (to fund the completed roundabout on the A590)	131,079.58
SL/2022/0921 Land off Brigsteer Road, Kendal (Phase 3). Erection of 24 dwellings.	Off-site public open space contribution with the Stainbank Green allocation or the provision for the improvement of open space and recreation/play provision within the Vicarage Road green wedge if the remainder of the remainder of the Stainbank Green allocation is not substantially complete by the end of 2030 (monies to be spent on on-site provision within Stainbank Green allocation)	12,179.00
SL/2022/0921 Land off Brigsteer Road, Kendal (Phase 3). Erection of 24 dwellings.	Biodiversity contribution to establishment and future maintenance of 2.4 hectares species rich pasture on former agricultural land adjoining Foulshaw Moss Nature Reserve (monies transferred to Cumbria Wildlife Trust for spending)	50,715.00
TOTAL		193,973.58

Money spent through planning obligations in 2024-25

- 2.2.5 As reported above, monies from Gascow Farm, Priory Road, Ulverston were spent to recover costs towards the roundabout on the A590 at Cross-a-Moor.
- 2.2.6 Monies were also spent on extra pupil places at St Patrick's Church of England School, Endmoor, utilising money received from the Land North of Sycamore Close, Endmoor planning permission. The monies were used to fund an extension to the school providing more space and improved facilities for pupils including new toilets, a cloakroom area, storage facilities and a multi-use 62 square-metre classroom.





Figure 1: Key stakeholders for the project were invited to the ribbon cutting event, which was performed by the Mayor of Kendal, Councillor Jonathan Cornthwaite

2.2.7 The table below shows all Section 106 monies spent in 2024-25.

Planning Application	Item	Amount (£)
SL/2016/0602 Gascow Farm, Priory Road, Ulverston. Erection of 235 dwellings.	Contribution to Cross-a-Moor roundabout, Swarthmoor (to fund the completed roundabout on the A590)	131,079.58
SL/2017/0841 Land north of Sycamore Close, Endmoor. Erection of 106 dwellings.	Extra pupil places at St Patrick's Church of England School, Endmoor	314,573.08 (2 contributions comprising of 146,689.89 and 167,883.19)
TOTAL		445,652.66

Monies received through planning obligations received and retained (unspent) as at end of 2024-25

2.2.8 The table below indicates the moneys held from Section 106 obligations unspent as at the end of March 2025. In some cases monies have been spent, but cannot be reported as such until monies have been transferred into the relevant budget code, where the case this is included below.

Planning Application	Item	Amount (£)
SL/2013/0830 Land to the south of Natland Millbeck Lane, Kendal. Erection of 76 dwellings.	Off-site affordable housing provision (through commuted sums)	56,180.53
SL/2013/0169 Barns at Thompson Fold, Lupton. Change of use of partially completed holiday accommodation to 4 dwellings.	Off-site affordable housing provision (through commuted sums)	48,474.58
SL/2016/1109 Sir John Barrow Way, Lund Farm, Ulverston. Erection of 106 dwellings.	Off-site affordable housing provision (through commuted sums)	322,789.37
SL/2021/0245 Riverside Place, Lound Road, Kendal. Creation of 3 additional residential apartments.	Off-site affordable housing provision (through commuted sums)	44,173.00



Planning Application	Item	Amount (£)
SL/2010/1015 Auction Mart, Appleby Road, Kendal. Erection of 94 dwellings.	Open Space Maintenance at The Kendal Auction Mart housing development, Kendal (through commuted sum)	9,499.63 (some monies spent in 2022-23, 2023-24 and 2024-25 but not transferred into relevant budget as at end of March 2025)
SL/2007/1354 NE Sandylands Road, Kendal. Erection of 94 dwellings.	Landscape maintenance at NE Sandylands Road, Kendal (through commuted sum)	32,400.00 (some monies spent in 2022-23, 2023-24 and 2024-25 but not transferred into relevant budget as at end of March 2025)
SL/2003/2098, SL/2003/1755 and SL/2007/1100 Phase 4A, 4B and 5 Pear Tree Park, Holme. Erection of 23 dwellings. 13 to be affordable.	Maintenance of on-site open space/play space at Pear Tree Park (through commuted sum)	10,861.00 (some monies spent in 2022-23, 2023-24 and 2024-25 but not transferred into relevant budget as at end of March 2025)
SL/2019/0880 Land at West End Nurseries, West End Lane, Ulverston. Erection of 92 dwellings.	Open Space / play area at Lightburn Park play area, Ulverston	6,487.78
SL/2016/1109 Sir John Barrow Way, Lund Farm, Ulverston. Erection of 106 dwellings.	Off-site play area at Lund Farm, Ulverston	33,079.87
SL/2014/0506 Land adjacent to Vicarage Drive, Kendal. Erection of 15 dwellings.	Open space improvements in the vicinity of the area (to be spent on Brockbeck play area, Kendal)	910.81 (monies spent in 2023-24 but not transferred into relevant budget as at end of March 2025)
SL/2013/0181 Former Gallowbarrow Mill Site, Natland Road, Kendal. Erection of 148 dwellings.	Maintain, improve or provide play facilities within the vicinity of the site	5,800.00
SL/2012/0566 Land off Oxenholme Road, Kendal. Erection of 148 dwellings.	Off-site play area either Whinlatter Drive Park and / or Hayclose Road Park and play space within the vicinity of the site	5,185.04
SL/2010/1094 Greengate House & Gardens, Levens. Conversion and extension of Greengate House into 2 dwellings, and erection of 5 dwellings.	Off-site play space improvements, Levens	1,500.00
SL/2014/0835 Pitt Farm, Hags Lane, Cartmel. Erection of 11 dwellings.	Play Space Contribution – used by Council to improve or provide play facilities in the local area	3,360.00
SL/2014/0835 Pitt Farm, Hags Lane, Cartmel. Erection of 11 dwellings.	Highways works associated with the improving of pedestrian provisions on Hags Lane, Cartmel	5,410.00
SL/2016/0504 Church Bank, Burton-in-Kendal. Erection of 29 dwellings.	Off-site play area improvements, Burton-in-Kendal	8,484.14



Planning Application	Item	Amount (£)
SL/2014/1036 Land to the south of Thornfield Road, Grange-over-Sands. Erection of 64 dwellings.	Open Space – Off-site play area contribution to maintain, improve or provide play facilities in the locality	12,305.13 (monies spent in 2023-24 but not transferred into relevant budget as at end of March 2025)
SL/2014/1036 Land to the south of Thornfield Road, Grange-over-Sands. Erection of 64 dwellings.	Administration of the secondary school transport to and from the development	813.15
SL/2014/1036 Land to the south of Thornfield Road, Grange-over-Sands. Erection of 64 dwellings.	Provision of additional secondary school transport to and from the development to Cartmel Priory School	37,421.19
SL/2020/0783 Land off Brigsteer Road, Kendal (Phase 2). Erection of 88 dwellings.	Biodiversity Impact Contribution (towards off-site compensation for loss of biodiversity). Monies to be transferred to Cumbria Wildlife Trust for spending once received	20,800.00
SL/2020/0783 Land off Brigsteer Road, Kendal (Phase 2). Erection of 88 dwellings.	Public right of way improvements and upgrading of surface footpath	11,000.00
SL/2020/0783 Land off Brigsteer Road, Kendal (Phase 2). Erection of 88 dwellings.	Off Site public open space contribution within the Stainbank Green allocation or the provision for the improvement of open space and recreation / play provision within the Vicarage Road green wedge if the remainder of the remainder of the Stainbank Green allocation is not substantially complete by the end of 2030. (monies to be spent on on-site open space provision within Stainbank Green housing allocation)	51,577.90
SL/2022/0921 Land off Brigsteer Road, Kendal (Phase 3). Erection of 24 dwellings.	Off-site public open space contribution within the Stainbank Green allocation or the provision for the improvement of open space and recreation/play provision within the Vicarage Road green wedge if the remainder of the remainder of the Stainbank Green allocation is not substantially complete by the end of 2030 (monies to be spent on on-site provision within Stainbank Green allocation)	12,170.00
SL/2022/0921 Land off Brigsteer Road, Kendal (Phase 3). Erection of 24 dwellings.	Biodiversity contribution to establishment and future maintenance of 2.4 hectares species rich pasture on former agricultural land adjoining Foulshaw Moss Nature Reserve (monies transferred to Cumbria Wildlife Trust for spending)	50,715.00
SL/2020/0783 Land off Brigsteer Road, Kendal (Phase 2). Erection of 88 dwellings.	Travel Plan monitoring	6,600.00



Planning Application	Item	Amount (£)
SL/2019/0146 Land at Booths, Oubas Hill, McDonald's, Ulverston. Erection of freestanding single storey restaurant with associated drive-thru (McDonald's).	Litter bin installation at McDonald's, Ulverston	3,164.71 (monies spent in 2022-23 but not transferred to relevant budget as at end of March 2025)
SL/2019/0146 Land at Booths, Oubas Hill, McDonald's, Ulverston. Erection of freestanding single storey restaurant with associated drive-thru (McDonald's).	Maintenance sums for litter bins at McDonald's, Ulverston	18,879.49 (monies spent in 2023-24 but not transferred to relevant budget as at end of March 2025)
SL/2018/0897 Land south of Allithwaite Road, Kents Bank, Grange-over-Sands (Phase 1). Erection of 87 dwellings.	Traffic regulation order contribution in relation to Allithwaite Road, Kents Bank, Grange-over-Sands	7,061.01
SL/2019/0758 Former Age Concern UK, Lindale Road, Grange-over-Sands. Erection of convenience store and petrol filling station.	Footbridge linking the site to public car park	20,000.00
SL/2013/0594 Greenside Farm, off Viver Lane, Hincaster, Milnthorpe. Erection of 18 dwellings.	Transport to schools for school age children residing in the dwellings	42,032.65
SL/2013/1120 Kendal Rugby Union Football Club, Shap Road, Kendal. Erection of supermarket (Sainsbury's).	Highways – to increase the frequency of buses from Kendal town centre past the development site	130,198.00
SL/2013/1120 Kendal Rugby Union Football Club, Shap Road, Kendal. Erection of supermarket (Sainsbury's).	Travel Plan administration	4,592.52
SL/2014/0822 Land to the east of Greengate Crescent, Levens. Erection of 49-50 dwellings.	Education – additional capacity for transport to Dallam School for secondary school age children	64,629.38
SL/2017/0620 Land south of Fell Close, off Burton Road, Oxenholme, Kendal. Erection of extra care residential development (80 apartments and 24 bungalows).	Highways works to pedestrian refuge in A65 and associated works	13,683.75
SL/2017/0841 Land north of Sycamore Close, Endmoor. Erection of 106 dwellings.	Provision of transport for children who live on the development to the Queen Elizabeth School, Kirkby Lonsdale or such suitable alternative	88,674.87
SL/2014/0846 Land to the south of Lumley Road, Kendal. Erection of 110 dwellings (reserved matters 16/0519).	Highways – improving the junction between Milnthorpe Road and Romney Road, Kendal	45,292.98
SL/2014/0846 Land to the south of Lumley Road, Kendal. Erection of 110 dwellings (reserved matters 16/0519).	Education – school improvement for additional accommodation at Vicarage Park CoE School to be used towards the cost of providing these necessary additional places	335,825.22



Planning Application	Item	Amount (£)
SL/2019/0602 Land north of Laurel Gardens, Kendal. Erection of 157 dwellings.	Travel Plan monitoring	6,600.00
SL/2017/0883 Lakeland leisure Park, Moor Lane, Flookburgh. Installation of 85 hardstanding bases (for 85 static caravans).	Footway improvements along Moor Lane between Leisure Park and playground	30,000.00
TOTAL		1,608,632.70

Non-monetary contributions

Affordable Housing Delivery – On-site delivery 2024-25

2.2.9 The table below indicates the number of affordable homes including type delivered on-site through Section 106 obligations in 2024-25.

Planning Application	Affordable Homes delivered
SL/2016/0602 Gascow Farm, Ulverston	3 discounted sale units 6 affordable rent units
SL/2016/1109 Sir John Barrow Way, Lund Farm, Ulverston	2 affordable rent units 2 shared ownership
SL/2017/0841 Land north of Sycamore Close, Endmoor	1 affordable rent unit
SL/2022/0718 Land off Underbarrow Road, East B, Kendal	2 shared ownership units
SL/2019/0602 Land north of Laurel Gardens, Kendal	4 shared ownership 2 affordable rent unit
SL/2018/0011 West of Oxenholme Road, Phases 3 + 4, Kendal	2 shared ownership units 1 affordable rent unit
SL/2018/0364 Land adjacent to Burlington Church of England School, Kirkby-in-Furness	3 affordable rent units
SL/2020/0783 Stainbank Green Phase 1 (Land off Brigsteer Road site), Kendal	2 shared ownership units 4 discounted sale units 4 affordable rent units
SL/2021/0383 West of Sedgwick Road, Natland	5 affordable rent units 2 shared ownership units 3 discounted sale units

On – Site Affordable Housing – Planning Obligations entered into 2024-25

2.2.10 Four planning permissions were granted in 2024-25 with planning obligations attached to them for the delivery of 45 affordable housing units in total on site as identified below:

- SL/2022/0305 Land off Beetham Road, Milnthorpe – 8 affordable rent, 5 shared ownership, 6 first homes (19 in total, out of 125 units).
- SL/2022/0335 Land off Oakfield Park, Kirkby Lonsdale, 6 affordable rent, 3 shared ownership and 3 first homes (12 in total out of 34 units).
- SL/2022/0055 Land south of Haggs Lane, Cartmel, 6 affordable rent, 8 low cost homes (14 in total out of 39 units).
- SL/2023/0647 Land at Yewbarrow Lodge, Main Street, Grange-over-Sands, 18 affordable units comprising 7 shared ownership houses, 2 affordable rent houses and 9 affordable rent apartments.



2.3 Community Infrastructure Levy (CIL)

Introduction

- 2.3.1 CIL was introduced nationally in 2010 and has been charged in the legacy South Lakeland planning authority area of Westmorland and Furness (outside of the National Parks) since June 2015. CIL is a set charge, based on the gross internal area floorspace of buildings, on new residential and supermarket development to help fund the infrastructure needed to address the cumulative impact of planned development in the South Lakeland Local Plan. The CIL charging schedule, setting out CIL charging rates, is available on the Westmorland & Furness Council [website](#)³. The current rate from 1 January 2025 is £76.37/m² for residential development and £229.10/m² for supermarkets and retail warehouses.
- 2.3.2 Local Planning authorities must use CIL to fund ‘the provision, improvement, replacement, operation or maintenance of infrastructure to support the development of the area’. There is also a neighbourhood portion of CIL - ‘Local CIL’ - which is similarly available to fund infrastructure but can also fund ‘*anything else that is concerned with addressing the demands that development places on an area*’. Under ‘Local CIL’, a CIL charging authority must pass 15% of local CIL receipts to the Parish or Town council for the area where a CIL-liable development takes place, rising to 25% if the parish has a Neighbourhood Plan in place. The Heversham and Hincaster Neighbourhood Plan was adopted in February 2017 and the Grange over Sands Neighbourhood Plan was adopted in July 2018. The Allithwaite and Carmel Neighbourhood Plan was adopted in April 2024. In unparished areas, Westmorland and Furness Council as the CIL charging authority can spend equivalent amounts in the locality, following engagement with local communities. While all of South Lakeland is parished, these arrangements for unparished areas apply in those parishes which have Parish Meetings rather than Town or Parish Councils. Parish Meetings are not able to receive and spend ‘Local CIL’. A CIL Advice Note for Parish and Town Councils on CIL is available on the Westmorland and Furness [website](#)⁴.
- 2.3.3 CIL continues to be levied and available to assist with the infrastructure costs of planned development in the area covered by the South Lakeland Local Plan.

Demand notices invoiced and received

- 2.3.4 There is a CIL instalments policy, which is set out on the Westmorland & Furness Council [website](#)⁵. This allows for CIL to be paid in up to 8 instalments over several years, depending on the size of the housing sites.
- 2.3.5 The CIL Demand Notice however, sets out the whole sum payable and the instalments required; therefore, CIL Demand Notices issued during a particular year do not necessarily equate to the CIL sums likely to be received during that year, and can take several years to be paid. In addition, developments can be altered through further planning permissions over time, often resulting in revised Demand Notices needing to be issued. Any such re-issued Notices are not double counted in this report; if a Demand Notice is issued and then re-issued in the same reporting year, only the re-issued Notice would be included within the figure for CIL invoiced during the year.

³ <https://www.southlakeland.gov.uk/planning-and-building/planning/community-infrastructure-levy-cil-for-planning-applications/community-infrastructure-levy-cil-charges-exemptions-penalties-and-appeals/>

⁴ https://www.southlakeland.gov.uk/media/8472/parish-and-town-council-advice-note-v5_update_oct-2023-finaldocx-1.pdf

⁵ <https://www.southlakeland.gov.uk/planning-and-building/planning/community-infrastructure-levy-cil-for-planning-applications/community-infrastructure-levy-cil-policies-in-south-lakeland/>



Headline Figures

Item	Amount (£)
CIL invoiced (as set out in Demand Notices) ⁶ in 2024-25	618,504.68
CIL receipts ⁷ received in 2024-25	1,458,609.36
CIL receipts that CIL regs 59E and 59F apply to ⁸ (funds recovered from Parish or Town Councils or received and retained for Parish Meetings in 2024-25.)	-
CIL expenditure ⁹ in 2024-25 (as passed to Parish and Town Councils, (£266,230.44); and CIL Admin, (£72,930.47)	339,160.91
CIL retained ¹⁰ at end of 2024-25 (from all CIL income prior to April 2025 - as retained for Strategic CIL; CIL Admin, and areas with Parish Meetings -for Mansergh Parish)	7,249.702.03

2.3.6 In 2024-25 no CIL was spent repaying money borrowed for strategic infrastructure projects. £72,930.47 was retained for **CIL administration**, representing 5% of the total CIL received in 2024-25.

Parish and Town Councils – Neighbourhood CIL

2.3.7 Westmorland & Furness Council passed a proportion of CIL (Neighbourhood or Local CIL) to Parish and Town Councils under CIL regulations 59A and 59B in 2024-25, as set out in the following table:

Parish/Town Councils	CIL Paid (£)
Aldingham	924.02
Arnsdale	156.01
Beetham	1,847.11
Burneside	1,222.77
Grange over Sands	12,696.49
Kendal	144,956.47
Kirkby Ireleth	9,726.79
Kirkby Lonsdale	13,639.53
Levens	2,062.03
Lower Holker	900.00
Natland	7,173.45
Preston Patrick	1,868.96
Preston Richard	18,511.38
Stainton	1,153.37
Ulverston	48,689.64

⁶ Includes late payment or other surcharges, and interest, included in Demand Notices

⁷ Total CIL receipts during reported year which includes any land and infrastructure “payments” received as “In-Kind” CIL payments; any CIL receipts subsequently set aside for CIL administration and ‘Local CIL’ purposes; any CIL surcharges/interest received, and CIL received for any other reason.

⁸ The total amount of CIL that was relevant to CIL regulation 59E (CIL previously paid to a Parish or Town council under CIL Regulation 59A or 59B which has subsequently been recovered from that Parish or Town Council) and CIL regulation 59F (a proportion of CIL set aside to be spent in parishes with Parish Meetings which are unable to receive or spend CIL).

⁹ Actual CIL expenditure during the reported year, regardless of when received, including ‘Local CIL’ allocations both where spent by the charging authority under CIL regulation 59E and 59F, and where passed to parish/town councils under regulation 59A or 59B, whether subsequently spent or not by that council. Also includes CIL passed to external organisations under regulation 59(4) whether subsequently spent or not; CIL spent on administration of CIL; CIL “expenditure” in regard to any land and infrastructure payment received as “In-Kind” CIL payments from the point any development on the land is commenced or completed, and CIL refunded due to overpayments.

¹⁰ Total CIL retained, whenever received and including CIL retained to which regulation 59E and 59F applied.



Parish/Town Councils	CIL Paid (£)
Urswick	702.42
TOTAL	266,230.44

2.3.8 In 2024-25 no CIL was passed to external organisations (other than parish/town councils) under CIL regulation 59(4).

2.3.9 In 2024-25 under Regulation 59E¹¹, Westmorland & Furness Council did not recover any CIL previously paid to a parish or town council. In the same year, under Regulation 59F, Westmorland & Furness Council set aside no additional funds to be spent in areas with Parish Meetings (which are unable to receive or spend CIL).

CIL Receipts retained (allocated¹² and unallocated)

2.3.10 No CIL receipts, received prior to 2024-25, had been allocated (to an infrastructure project or item), but not spent, by the end of 2024-25.

2.3.11 The total amount of CIL receipts, whenever collected including 2024-25 which were allocated (whether allocated prior to or during 2024-25) but not spent during 2024-25 were £0. The following amounts were allocated in the year 2022-23:

- £80,000 was allocated to the Canal and River Trust to assist with towpath improvements between Crooklands and Stainton.
- £75,000 was allocated to Cumbria County Council as a contribution towards the cost of the new Gooseholme Bridge over the river Kent in Kendal.
- £300,000 contribution allocated towards the cost of major repairs and improvements to the Grange Lido and promenade.

CIL Receipts retained (regulation 59E and 59F)

2.3.12 No notices were served in accordance with regulation 59E¹³ (to recover CIL previously passed to a parish or town council).

2.3.13 CIL receipts received in 2024-25 retained at the end of 2024-25 (other than those to which CIL regulation 59E and 59F applied): £1,458,609.36, including strategic CIL and CIL Admin.

2.3.14 CIL receipts received before 2024-25 retained at the end of 2024-25 including strategic CIL and CIL admin (other than those to which CIL regulation 59E and 59F applied): £5,710,542.32.

2.3.15 No CIL receipts received were retained at the end of 2024-25 to which CIL regulation 59E or 59F applied.

2.3.16 CIL receipts received prior to 2024-25 to which CIL regulation 59E or 59F applied, retained at the end of 2024-25: £720.00 ('neighbourhood' CIL relating to Mansergh Parish).

¹¹ Reporting authorities should be clear in this section when infrastructure provision (or provision of "anything else that is concerned with addressing the demands that development places on an area") was undertaken in respect of regulation 59E and 59F. Parish/Town councils are separately required to report on CIL sums received through regulation 59A and 59B.

¹² 'Allocated' means CIL sums retained by the reporting authority which have, or knowingly will be, passed to an internal team to fund a specific infrastructure project or infrastructure type. 'Allocated' also includes sums which will knowingly be passed to an external organisation but which are yet to be passed.

¹³ Reporting authorities are not necessarily required to name any parish/town council to which this regulation applies.



CIL Infrastructure Expenditure¹⁴ in 2024-25

2.3.17 During 2024-25, no CIL was expended.

2.3.18 Significant elements of strategic infrastructure essential for the delivery of planned growth in the South Lakeland Local Plan were funded and delivered from a variety of other sources in earlier years. Examples include:

- £3.4m for highways and transport improvements in Kendal, including road junction improvements and improved cycle routes, funded by Cumbria Local Enterprise Partnership.
- £4.5m for improvements to the A590 in Ulverston funded by the Cumbria Local Enterprise Partnership, including a new road access to the Local Plan employment allocation at Lightburn Road, part of which has been developed for a 'Blue Light' hub.

2.3.19 In September 2022 work was completed on the £10.5m roundabout on the A590 at Swarthmoor to serve sites allocated in the Local Plan for about 1200 homes in Swarthmoor and south Ulverston. Sources of funding for the project include Highways England, Cumbria Local Enterprise Partnership, developer contributions and SLDC. No CIL funding was required.

2.3.20 In the year 2022-23, SLDC committed £80,000 towards a £300,000 improvement scheme to improve the Lancaster Canal Towpath Trail between Crooklands and Stainton. It also committed £75,000 of CIL to help fund the Gooseholme Bridge in Kendal and contributed £300,000 towards major repairs and improvements to the Grange Lido and Promenade.

2.3.21 SLDC was superseded by the new unitary Westmorland & Furness Council from 1 April 2023. However, CIL continues to be levied and available to assist with the infrastructure costs of planned development in the area covered by the South Lakeland Local Plan.

CIL Infrastructure List

2.3.23 Regulation 121A(1)(a) requires the infrastructure funding statement to include:

“a statement of the infrastructure projects or types of infrastructure which the charging authority intends will be, or may be, wholly or partly funded by CIL (other than CIL to which regulation 59E or 59F applies) (“the infrastructure list”)”

2.3.24 SLDC published priorities for spending CIL in the [Infrastructure delivery Plan](#)¹⁵ (IDP), and its [Executive Summary](#)¹⁶ (August 2017) for the types of infrastructure required to support the delivery of the current [South Lakeland Local Plan](#)¹⁷ (2003-2025). Westmorland & Furness Council has now commenced preparation of a Local Plan for the new district, which will replace the South Lakeland, Barrow and Eden Local Plans. This will include an assessment of the infrastructure needs arising from planned development in the new plan and the case for a review of CIL and its possible extension to all of the Westmorland & Furness planning authority area.

2.3.25 The types of infrastructure projects that CIL should be wholly or partly spent on in the former South Lakeland planning authority area listed below, are based on evidence underpinning the former SLDC's published Infrastructure Delivery Plan, ongoing dialogue with service providers including for example the NHS and current priorities. This list replaces the CIL Regulation 123 Lists under the CIL Amendment England Regulations 2019 that came into effect 1 September 2019.

¹⁴ 'Infrastructure expenditure' mainly relates to CIL spent by the reporting authority but this section can include details of infrastructure provision undertaken by an external organisation who has been passed CIL funds by the reporting authority under regulation 59(4). The reporting authority should clearly specify in this section any infrastructure provision relevant to regulation 59(4).

¹⁵ <https://www.southlakeland.gov.uk/media/4287/infrastructure-delivery-plan-august-2017.pdf>

¹⁶ <https://www.southlakeland.gov.uk/media/4288/idp-executive-summary-august-2017.pdf>

¹⁷ <https://www.southlakeland.gov.uk/planning-and-building/local-plan/south-lakeland-local-plan/>



Projects which are critical or essential to support the delivery of the South Lakeland Local Plan:

- Transport and Air Quality Improvement Measures in Kendal Town Centre and surrounding area to support new development.
- A590 Ulverston Access Improvements to support delivery of housing and employment development sites, including the Swarthmoor Roundabout.
- Access to employment sites including Scroggs Wood, Kendal; East of Burton Road, Kendal; the Mainline site, Milnthorpe; Land North of Meadowbank Business Park, Kendal, and the mixed-use regeneration and employment opportunity sites at Ulverston Canal Head.
- School place provision where needed to accommodate development at Kendal and Ulverston's primary and secondary schools, and Cartmel Priory Secondary School.

Schemes which are important but not considered critical or essential to the delivery of the South Lakeland Local Plan:

- Highway and Transport Schemes including sustainable transport with strategic benefits not directly related to development, including those arising from the Kendal Town Centre Strategy and Kendal Local Cycling and Walking Plan and emerging local cycling and walking plan for Ulverston.
- Community Facilities Improvements not directly related to a development.
- Strategic green infrastructure not directly related to a development such as the Lancaster Canal Multi-functional trail.
- Cultural and leisure facilities which are not directly related to a development.
- Open Space Improvements to strategic publicly accessible areas at Lightburn Park Ulverston; Abbot Hall Park, Kendal Castle Hill and Nobles Rest in Kendal; and the Promenade, Park Road Gardens and Ornamental Gardens Grange-over-Sands.
- Kendal and Ulverston Canal Head area regeneration, public realm, heritage and environment projects across district not directly related to a development.
- Health Care facilities.
- Kendal Parkside Cemetery extension, Arnside Cemetery additional space, Grange Fell Cemetery and Ulverston Cemetery.
- Sustainable transport improvements in Ulverston.
- Infrastructure that may support the regeneration/redevelopment of existing employment sites and other sites that would support the strategic objectives of the Local Plan.



3. Barrow Locality (former Barrow Borough Council area)

3.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies

3.1.1 Policy I1 of the Barrow Borough Local Plan 2016-2031 sets out the type of contributions a developer may be expected to make to assist in mitigating the effect of the proposed development in the existing community. The policy states that the types of infrastructure that developments may be required to provide contributions towards include, but are not limited to:

- Utilities and waste.
- Flood prevention and sustainable drainage measures.
- Transport (highway, rail, bus and cycle / footpath network and any associated facilities).
- Community Infrastructure including health, education, libraries, public realm, heritage and geological assets and other community facilities.
- Green Infrastructure (such as outdoor sports facilities, open space, parks, allotments, play areas, enhancing and conserving biodiversity and management of environmentally sensitive areas).
- Climate change and energy initiatives through allowable solutions.

3.1.2 The requirement for affordable housing delivery is set out in Policy H14 of the Local Plan. In line with the National Planning Policy Framework (NPPF), this policy expects that 10% of dwellings on sites of ten units or over should be affordable. Alternatively, contributions to the provision of affordable housing off-site will be considered where justified. The requirement for affordable housing was first introduced in the former Borough in 2018, when the requirement was included in the updated NPPF. It was subsequently included in Policy H14 of the Barrow Local Plan, which was adopted in 2019. It is therefore a relatively recent requirement in the Barrow area.

3.1.3 The Affordable Housing and Developer Contributions Supplementary Planning Document was adopted in July 2022. This sets out the former Barrow Borough Council's approach to the delivery of affordable housing and the approach to seeking financial contributions from developers for a variety of infrastructure and services. Section 106 contributions were and are currently considered also in line with the Cumbria County Council's Planning Obligations Policy [Cumbria County Council Planning Obligations Policy](#)¹⁸

3.1.4 The Infrastructure Delivery Plan (IDP) establishes what additional infrastructure and service needs are required to support the level of development proposed in the Barrow Borough Local Plan. This has been produced through engagement with infrastructure and service providers, including the Local Highway Authority and the Local Education Authority. The IDP helps to ensure that the additional infrastructure and services that are needed to support development are identified and delivered in a timely, co-ordinated and sustainable way. It is a mechanism for improving delivery of facilities and services for the benefit of local communities. The current Barrow IDP was published in 2018, and work has started on a new IDP for Westmorland and Furness (excluding the parts of the District that are within the two National Parks).

¹⁸ <https://cumbria.gov.uk/eLibrary/Content/Internet/538/755/1599/41590142248.PDF>



- 3.1.5 The IDP is supported by the Barrow Transport Improvement Study 2016 (Stages 1 and 2 Assessments). This sets out traffic modelling results and recommends a number of improvements at junctions in the Borough, including designs and costs. In 2020, a Stage 3 Assessment was produced which prioritises schemes and provides detailed designs and updated costs.
- 3.1.6 More recently, a Local Cycling and Walking Infrastructure Plan (LCWIP) has been published by the former Cumbria County Council, in partnership with the former Barrow Borough Council. This includes a Cycling Priority Network with infrastructure improvements taking place over several phases.

3.2 Section 106 Agreements

Obligations that have been entered (agreed) into in 2024-25

- 3.2.1 Two obligations have been entered into in 2024-25 with monies attached. The first of these relates to the permission for housing development adjacent to Tantabeck, Dalton. The contributions are towards improvements to the junction at Long Lane and Newton Road, Dalton. The improvements to this junction are required as a result of the cumulative effects of development in Dalton over the Local Plan period, as identified in the Barrow Transport Improvement Study.
- 3.2.2 The second obligation relates to the permission for housing development on the site of the former Combe House care home on Walney Island. The contributions are towards affordable housing provision. A formula is set out in the Section 106 agreement, with a provisional contribution of £41,920. In terms of the final figure, the agreement requires the owner to show how the contribution has been calculated in accord with this formula prior to the commencement of development.
- 3.2.3 The preference is that affordable housing is provided on-site. However, a contribution was agreed for the above site due to the application of Vacant Building Credit. The NPPF states that where vacant buildings are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount. The application of Vacant Building Credit was applied to the Combe House site which meant that the affordable requirement was significantly decreased to less than a single dwelling. Therefore, a contribution was agreed.

Planning Application	Item	Amount (£)
B07/2022/0656 Land off Tantabank/East of Brent Avenue, Dalton-in-Furness. Erection of 41 dwellings.	Biodiversity contribution to offset biodiversity net loss caused as a result of the grant of planning permission for development	48,974.50
B07/2022/0592 Land at Combe House, Central Drive, Walney Island, Barrow-in-Furness. Erection of 17 dwellings.	Provision and maintenance of off-site footpath	41,920.00
TOTAL		90,894.50*

*These figures are provisional. See paragraph 3.2.2.

Money received through planning obligations received in 2024-25

- 3.2.4 Monies were received by means of Section 106 agreements from two developments. The first was at Lots Road, Askam. There are two housing developments taking place here. The monies received during the 2024-25 year were related to the northern site. These were for cycleway improvements from Askam to Dalton, as identified in the Barrow Transport Improvement Study, along with traffic management measures at Lots Road.



- 3.2.5 The second development is at Dalton Road, Barrow. This involved an affordable housing contribution. Earlier, full planning permission was granted for 142 dwellings in 2018, prior to there being an Affordable Housing Policy requirement in Barrow. Therefore, no affordable housing was required at that time. More recently, a further planning application was approved for a further 12 dwellings on the site. This time, the requirement for 10% of dwellings to be affordable was in place, resulting in a requirement for one affordable dwelling. Therefore, the result would have been just one affordable unit on a site of 154 dwellings.
- 3.2.6 Rather than providing an on-site or off-site affordable unit, a contribution was agreed instead. The monies were received during the 2024-25 year. No site has currently been formally identified for this spend, although options are currently being considered.

Planning Application	Item	Amount (£)
B07/2020/0648 Land at Lots Road (North), Askam-in-Furness. Erection of 23 dwellings.	Cycleway improvement scheme from Askam to Dalton	13,757.00
B07/2020/0648 Land at Lots Road (North), Askam-in-Furness. Erection of 23 dwellings.	Traffic Management in Lots Road	2,918.00
B07/2022/0720 Land at Dalton Lane, Barrow-in-Furness. Erection of additional 12 dwellings.	Commuted sum, in lieu of the provision of all or any affordable housing units on the development permitted under the Planning Permission	123,000.00
TOTAL		139,675.00

Money spent through planning obligations in 2024-25

- 3.2.6 No monies were spent in 2024-25.

Monies received through planning obligations received and retained (unspent) as at end of 2024-25

- 3.2.7 The table below indicates the monies held from Section 106 obligations unspent as at the end of March 2025.

Planning Application	Item	Amount (£)
B07/2016/0902 Land at Sherborne Avenue, Barrow-in-Furness. Erection of 69 dwellings.	Open Space and Leisure – maintenance of children’s play area and open space at Sherborne Avenue, Barrow	64,142.00
B07/2018/0507 Land at Arthur Street, Barrow-in-Furness. Erection of 58 dwellings.	Towards the cost of a cycle route ID No. 1 as identified in the Barrow Transport Improvement Study and the Infrastructure Delivery Plan Transport and Travel – Cycleway improvements at Lesh Lane and Harrel Lane, Barrow	7,200.00
B06/18/0089 Crompton Drive, Dalton-in-Furness. Erection of 11 dwellings.	Junction improvements at junction of Newton Road and Long Lane, Dalton-in-Furness	8,250.00
B07/2020/0648 Land at Lots Road (North), Askam-in-Furness. Erection of 23 dwellings.	Cycleway improvement scheme from Askam-in-Furness to Dalton-in-Furness and traffic management in Lots Road	16,675.00



Planning Application	Item	Amount (£)
B07/2022/0720 Land at Dalton Lane, Barrow-in-Furness. Erection of 12 additional dwellings.	Commuted sum, in lieu of the provision of all or any affordable housing units on the Development permitted under the Planning Permission	123,000.00
TOTAL		219,267.00

Non-monetary contributions

On – Site Affordable Housing – Planning Obligations entered into 2024-25

3.2.8 One planning permission was granted in 2024-25 with a planning obligation attached to it for the delivery of not less than 4 affordable housing units in total on site as identified below:

- B07/2021/0363 Land at Tantabank Road/East of Brent Avenue, Dalton-in-Furness – 4 affordable units (Shared ownership).



4. Eden Locality (former Eden District Council area)

4.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies

4.1.1 Policy DEV4 of the Eden Local Plan 2014-2032 specifies developer contributions may be sought to fund new infrastructure and, in some cases, they will take the form of a financial contribution. It states in all cases they will be directly, fairly and reasonably related in scale and kind to the proposed development. Infrastructure requirements are set out in the Infrastructure Delivery Plan. The policy defines supporting infrastructure as:

- Essential infrastructure: including adequate highway access and capacity, primary and secondary school placements, clean water supply, adequate wastewater capacity, sustainable drainage systems and energy supply.
- Location specific infrastructure: including transport (cycling and walking facilities, public transport, car parking, electric vehicle charging points), education (education provision including further and higher education facilities, nursery schools), health (GP surgeries, hospitals, ambulance services and adult social care), social (fire police and rescue services, high speed internet access, children's play areas and equipment, sports facilities, supported accommodation including extra care housing, open spaces and parks, social and community facilities and allotments), environmental (natural and semi-natural green spaces, landscaping, replacement/new habitat, flood defences and drainage infrastructure), public services (waste management and disposal, libraries, cemeteries and churchyards and police and fire services).

4.1.2 Policy HS1 of the Eden Local Plan states that the Council will seek to secure the provision of 30% of all new housing as affordable homes on schemes with 11 or more units or more than 1,000m² of floorspace. Where an on-site contribution does not equate precisely to a whole number of units, the contribution will be rounded down to the nearest unit. Size, type and tenure of affordable housing is negotiated on a site-by-site basis based upon the most up to date evidence of housing need.

4.1.3 In the three Market Towns (Alston, Appleby and Kirkby Stephen), the Key Hubs and the Smaller Villages and Hamlets a commuted sum will be required from sites with 6 to 10 units secured by means of a planning obligation. In Other Rural Areas (outside Key Hubs and Smaller Villages and Hamlets), new housing will be restricted to affordable housing.

4.1.4 Where it can be demonstrated that application of the policy will render any housing scheme unviable, fewer affordable homes than required by this policy will be acceptable if a financial appraisal provides evidence to justify any reduced provision.

4.1.5 A Housing Supplementary Planning Document was adopted in April 2020. This provides detailed guidance on the interpretation of housing policies within the Eden Local Plan 2014 - 2032. Changes made to the NPPF in February 2019 may impact on decision making and where possible these instances have been set out in the Housing Supplementary Planning Document.

4.1.6 There is no Eden Local Plan Supplementary Planning Document relating to developer contributions, however, with respect to types of infrastructure such as education and highways, Section 106 contributions were and are currently considered also in line with the Cumbria County Council's Planning Obligations Policy [Cumbria County Council Planning Obligations Policy](https://cumbria.gov.uk/elibrary/Content/Internet/538/755/1599/41590142248.PDF)¹⁹

¹⁹ <https://cumbria.gov.uk/elibrary/Content/Internet/538/755/1599/41590142248.PDF>



- 4.1.7 The 2017 Infrastructure Delivery Plan (IDP) establishes what additional infrastructure and service needs are required to support the level of development proposed in the Eden Local Plan. This was produced through engagement with infrastructure and service providers, including the Local Highway Authority and the Local Education Authority. The IDP helps to ensure that the additional infrastructure and services that are needed to support development are identified and delivered in a timely, co-ordinated and sustainable way. It is a mechanism for improving delivery of facilities and services for the benefit of local communities and will provide a robust framework that will support bids for funding and assist decision making.
- 4.1.8 The IDP notes how new developments place pressure on existing infrastructure which sometimes results in the need for new or improved facilities and services, so developers can be required to contribute to the costs of such provision. This may involve the developer being required to provide or improve the infrastructure - for example improving a road junction or providing open space on a development, or it may involve the developer providing a sum of the money to the local authority to provide the infrastructure, for example a financial contribution towards the cost of providing extra school places. These contributions towards infrastructure are known as 'developer contributions' or 'planning obligations' and are currently agreed between developers and local authorities as part of the planning application process, and are then set out in a Section 106 legal agreement. Work has started on a new IDP for Westmorland and Furness (excluding the parts of the District that are within the two National Parks).
- 4.1.9 The Penrith Parking and Movement Study (PPMS) was jointly commissioned by Cumbria County Council, Eden District Council and Penrith Town Council in 2019. The overarching aim of the study was to understand how existing parking provision in Penrith could be enhanced, whilst maximising connectivity between car parks, for cyclists and walkers within the town centre, key employment areas and the bus and railway station.
- 4.1.10 The PPMS presented the justification for a comprehensive package of interventions to improve parking and movement within Penrith. A total of 39 interventions were shortlisted, and 34 were recommended as part of the PPMS.

These interventions were grouped into eight thematic packages, and a prioritised and costed list of interventions. In July 2022, the Local Cycling and Walking Infrastructure Plan (LCWIP) Technical Report for Penrith was released, which built on the work undertaken as part of the PPMS and provided a more coherent plan for active mode infrastructure in the town.

4.2 Section 106 Agreements

Obligations that have been entered (agreed) into in 2024-25

- 4.2.1 Obligations were entered into for on-site affordable housing provision in relation to planning permission at Land at Staneygarth, Stainton and on land adjacent to Comrie Lea, Temple Sowerby. An obligation was entered into for off-site affordable housing in relation to a planning permission at Westmorland Road, Appleby-in-Westmorland.
- 4.2.2. An obligation has been entered into in respect to nutrient neutrality impacts associated with a planning permission for a 2 storey dwelling at the former Reading Room, Knock, Appleby-in-Westmorland.



Planning Application	Item	Amount (£)
2023/0259 Land at Staynegarth, Stainton. Residential development for 31 dwellings, 9 affordable homes.	Affordable housing (on-site)	0.00
2021/0700 Adjacent to Comrie Lea, Temple Sowerby. Development for 1 affordable bungalow.	Affordable housing (on-site)	0.00
2022/0507 Westmorland Road, Appleby-in-Westmorland. Development of 7 dwellings.	Affordable housing (off-site)	0.00
2022/0815 Former Reading Room, Knock, Appleby-in-Westmorland. Construction of a 2 storey dwelling.	Nutrient Neutrality	0.00
TOTAL		0.00

Money received through planning obligations received in 2024-25

4.2.3 Money was received from planning permission at land off Scour Lane, Lazonby to provide an additional 10 primary school places at Lazonby and 7 additional secondary school places at Penrith, and for the transport of students in Penrith.

4.2.4 No commuted sum monies have been received for the reporting year 2024-25.

Planning Application	Item	Amount (£)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	To provide 10 additional primary school places at Lazonby	58,013.30
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	To provide 10 additional secondary school places at Penrith	76,936.40
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Transport of students to secondary schools in Penrith	25,833.60
TOTAL		160,783.30

Money spent through planning obligations in 2024-25

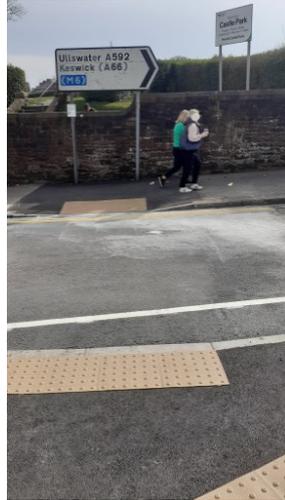
4.2.5 Money in relation to contributions from Carleton Heights, Penrith for the expansion of Beaconside School in Penrith was spent on design development, site investigations and surveys, and the preparation/submission of the planning application.

From March to December 2025, the designs have been developed into detailed proposals. Planning permission was obtained in June 2025 and a small package of advances works took place in the summer to make minor alterations to some KS1 classrooms, prior to the September 2025 academic year starting. The contractors' proposals have been agreed and final governance approval is awaited, with the expectation that construction works will commence in 2026.

4.2.6 Money was spent in relation to contributions from Carleton Heights, Penrith for the introduction of traffic calming measures onto the Carleton Hill Road to ensure the road was compliant with the requirements for the 20mph zone. The scheme consisted of improvements to signage, the installation of 3 bolt on speed tables and road marking improvements. In order to introduce such measures, there is a requirement to consult and advertise the Council's intentions, therefore the contributions were used to undertake these functions.



4.2.7 Monies from Section 106 obligations in relation to development at land off Carleton Road, Penrith were spent to improve pedestrian facilities at the A592 roundabouts and B5288 Norfolk Road, Penrith.



Figures 2 and 3: Between Castle Park and northwest footway



Figures 4 and 5: Central Island crossing point between northwest and northeast footways



Figure 6: Crossing point northeast footway between Morrisons service access and Agricultural Hotel



4.2.8 No monies have been spent towards Affordable Housing. £240,000 has been set aside for Home Group for the provision of Affordable Housing, this will be spent and reported in the 2025-26 Infrastructure Funding Statement.

Planning Application	Item	Amount (£)
08/0291 Carleton Heights, Penrith. Erection of 505 dwellings.	Education – new primary school on land to be transferred to the Council or alternative education facilities including improvements or extensions to existing schools	93,143.75
08/0291 Carleton Heights, Penrith. Erection of 505 dwellings.	Two contributions comprising of 32,337.00 for traffic calming, and 13,885.00 for traffic management, totalling 46,222	17,287.07
19/0426 Land off Carleton Road, Penrith (Frenchfield side south of A686).	Cromwell Road Highway contribution – creation of pedestrian facilities at the A592 roundabouts and B5299 Norfolk Road, Penrith	31,839.26
TOTAL		142,270.08

Monies received through planning obligations received and retained (unspent) as at end of 2024-25

4.2.9 The table below shows all monies held and retained for spending as at the end of 2024-25, of which £187,000 from the balance below was spent and reported in the 2023-24 Infrastructure Funding Statement.

Planning Application	Item	Amount (£)
08/0295, 16/0056 Land at Carleton Hill, Penrith. Erection of 44 dwellings.	Off-site affordable housing provision (through commuted sums)	839,129.30
08/0295, 16/0056 Land at Carleton Hill, Penrith. Erection of 44 dwellings.	Towards the cost of providing 11 additional places either at existing primary schools or towards the construction of a new school building serving the east of Penrith.	222,974.00 (money committed to be spent on the expansion of Beaconside School in Penrith)
08/0291 Carleton Heights, Penrith. Erection of 505 dwellings.	Education – new primary school on land to be transferred to the Council or alternative education facilities including improvements or extensions to existing schools	1,877,386.11 (money committed to be spent on the expansion of Beaconside School in Penrith)
08/0291 Carleton Heights, Penrith. Erection of 505 dwellings.	Two contributions comprising of 32,337.00 for traffic calming, and 13,885.00 for traffic management. Total = 46,222.00	28,934.93
15/0799 Land at Salkeld Road, Fairhill, Penrith. Erection of 98 dwellings.	To support new primary school places	Two contributions comprising of 212,178.69 and 214,096.50. Total = 426,275.19 (219,858.05 of which is committed to be spent on the expansion of Beaconside School in Penrith)



Planning Application	Item	Amount (£)
13/0654 Land off Carleton Meadows, Penrith. Erection of 55 dwellings.	To support new primary school places	247,864.95 (money committed to be spent on the expansion of Beaconside School in Penrith)
13/0033 Land to the South of A686 at Carleton, Penrith. Erection of 96 dwellings.	Education – new primary school contribution	Two contributions comprising of 183,765.92 and 188,419.84. Total = 372,185.76
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education to provide 10 additional primary school places at Lazonby	57,264.00 (1 st contribution)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education to provide 7 additional secondary school places at Penrith	75,943.99 (1 st contribution)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education – transport of students to secondary schools in Penrith	25,500.37 (1 st contribution)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education to provide 10 additional primary school places at Lazonby	58,013.30 (2nd contribution)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education to provide 7 additional secondary school places at Penrith	76,936.40 (2nd contribution)
17/0016 Land off Scour Lane, Lazonby. Erection of 59 dwellings.	Education – transport of students to secondary schools in Penrith	25,833.60 (2nd contribution)
20/0402 Land off Greenbank Road, Eden Business Park, Penrith. New build private training pool (D2 Assembly and Leisure)	Travel Plan monitoring	6,600.00
15/0974 Land north of Pennine Close, Hackthorpe, Penrith. Reserved matters 18/1009. Erection of 30 dwellings	Cost of additional secondary school children being transported to the local school	14,250.00
10/1010 Melmerby Hall, Melmerby. Erection of 3 dwellings.	Off-site affordable housing provision (through commuted sums)	30,000.00
11/0161 The Old Brewery, Alston. Change of use from offices to a single dwelling.	Off-site affordable housing provision (through commuted sums)	4,500.00
11/0576 Hube View Row End Farm, Warcop. Barn conversion of existing barn to form a two bedroom dwelling.	Off-site affordable housing provision (through commuted sums)	5,334.00
11/0654 Bark Mill House, Lazonby. Erection of a single dwelling to include a garage and carport.	Off-site affordable housing provision (through commuted sums)	7,986.00
11/0740 Greggs Bakery, Friargate, Penrith. Demolition of bakery building and erection of retirement housing, communal facilities and landscaping.	Off-site affordable housing provision (through commuted sums)	128,797.19
12/0085 Auction Mart Lane, Penrith. Change of use from a store to one bedroom flat	Off-site affordable housing provision (through commuted sums)	1,454.17



Planning Application	Item	Amount (£)
12/0101 The Barn, Martindale. Change of use from agricultural barn to residential use, construction of a garage, parking and garden area	Off-site affordable housing provision (through commuted sums)	10,500.00
12/0249 The Bulls Head Inn, Shap. Change of use from pub, restaurant and flat to 1 house and 2 flats	Off-site affordable housing provision (through commuted sums)	9,250.00
12/0368 Temperance Hall, Warcop. Erection of 2 detached dwellings	Off-site affordable housing provision (through commuted sums)	11,498.50
12/0456 Joiners Cottage, Swan Avenue, Brough. Conversion of workshop into 2 dwellings	Off-site affordable housing provision (through commuted sums)	4,440.00
12/0491 Merridene Station Road, Shap. Erection of 3 dwellings	Off-site affordable housing provision (through commuted sums)	4,350.00
13/0084 The Linney, Appleby-in-Westmorland. Conversion of workshop to a single dwelling.	Off-site affordable housing provision (through commuted sums)	1,230.00
13/0100 Pasture Park, Soulby. Erection of 3 dwellings.	Off-site affordable housing provision (through commuted sums)	36,000.00
13/0213 Bromley Green Farm, Great Ormsicle. Conversion of a barn to a single dwelling	Off-site affordable housing provision (through commuted sums)	4,890.00
13/0262 Bankfoot View, Nenthead. Conversion of single dwelling to create 3 dwellings.	Off-site affordable housing provision (through commuted sums)	4,060.00
13/0288 Old Fellows Hall, Brough. Change of use from store/workshop to residential	Off-site affordable housing provision (through commuted sums)	2,500.00
13/0298 and 14/0190 Land adjacent to Hazlebank Gardens, Yanwath. Erection of 1 detached dwelling.	Off-site affordable housing provision (through commuted sums)	18,975.00
13/0519 Blacksheep Barn, Thwaite Cottage, Penrith. Barn conversion to create a dwelling.	Off-site affordable housing provision (through commuted sums)	5,700.00
13/0751 Warcop House, Warcop. Subdivision of a 9 bed house into 2 5 bed houses	Off-site affordable housing provision (through commuted sums)	3,660.00
13/0962 Barco Lodge, Folly Lane, Penrith. Demolition of stables and rebuild to provide a new dwelling	Off-site affordable housing provision (through commuted sums)	4,500.00
14/0490 King Street, Penrith. Creation of 2 dwellings (flats)	Off-site affordable housing provision (through commuted sums)	4,770.00
14/0677 Pea Top Farm, Culgaith, Penrith. Division of existing dwelling to create additional dwelling	Off-site affordable housing provision (through commuted sums)	5,850.00
14/0782 Westmorland Rise, Appleby-in-Westmorland. Erection of 3 dwellings.	Off-site affordable housing provision (through commuted sums)	8,160.00



Planning Application	Item	Amount (£)
14/6170 Robin Hood View Cottage, Winskill	Off-site affordable housing provision (through commuted sums)	7,000.00
15/0727 Phoenix Hall, Skelton. Variation of condition attached to 13/0874 for modified design to alternative accommodation	Off-site affordable housing provision (through commuted sums)	6,450.00
16/0294 Fellside Nicholson Lane, Penrith. Erection of 2 detached houses with integral garages	Off-site affordable housing provision (through commuted sums)	8,250.00
12/0424 Barney Scar, Soulby. Erection of 1 dwelling.	Off-site affordable housing provision (through commuted sums)	16,850.00
19/0222 Langwathby Hall Farm, Langwathby, Penrith. Erection of 25 dwellings.	Education for secondary school infrastructure	49,252.32
19/0222 Langwathby Hall Farm, Langwathby, Penrith. Erection of 25 dwellings.	Secondary school transport infrastructure	38,114.00
16/0968 Land west of Gillians Well, Calthwaite, Penrith. Erection of up to 16 dwellings.	Secondary school transport infrastructure	76,000.00
15/0728 Eden Grove, Bolton, Appleby. Erection of 31 dwellings.	Capacity at Bolton Primary School, Appleby or to transport children to the nearest school	38,976.55
15/0728 Eden Grove, Bolton, Appleby. Erection of 31 dwellings.	Footpath improvements/construction between the property and Bolton, Appleby	19,095.31
17/0333 Land east of the Thorpe, Greystoke, Penrith. Outline application for up to 40 dwellings all matters reserved except access (re-submission of 16/0092)	Bus Service – a 16 seater vehicle that shall operate once a week for 5 years. The service shall operate a return trip from the site to Penrith	38,747.35
17/0333 Land east of the Thorpe, Greystoke, Penrith. Outline application for up to 40 dwellings all matters reserved except access (re-submission of 16/0092)	Provision of transport for children who live on the development to Queen Elizabeth Grammar School, Penrith or a suitable alternative	45,835.63
17/0660 Field adjacent to Byrnes Close, Plumpton, Penrith. Erection of 28 dwellings.	Secondary school transport contribution	25,076.25
19/0426 Land off Carleton Road, Penrith (Frenchfield side south of A686). Erection of 149 dwellings.	Carleton Road Highways contribution – widening of footways and improvements to toucan crossing and pedestrian island on Carleton Road	52,028.61
19/0426 Land off Carleton Road, Penrith (Frenchfield side south of A686). Erection of 149 dwellings.	Travel Plan monitoring	6,600.00
19/0426 Land off Carleton Road, Penrith (Frenchfield side south of A686). Erection of 149 dwellings.	Corney Place Highway Contribution – reconfiguration of the highway at Corney Place	136,971.52
19/0426 Land off Carleton Road, Penrith (Frenchfield side south of A686). Erection of 149 dwellings.	Primary school capacity for additional pupils	663,595.06
TOTAL		5,715,339.36



Non-Monetary Contributions

Affordable Housing Delivery – On-site delivery 2024-25

4.2.10 The table below indicates the number of affordable homes delivered on-site through Section 106 obligations in 2024-25. In total 146 affordable houses were delivered in 2024-25.

Planning Application	Affordable Homes delivered
14/0405 Land at Raiselands Farm, Scotland Road, Penrith. Erection of 229 new build homes.	68
08/0291 Carleton Heights, Penrith. Erection of 505 dwellings.	8
19/0840 Carleton Road, Penrith. Residential development of 149 dwellings.	31
21/0700 Adjacent to Comrie Lea, Temple Sowerby. Erection of bungalow.	1
22/0256 Inglewood Road, Penrith. Erection of 194 dwellings.	29
23/0259 Land at Staynegarth, Stainton. Erection of 31 dwellings. Residential development with 30% affordable housing.	9

On-Site Affordable Housing – Planning Obligations entered into 2024-25

4.2.11 Six planning permissions were granted in 2024-25 with planning obligations attached to them for the delivery of 64 affordable housing units in total on site as identified below:

- 17/0080 Land west of Sockbridge, Thorpe Fields, Sockbridge - 2 dwellings for affordable housing use.
- 17/0168 Elm Close, High Hesket – 6 dwellings consisting of 3 affordable housing and 3 intermediate housing units.
- 19/0272 Land North of Newbiggin Road, Kirkby Thore, Penrith – 7 dwellings for affordable housing use.
- 19/0820 Edenside Residential Care Home, Appleby-in-Westmorland – 16 dwellings for Social, Affordable or Intermediate Rent with a commuted sum of 7% of the Gross Development Value.
- 21/0370 Land South of Low Hesket Village Hall, Low Hesket - 3 dwellings for affordable housing use.
- 21/1029 Land at Station Road, Appleby-in-Westmorland - 30 dwellings for Social, Affordable or Intermediate Rent.

4.2.12 In addition, as reported in Section 4.2.9 an off-site affordable housing contribution for 7 dwellings has been entered into in relation to 22/0507 Westmorland Road, Appleby-in-Westmorland.



5. Section 278 Agreements

5.1 Obligations that have been entered (agreed) into in 2024-2025

5.1.1 The following agreements under Section 278 of the Highways Act 1980 were entered into during the reported year.

Planning Application	Summary of Section 278 Works	Amount (£)
23/0416 Land at Carleton Hall Farm, Penrith. Erection of a convenience store, including associated operations.	Formation of new access, pedestrian refuge island and footpath. Road marking improvements and reduction in speed limit to 30mph on the A686	62,225.00
20/0616 Land at White Ox Farm, Inglewood Road, Penrith. Erection of affordable housing development comprising of 67 residential dwellings.	Construction of new footway and installation of new toucan crossing on the A6 Scotland Road. Construction of new footway and drainage on Inglewood Road. Extension of the 30mph on Inglewood Road	207,742.00
S/03/637 Land off Station Road, Sedbergh. Erection of 49 dwellings, external works and landscaping.	Formation of new access, widening of existing footway and relocation of existing street lighting columns on Station Road	43,973.75
TOTAL		313,940.75

5.2 Money spent through planning obligations in 2024-2025

5.2.1 No infrastructure was provided by a Section 278 Highways agreement in the reported year.

