



Examination of the South Gloucestershire Local Plan

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Examination web pages: <https://localplanexamination.commonplace.is/>

GUIDANCE NOTE FROM THE INSPECTORS

Purpose

1. The South Gloucestershire Local Plan (the Plan) was submitted for examination on 24 October 2025. We have been appointed by the Secretary of State to conduct the examination. This note provides guidance on the procedural and administrative arrangements for the examination.
2. Further information on the examination process can be found in the Planning Inspectorate's publication 'Procedure Guide for Local Plan Examinations' which is available via <https://www.gov.uk/guidance/local-plans>. There is also a short guide aimed particularly at those taking part in an examination for the first time.

Programme Officer

3. Robert Young is the Programme Officer (PO) for the examination. He is working under our direction and is independent of the Council. His contact details are given above. At the hearings he will be supported by Natasha Archer and Lisa Kybert.
4. The main tasks of the PO are to act as the channel of communication between Inspectors, the Council and representors and participants, to liaise with all parties to ensure the smooth running of the examination, to organise the hearing programme, and to oversee the publication of documents on the examination webpage.
5. Any procedural questions or other matters that you wish to raise should be directed to the PO.

Examination webpage

6. The examination webpage content is controlled by the Inspectors and the PO. All documents for the examination, including the evidence base and the procedural material, are published on the examination webpage which is hosted by the Council – the link is provided above.
7. If you do not have access to the internet, please contact the PO so that alternative arrangements can be put in place.

Inspectors' role

8. Our task is to consider whether the submitted Plan complies with the relevant legislation and is sound. The National Planning Policy Framework December 2023 (NPPF) (paragraph 35) makes it clear that in order to be found sound the Plan must be:
 - a) positively prepared – providing a strategy which, as a minimum, seeks to meet the area's objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;
 - b) justified – an appropriate strategy taking into account the reasonable alternatives, and based on proportionate evidence;
 - c) effective – deliverable over the plan period and based on effective joint working on cross boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and
 - d) consistent with national policy – enabling the delivery of sustainable development in accordance with the NPPF's policies and other statements of national policy, where relevant.
9. It is not part of our role to make improvements to the Plan, provided that it is sound and legally-compliant.
10. It is important to note that the Plan is being examined under the transitional arrangements set out in NPPF (last updated in February 2025) in paragraphs 234 and 235, which means that the Plan will be examined against the version of the NPPF published in December 2023.
11. S33A of the Planning and Compulsory Purchase Act 2004 set out a duty to co-operate in relation to planning of sustainable development. The new plan-making system provided by the Levelling-Up and Regeneration Act 2023 does not include the Duty to Cooperate, and once the Regulations¹ are in place (25 March 2026), the duty to cooperate requirement for plans in the current system (including this Plan) will be removed.

¹ Levelling-up and Regeneration Act 2023 (Commencement No.11 and Saving and Transitional Provisions) Regulations 2026.

The examination

12. There are three possible outcomes to the examination:
- the submitted plan is sound and legally compliant;
 - the submitted plan is not sound and/or legally compliant but could be made so by changes (known as main modifications), if necessary, following the preparation of additional evidence; or
 - the submitted plan is not sound and could not be made sound by changes. If so, we would be likely to recommend that the Council withdraws the plan. The same would apply if there is a failure of legal compliance which cannot be remedied.
13. After the hearing has closed, we will prepare a report for the Council setting out our conclusions and recommendations. Our report will deal with the main issues of soundness and legal compliance, taking into account the representations made but without responding to each of them.

Changes to the plan

14. The starting point for the examination is that the Council has submitted a plan which they think is ready for examination.² Now that the Plan has been submitted there are only two means by which changes can be made to it:
- a) as main modifications recommended by the Inspectors; or
 - b) as additional modifications made by the Council.
15. We can only recommend main modifications if they are necessary to make the submitted Plan sound and/or legally-compliant. Any potential main modifications must be subject to consultation before we recommend them, and in some cases, they may also require further sustainability appraisal, and Habitats Regulations Assessment.
16. Additional modifications (sometimes also referred to as “minor modifications”) are changes which do not materially affect the policies in the Plan. They may be made by the Council on adoption and do not fall within the scope of the examination. The Council are accountable for any additional modifications that are made.
17. We are examining the South Gloucestershire Local Plan Regulation 19 2025 Consultation Document (the Plan), which was published for consultation between 28 February and 11 April 2025.
18. The Council has provided in document CSD/05 Proposed Modifications to Local Plan Document and Appendices, a number of suggested main and additional

² S20(2) of the Planning and Compulsory Purchase Act 2004

modifications to the Plan and we expect further suggested main modifications in due course. These are not part of the Plan we are examining and have not been subject to consultation. We will however have regard to them, along with suggested changes to the Plan made by representors.

19. The Policies Map is not defined in legislation as a development plan document. This means that we have no powers to recommend main modifications directly to it. However, as the role of the Policies Map is to illustrate geographically the application of policies in the Plan, if the geographical illustration of a policy is flawed, the policy will be unsound. In such circumstances, we would ask the Council to draw up a proposed change to what is shown on the submission Policies Map.

Representations made on the Plan

20. The Council has prepared a Consultation Statement (Regulation 22) (CSD/03) which includes details of the consultation that has taken place on the Plan, and a summary of the main issues raised in the representations.
21. A full set of the representations made on the Plan at the pre-submission (Regulation 19) stage has been provided to us (and can be viewed on the Examination website) and we will take them all into account. The legislation does not require us to take account of any representations made at any earlier stage, including under Regulation 18.

Examination hearing

22. The examination hearing, which forms part of the examination of the Plan, will commence at **9.30 am on Tuesday 19 May 2026**. The hearings will be held in the Kingswood Civic Centre. The draft programme (document ID/10) for the hearing is being issued at the same time as this guidance note.
23. Discussion at the hearing will be based on our matters, issues and questions (document ID/09), which are issued at the same time as this guidance note. A more focussed agenda providing further guidance for the discussions may be published in advance of one or more of the hearing sessions. The timings on the draft programme are liable to change once the number of participants of each session is finalised and we advise that participants check the examination website for updates.

The scope of our examination, and omission sites

24. Some representations are concerned with what are known as “omission sites”. These are sites which have not been allocated in the Plan for development. However, our role is to examine the soundness of the submitted Plan. It is not part of our role to examine the soundness of sites that are not allocated in the Plan. Consequently, we will not hold a hearing session dealing specifically with sites that have not been allocated in the Plan, nor will we discuss the merits of omission sites at other session(s).

Attending the hearing

25. Anyone may attend the hearing as an observer, but only those who have made representation(s) seeking to change the Plan have a right to appear before, and be heard by, the Inspectors.
26. Written representations carry the same weight as those made orally at a hearing session, and much of our examination is a written process. Participation at the hearing is therefore only likely to be beneficial if you have specific points to contribute on the published matters, issues and questions. Normally you may only take part in the hearing session(s) that are relevant to your original representation(s).
27. If you have a right to be heard and you wish to exercise that right, you should contact the PO by **5.00 pm on Friday 10 April 2026** indicating which session(s) in the published hearing programme you wish to participate in. You must do this regardless of what you may have indicated in your original representation(s). Please note that if you do not contact the PO by that date, it will be assumed that you do not wish to appear and be heard, and you will not be listed as a participant.
28. Representors who are not seeking changes to the Plan, including those who have made representations supporting it, do not have a right to take part in the hearing. However, we may invite additional participants to take part in the hearing if we consider that their participation would assist us in determining the soundness and legal compliance of the Plan.
29. To ensure that there is sufficient space, organisations participating in the hearing sessions will normally be allocated one seat at the hearing, with members of their team “hot-seating” as necessary. Similarly, unless space permits, the Council may need to limit the number of its representatives to those needed to deal with the topic under discussion.
30. Where several representors or organisations who have similar points to make wish to attend the hearing, it would assist us if they would arrange to be represented by one or two spokesperson(s).
31. Please let the PO know as soon as possible if you have any specific needs or requirements to enable your attendance at and/or participation in the hearing session(s).

Hearing statements

32. In order to assess the legal compliance and soundness of the Plan, we pose many questions in our matters, issues and questions document. It is our hope that many of the questions set out in that document will be answered in written statements. Consequently, we will not need to consider them further at the hearings as we would have sufficient information, enabling us to focus on the outstanding matters. It is important to note that we will have equal regard to views put at a hearing or in writing.

33. The Council should produce a statement for each matter responding to all the identified matters, issues and questions.
34. Where the Council proposes main modifications to the Plan, their written statements in response to our matters, issues and questions (MIQs) should refer to them and explain why they consider that they are necessary for legal compliance or soundness (against the tests of soundness set out in the NPPF).
35. Other participants in the hearing sessions should only submit hearing statements if they have points to make on the identified matters, issues and questions. Statements should be concise and focussed, and in any event must contain no more than 3,000 words for each matter. They should:
 - clearly identify (by reference number) which specific matters, issues and questions are being answered;
 - only answer the specific matters, issues and questions which are of direct relevance to your original representation(s);
 - not introduce new evidence or arguments,
 - provide a separate submission for each matter being addressed.
36. We appreciate that the Council has been updating parts of the evidence base and that circumstances may have moved on for some issues and topics from when you made your representations. You are strongly advised to read the updated evidence to assist you in preparing your statements.
37. Please refrain from commenting on matters which go beyond the scope of our questions.
38. Appendices should only be included if they are directly relevant and necessary and should not be used as a means of increasing the word-count. In this regard, do not submit further statements in the guise of appendices. If you need to refer to a large document that is not on the examination webpage, please contact the PO as it may be more efficient for it to be added to the webpage rather than attached to a statement.
39. The Council statements should also be focussed and succinct. However, because the Council have to answer every issue and question and explain their proposed main modifications, it may be necessary to go over the limit of 3,000 words per matter. Written statements should be provided by **5.00 pm on Tuesday 28 April 2026**.
40. It is intended that all examination documents will be electronic versions. Please email electronic versions of your statement(s) and any appendices to the PO in Word or PDF format by the relevant deadlines as above. If you are unable to email your statement, please contact the PO so that alternative arrangements can be made.
41. Hearing statements will be posted on the examination webpage after the submission date, so that they are available to all participants and anyone else

who wishes to read them. Because they will be available in this way, they will not be circulated directly to participants. Anyone who is unable to access them on the webpage should contact the PO. Representors should redact any sensitive data prior to the submission of hearing statements as statements will be published and made available publicly.

42. Once the date for submitting hearing statements has passed, no other written evidence will be accepted, unless we specifically request it. In fairness to other participants the hearing sessions should not be used to introduce additional or new evidence.

Statements of Common Ground

43. The NPPF in paragraph 27, expects one or more statement(s) of common ground (SoCG) to be produced documenting the cross-boundary matters being addressed and progress in co-operating to address them.
44. It is often also useful for SoCGs to be drawn up between a Council and other public bodies, other participants or site promoters to confirm specific matters that have been agreed, particularly if those matters have previously been the subject of representations raising soundness or legal compliance issues. SoCGs should also helpfully highlight matters that remain in contention, or the position regarding individual allocated sites.
45. If any further SoCGs are to be prepared or finalised, then they should, wherever possible, be completed **by Friday 10 April 2026** and published as examination documents so that other representors are aware of their contents before submitting their hearing statements. This should not preclude the Council from continuing to engage on outstanding issues with other bodies and updating any SoCGs as necessary.

Conduct of the hearing sessions

46. The hearing sessions will be based on the identified matters, issues and questions. To maximise the effectiveness of hearing time, we will focus on key issues and matters where after reading statements, we need further information. So, where written responses to our matters, issues and questions provide us with the information we need on a particular issue, we will explain that and may not consider that issue further at the hearing. Our approach is being undertaken for efficiency and does not affect a representors right to be heard as set out in legislation.
47. Each hearing session will deal with these by way of a structured discussion which we will lead, taking an inquisitorial approach. There will be no formal presentation of cases or cross-examination. Participants may, if they wish, bring professional experts with them, although this is not essential.
48. Discussion at the hearing sessions will focus on the issues that we need to hear further discussion about, in order to reach conclusions on the soundness and

legal compliance of the Plan, and on any potential need for main modifications. We will make a few brief introductory comments on the issues to be covered and then invite individuals to respond to our specific questions. We will have read all the relevant representations and statements beforehand, and will expect other participants to have done so as well. The hearing sessions are not an opportunity to repeat a case already set out in written representations, or to make general statements.

Hearing programme

49. The hearing sessions will normally start at 9.30 am each day. Updates to the hearing programme, if required, will be available on the examination webpage. It is the responsibility of individual participants to check the latest timetable and to ensure that they are present at the correct time, as timings are liable to change. Short breaks will normally be taken at convenient points.

Site visits

50. We will carry out site visits before, during, or after the hearing as necessary to inform our assessment of the soundness of the Plan. All site visits will be unaccompanied, unless it is necessary to go onto private land, in which case we will make the necessary arrangements via the PO.

Close of the examination

51. The examination will close when our report is submitted to the Council. However, unless we specifically request them, no further representations or evidence will be accepted after the hearing sessions have finished. Late or unsolicited material may be returned.

Summary of the examination programme

- 17 March 2026- Matters, issues and questions, draft hearing programme and Inspectors' guidance note published.
- 5.00 pm on Friday 10 April 2026 - Deadline to confirm with the PO whether you wish to exercise your right to appear at an examination hearing session.
- 5.00 pm on Friday 10 April 2026 - Deadline for submission of statements of common ground.
- 5.00 pm on Tuesday 28 April 2026 - Deadline for submission of hearing statements.
- 9.30 am on Tuesday 19 May 2026 - Hearing sessions begin.

Further information

52. Further information about the preparation and examination of Local Plans is available as follows:

Relevant guidance – available from <https://www.gov.uk/guidance/local-plans>

Procedure Guide for Local Plan Examinations

Short guide to taking part in local plan examinations

National Planning Policy Framework (December 2023)

Planning Practice Guidance, including the section on Plan-making

Relevant legislation – available at <http://www.legislation.gov.uk/>

Planning and Compulsory Purchase Act 2004 (as amended)

The Town and Country Planning (Local Planning) (England) Regulations 2012
(as amended)

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INSPECTORS