



**Greater Christchurch
Partnership**

Te Tira Tū Tahi
One Group, Standing Together

OUR SPACE 2018-2048

Greater Christchurch Settlement Pattern Update

Whakahāngai O Te Hōrapa Nohoanga

*Endorsed by the Greater Christchurch Partnership Committee on
14 June 2019 and Recommended for Council Adoption*

**Hārō ana te kāhu i te ipukarea o Tahu Pōtiki
Tau atu rā ki te tihi o tōku pou tīpua
Aoraki Matatū, Aoraki Mataoho
Ka mihi ki ngā maunga, ka mihi ki ngā awa
Tīhei Mauri Ora**

**Tēnei te mihi ki ngā tātaitanga o te takiwa nei
Kia tākina te hono kia puawai te kaupapa
me ngā hua o te Mātāpono ki ū, kia mau
hui e! Tāiki e**

The Kāhu soars the lands of Tahu Pōtiki
And settles on the summit of my ancestral mountain
Aoraki Steadfast, Aoraki Vigilant
It acknowledges all the mountains and rivers
Behold the essence of life

We acknowledge those with a vested connection to the land,
who ensure this bond on the collaboration of this document
and the values within to ensure its longevity
Together in Unity!

Message from the Strategy Partners

The Greater Christchurch Partnership continues to demonstrate the cross-agency collaboration and leadership required to effectively plan for and manage urban development across the Greater Christchurch area; working together to address those key strategic issues that span council and political boundaries. Te Tira Tū Tahi - One Group, Standing Together.

Our Space 2018-2048: Greater Christchurch Settlement Pattern Update Whakahāngai O Te Hōrapa Nohoanga represents a further building block to ensure our partnership approach to planning takes account how things have changed in recent years, and what demands and trends might shape the future of our urban areas during the next thirty years. Its particular focus is how best to accommodate housing and business land use needs in a way that integrates with transport and other infrastructure provision, building greater community resilience, and contributing to a sustainable future for Greater Christchurch that meets the needs and aspirations of our existing communities and future generations.

We first recognised the need to undertake this work when we adopted an update to the Greater Christchurch Urban Development Strategy in 2016. This was then reinforced by the development of the National Policy Statement on Urban Development Capacity, which requires councils with high growth urban areas to produce a 'future development strategy' demonstrating there will be sufficient development capacity to meet future needs. Our Space has been collaboratively prepared to satisfy this requirement for Greater Christchurch's councils.

The strategic planning directions contained in this document have been strongly guided by the vision, goals and principles enshrined in the Urban Development Strategy, which continue to provide the roadmap for growth planning in Greater Christchurch. Our Space therefore does not seek to replace this comprehensive strategy, but rather builds on it by considering and updating many of our key settlement pattern matters. Other plans, strategies and initiatives referred to in this document also complement Our Space; helping provide a broader wellbeing approach that ensures Greater Christchurch remains an attractive place for people to live, learn, work, visit and invest.

We would like to acknowledge and thank those that have helped shape this document, and would encourage all to contribute to its implementation and the realisation of our shared vision for the future of Greater Christchurch.

Greater Christchurch has responded to the initial challenges following the earthquakes of 2010 and 2011 and is now embracing the opportunities that lie ahead to help us realise our long term vision - *mō tātou, ā, mō kā uri ā muri ake nei*, for us and our children after us.

A growing urban area can bring future prosperity and enrich our lives and communities, but only if it is managed so we protect and enhance the aspects we value the most and that make it a unique place for people to choose to live, learn, work, visit and invest. Greater Christchurch is growing, with the population expected to grow to about 640,000 by 2048, some 150,000 more people than today.

Planning for future urban growth in Greater Christchurch must also be informed and guided by the principles that are relevant to the exercise by *mana whenua* of *kaitiakitanga*. Integral to the exercise of *kaitiakitanga* are the values of respect, reciprocity and sustainability. For *mana whenua*, it is vital that the effects associated with urban growth are managed so as to avoid the degradation of the natural environment – including our coastal environment, waterways and landscapes.

The Greater Christchurch Partnership has worked collaboratively for more than a decade on planning and managing urban growth and development across Greater Christchurch. This Partnership brings together the leadership roles of local government, Te Rūnanga o Ngāi Tahu, the district health board and government agencies and is guided by the vision, principles and strategic goals outlined in the Urban Development Strategy (UDS).

This Update to the UDS addresses various aspects of that Strategy as it:

- focuses on the critical role of how our urban areas accommodate growth and how efficient infrastructure planning can support and guide development decisions;
- reaffirms and builds on existing plans that show we are already well-placed for future development over the next 30 years;
- balances the projected future demands of housing and business markets with the urban form that will best enable sustainable growth;
- recognises that how we live today will be quite different to 30 years from now, so we need to be responsive to these changes, grasping the opportunities afforded by Government policy and emerging technologies to make this transition.

In so doing, this Update demonstrates that there will be sufficient, feasible development capacity¹ in the medium and long term while maintaining an urban form that helps achieve the UDS vision and strategic goals. Two challenges stand out in this regard:

1. *How can future housing provision be affordable, high quality and cater for an aging population that is linked to a more general trend for more one-person and couple-only households?*
2. *And how can our urban areas grow, through redevelopment and new greenfield subdivisions, without increasing the congestion that would ensue if our current travel patterns remain?*

The solutions to these and other challenges will come from a wide range of responses from public agencies, the private sector and communities. Many drivers of change are uncertain, so regular monitoring and review is critical.

This Update outlines the planning framework that integrates and guides other work and demonstrates the commitment of the partners to achieving its strategic goals. It has been informed by an assessment of where we are

¹ Development capacity refers to the amount of land for development enabled in plans and supported by infrastructure. This development capacity can be provided either 'outwards' on greenfield land or 'inwards' by redeveloping existing urban areas (infill and intensification).

now and anticipated future demands, and aligns with recently adopted Long Term Plans and infrastructure strategies of the constituent councils. Specifically it:

- sets out how targets for housing for the next 30 years will be met, accommodating an additional 150,000 people;
- identifies locations for housing growth, encouraging Central City and suburban centre living while providing for township growth in Rolleston, Rangiora and Kaiapoi;
- reinforces the role of key centres in providing additional retail and office floorspace as required, in particular the Central City and, if needed, a transition of its surrounding light industrial zones;
- promotes a compact urban form, which provides for efficient transport and locates development in a manner that takes into account climate change and sea level rise
- recognises the existing industrial land provision as sufficient to cater for industrial growth for some time yet;
- outlines a series of implementation actions and further work required to give effect to the Update.

It responds to the new Government Policy Statement on Land Transport, which has increased funding for mass public transit schemes, and meets the requirement of the National Policy Statement on Urban Development Capacity (NPS-UDC) 2016 to prepare a future development strategy.

Many other plans, strategies and initiatives will complement this Update in improving our wider social, economic, cultural and environmental wellbeing. The Canterbury Regional Public Transport Plan (RPTP) contains an ambitious vision to fully integrate the public transport system with the wider transport system and urban form, thereby increasing mobility and accessibility across Greater Christchurch. Development and implementation of recovery and regeneration plans for central Christchurch, the Ōtākaro Avon River Corridor (currently being developed) and Kaiapoi address the future land uses of areas most affected by the earthquakes. Coastal hazards, climate change and Carbon Zero projects are underway to better understand the resilience and adaptation needs of Greater Christchurch. And economic and social enterprise strategies help position the City and the region to thrive and show we are open for business and innovation.

This Update is therefore an important piece of the jigsaw that provides certainty for the sustained and collective investment we can all make to the wellbeing of Greater Christchurch, Our Space.

Have Your Say *He Kōrero Āu*

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SUPPORTING DOCUMENTS *Ngā Puka Taunaki*

- A. Greater Christchurch Housing and Business Development Capacity Assessment

The Greater Christchurch Partnership² has worked collaboratively for more than a decade on planning and managing urban growth and development in Greater Christchurch to support the long term needs of people and communities. This includes the development of the Urban Development Strategy (UDS) in 2007, and the crucial role the Partnership and its constituent partners played coordinating and facilitating rebuild and recovery activities after the earthquakes.

The Partnership has now reviewed the settlement pattern for Greater Christchurch. This review (referred to as the Settlement Pattern Update or the Update) has been undertaken to satisfy the requirements of the National Policy Statement on Urban Development Capacity (NPS-UDC) for high growth councils to produce a 'future development strategy' that shows there will be sufficient, feasible development capacity to support housing and business growth needs over the medium³ (next 10 years) and long term (10 to 30 years) (see Section 2.4 for further detail on the NPS-UDC).

A collaborative approach makes sense because the urban areas and the transport networks across Greater Christchurch function as one interconnected system. Rather than developing an entirely new strategy the Update builds on the existing UDS to meet the NPS-UDC requirements, and this is encouraged in supporting guidance on implementing the NPS-UDC.

This Update comprises a review of the land use framework outlined for Greater Christchurch in the Land Use Recovery Plan and in key resource management documents, such as the Canterbury Regional Policy Statement and district plans. It considers how best to accommodate our future housing and business needs based on the comprehensive strategic planning framework that already exists for Greater Christchurch, being guided by the vision, principles and strategic goals established in the UDS and informed by a Capacity Assessment and relevant Long Term Plans and infrastructure strategies.⁴

Our plan for supporting housing and business growth in Greater Christchurch has been shaped by key considerations relating to planning for sustainable urban development, including how we can:

- achieve our desired urban form while supporting our increasing housing and business needs;
- provide for the diversity of housing that meets the needs of a changing resident population;
- integrate land use and transport planning to ensure we create safe, accessible and liveable urban areas.

To ensure that the processes, priorities and outcomes of this Update align with Ngāi Tahu cultural aspirations for Greater Christchurch, both Te Rūnanga o Ngāi Tahu (as a member of the Partnership) and Ngā Papatipu Rūnanga have been closely involved with the preparation of this document. Particularly significant from a cultural perspective is the need to ensure adequate provision is made for the establishment of kāinga nohoanga settlements in which Ngāi Tahu whānau can live and work on customary Māori land. The Partnership recognises the need for the future role of kāinga nohoanga developments to be important considerations in our planning and decision making processes.

In this context, this Update outlines the Partnership's planning directions for supporting urban growth in Greater Christchurch through to 2048. It highlights the key issues in terms of meeting our growth needs, and sets out the Partnership's responses to these issues, with the aim of ensuring that Greater Christchurch remains an attractive place for people to live, learn, work, visit and invest, both now and in the future.

² The Greater Christchurch Partnership has evolved to comprise Christchurch City Council, Selwyn District Council, Waimakariri District Council, Environment Canterbury, Te Rūnanga o Ngāi Tahu, Canterbury District Health Board, New Zealand Transport Agency, Regenerate Christchurch and the Greater Christchurch Group of the Department of the Prime Minister and Cabinet.

³ The medium term in this Update includes both the short (next three years) and medium term (between three and 10 years) periods defined by the National Policy Statement on Urban Development Capacity.

⁴ Having particular regard to Policy PA1 of the National Policy Statement on Urban Development Capacity.

The remainder of this document covers the following:

- Section 2, *Our Place*, provides the context in which this Update has been developed;
- Section 3, *Our Growth Needs*, outlines the anticipated housing and business demands, and the extent to which this demand is already provided for in district plans;
- Section 4, *Our Challenges*, sets out the key issues and challenges that exist when considering our planning responses;
- Section 5, *Our Plan*, identifies the planning directions and responses that we believe are required to address the key land use and infrastructure issues for Greater Christchurch;
- Section 6, *Our Next Steps*, signals further work required to implement our planning responses and support our future decision making.

Figure 1: Greater Christchurch area



Figure 1: Greater Christchurch area

2.1 Context and trends

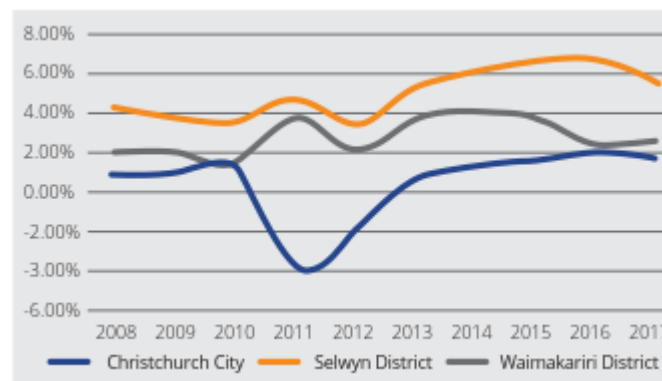
Greater Christchurch is a defined geographical area that includes and surrounds Christchurch City, New Zealand's second largest city and the largest city in the South Island (Figure 1).

Greater Christchurch currently has a population nearing half a million residents. Just under 80% of the Canterbury regional population and about 40% of the South Island population live in Greater Christchurch, emphasising its importance as a strategic regional centre and the primary economic hub of the South Island. Canterbury is the fastest growing region in New Zealand outside Auckland and more population growth is projected in Greater Christchurch over the next 30 years than other high growth cities, such as Hamilton, Tauranga, Wellington and Queenstown.

Administratively, Greater Christchurch comprises parts of three territorial authorities: Christchurch City, Selwyn District and Waimakariri District. The communities and economies in these areas are intrinsically linked environmentally by the rivers, groundwater systems, coastal and other natural features that cross territorial authority boundaries, and by infrastructure, with large numbers of people commuting to work in the City, and facilities and services provided in one district often benefitting neighbouring communities.

The larger towns in Selwyn and Waimakariri that fall within Greater Christchurch include Rolleston, Rangiora, Kaiapoi and Lincoln, while smaller settlements include West Melton, Prebbleton, Tai Tapu, Springston, Tuahiwi, Woodend and Pegasus. Lyttelton and its harbour, Whakaraupō, also fall within the defined boundaries for Greater Christchurch, although the rest of Banks Peninsula does not.

Figure 2: Annual population growth rates



The Canterbury earthquake sequence in 2010 and 2011 had a significant impact on Greater Christchurch's population and employment. As shown in Figure 2, the population in Christchurch City dropped sharply in the first two years after the earthquakes and recovered to its pre-earthquake population only in 2017. In contrast, Selwyn and Waimakariri have experienced strong population growth since the earthquakes, augmenting the high growth rates seen in the two districts prior to the earthquakes.

The widespread earthquake damage to infrastructure networks and housing areas, especially in the Central City, the eastern areas of the City and in the Kaiapoi area, required many households to find new places to live. Much of this post-earthquake demand was supported by opening new housing areas that had been planned to meet longer term growth needs. Although the development around the urban fringes of the City and the larger towns in Selwyn and Waimakariri has occurred at a faster rate than anticipated at the time the UDS was conceived, it has still been consistent with the longer term growth strategy for Greater Christchurch.

The earthquakes also damaged business premises in Greater Christchurch, especially in the central and eastern parts of the City, with many businesses forced to relocate either temporarily or, in some cases, permanently. Continued momentum behind the Central City recovery has meant businesses and workers are returning to this area, helping to

restore the central business district as the principal commercial hub for the region. Employment levels in the Central City continue to increase but are not yet back to levels that existed prior to the earthquakes.

Changes to the spatial distribution of housing and business activities in Greater Christchurch, coupled with the damage to roads and other infrastructure from the earthquakes, have had substantial impacts on the transport network. This includes altered travel patterns that have resulted in increased traffic volumes originating from the west of the City, as well as from Selwyn and Waimakariri. This has placed more demand on the road network along the western corridor, as well as on the northern and southern approaches to the Central City. Over the past decade there has been significant investment in the Greater Christchurch roading network, which has helped accommodate this demand. Investment has included the building of the Christchurch Southern Motorway Stage 1, Western Belfast Bypass and four-laning of the State Highway 1 Western Corridor (between Hornby and Belfast). The Christchurch Southern Motorway Stage 2 (between Halswell Junction Road and Rolleston), and the Christchurch Northern Corridor are under construction and expected to be fully operational by 2021.

Disruptions to land use, the transport network, and travel patterns have led to increased travel by car and contributed to reduced public transport patronage in Greater Christchurch. However, with a growing number of businesses and workers returning to the Central City, the share of trips taken by public transport in Greater Christchurch is expected to grow, while major investment in the urban cycleway network continues to encourage active transport choices.

2.2 Cultural values and aspirations

The Greater Christchurch area is an outstanding cultural landscape for Ngāi Tahu whānui. It is the hapū of Te Ngāi Tūāhuriri, Ngāti Wheke (Rāpaki) and Taumutu Rūnanga who hold mana whenua over this cultural landscape. Integral to its role as mana whenua is the inherited responsibility bestowed upon mandated individuals to act as kaitiaki, and to ensure that the principles of respect, reciprocity and sustainability are adhered to when making decisions that affect the environment in the area.

Central to the role and responsibilities of kaitiakitanga is the holistic concept known as Ki Uta Ki Tai (from the mountains to the sea). The concept of Ki Uta Ki Tai maintains that each of the constituent components of the natural environment are interconnected, and that an action in one location will have a flow on effect and impact on another location.

The concept of Ki Uta Ki Tai can apply equally to the built environment whereby decisions that we make about future urban growth will have repercussions for associated infrastructure and service requirements. Accordingly, this Update has sought to adopt an integrated and holistic approach that recognises the interconnected nature of the Greater Christchurch environment.

Contained within the Greater Christchurch cultural landscape is a mosaic of values, many of which date back to time immemorial and which serve as tangible reminders of the intergenerational relationship that Ngāi Tahu Whenua share with the natural environment. In preparing this Update, the Partnership recognizes that decisions we make about the future spatial distribution of housing and business activities in Greater Christchurch must align with traditional and contemporary cultural values. These values include:

- Wāhi ingoa (place names), which often represent people, historical events, geographical features and Natural flora and fauna;
- Ara tawhito (traditional trails), which were the arteries of important social and economic relationships;
- Ngā wai, which are the freshwater resources that are the life blood of Papatūānuku (Earth Mother) and the life giver of all things;
- Mahinga kai, which encompasses the customary (and contemporary) gathering of food and natural materials, and the places where these are gathered from;
- Mauri, which encompasses the essence that binds the physical and spiritual elements of all things together, generating and upholding life;
- Wāhi tapu and wāhi taonga sites, which includes both archaeological sites and natural features, and species that are sacred, treasured and revered by Ngāi Tahu whānui.

The key principles that govern the manner in which these values are to be managed are set out in the Mahaanui Iwi Management Plan. The Mahaanui Iwi Management Plan is an expression of kaitiakitanga and rangatiratanga, and contains detailed policies that reflect the kaupapa of Ngāi Tahu whānui in respect of the management of natural and physical resources.

Although much of the cultural landscape that encompasses the Greater Christchurch area is now highly modified, its significance to Ngāi Tahu whānui is in no way diminished. The many traditional values that attach themselves to the cultural landscape maintain a contemporary significance. To this end, the preparation of this document has been undertaken in close partnership with both Te Rūnanga o Ngāi Tahu (as a member of the Partnership) and Ngā Papatipu Rūnanga who hold mana whenua over Greater Christchurch.

It is important to record that, for Ngāi Tahu, subdivision and land use change can increase the potential for effects on sites and areas of cultural significance. These effects may be concerned with land disturbance and the introduction of activities which are inappropriate in close proximity to, or causing the displacement or loss of wāhi tapu or wāhi taonga values. In addition, intensification of the built environment may increase demand for water supply, wastewater and stormwater disposal, adversely affecting surface and groundwater resources.

2.3 Greater Christchurch Urban Development Strategy

The Urban Development Strategy (UDS) was produced by the Partnership in 2007 to provide the strategic direction for urban growth in Greater Christchurch. It promotes an integrated and intergenerational approach to planning for urban growth, and seeks to ensure that development is managed in a manner that protects environments, improves transport links, creates liveable areas and sustainably manages population growth. Formed after extensive consultation, the UDS seeks to consolidate development in and around well-defined urban and rural town centres.

The vision, principles and strategic goals in the UDS⁵ continue to guide the Partnership's approach to enabling future growth, and have helped to shape the planning directions proposed in this Update.

Vision (kaupapa)

Greater Christchurch has a vibrant inner city and suburban centres surrounded by thriving rural communities and towns, connected by efficient and sustainable infrastructure.

There is a wealth of public spaces ranging from bustling inner city streets to expansive open spaces and parks, which embrace natural systems, landscapes and heritage.

Innovative businesses are welcome and can thrive, supported by a wide range of attractive facilities and opportunities.

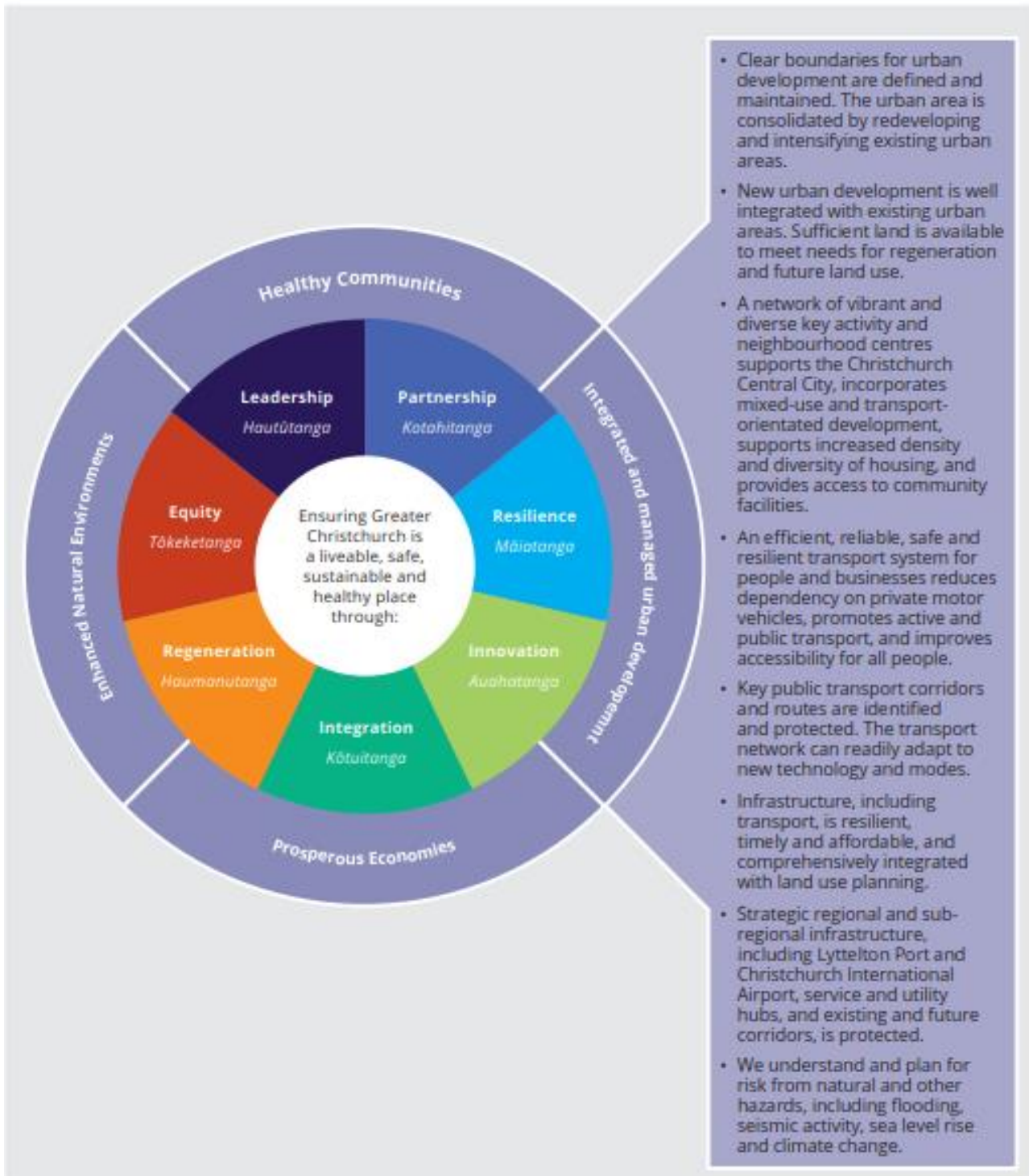
Prosperous communities can enjoy a variety of lifestyles in good health and safety, enriched by the diversity of cultures and the beautiful environment of Greater Christchurch.

⁵ An update of the UDS in 2016 retained the vision for Greater Christchurch but revised the principles and strategic goals from the 2007 UDS to reflect the changes that had occurred since the earthquakes.

Principles and strategic goals (whaingā)

The principles and strategic goals of the UDS expand on the vision by describing the key outcomes we seek to achieve under four themes: healthy communities, enhanced natural environments, prosperous economies and integrated and managed urban development. Given the emphasis of this Update on spatial planning matters, particular regard has been given to the strategic goals related to ‘integrated and managed urban development’, while also recognising the broader contribution that quality urban environments can bring to our overall quality of life.

Figure 3: UDS principles, themes and relevant strategic goals



2.4 National Policy Statement on Urban Development Capacity

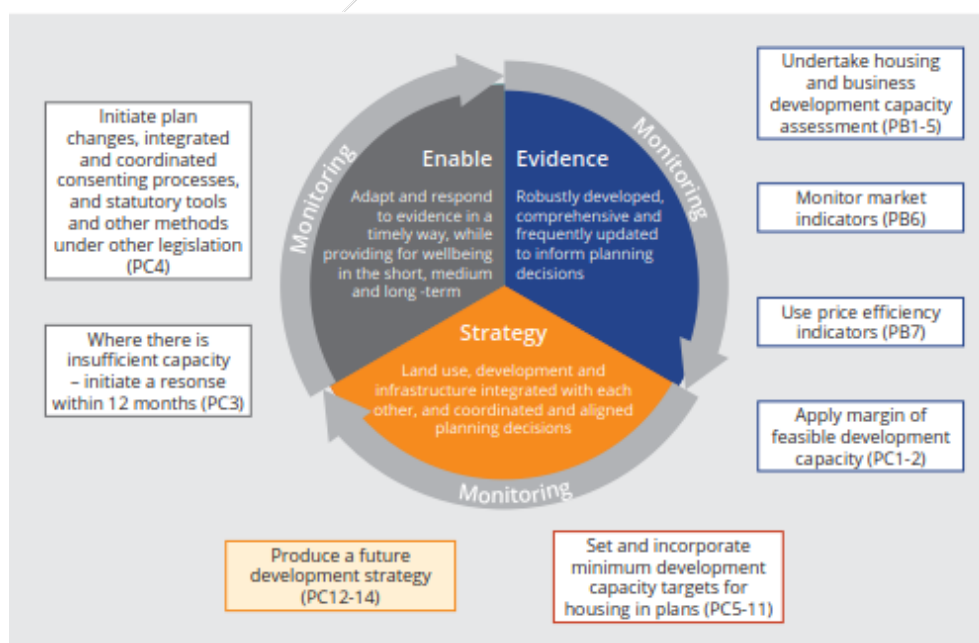
The National Policy Statement on Urban Development Capacity (NPS-UDC) came into effect in December 2016, providing direction to decision-makers under the Resource Management Act 1991 in respect of planning for urban environments. It requires all councils that have part, or all, of a medium or high growth urban area within their district or region to produce a future development strategy which demonstrates that sufficient, feasible development capacity is available to support future housing and business growth. This includes over the medium (next 10 years) and long term (10 to 30 years) periods.

The Christchurch urban area⁶ was defined by Statistics NZ in 2016 as a high growth urban area. Given the strategic planning arrangements that already exist between councils in Greater Christchurch through the Partnership, it was agreed that a review of Greater Christchurch's settlement pattern should be done collaboratively, and in doing so, meet the statutory requirements of the NPS-UDC. Accordingly, the Partnership has determined that the Greater Christchurch area shown in Figure 1 should be the geographic area of focus for the Update and the relevant urban environment for the purposes of the NPS-UDC requirements. This Update therefore meets the requirements of Policies PC12 and PC13 of the NPS-UDC (related to producing a 'future development strategy') by:

- demonstrating that there will be sufficient, feasible development capacity over the medium and long term;
- identifying the broad location, timing and sequencing of future development capacity in new urban environments and intensification opportunities within existing urban environments;
- balancing the certainty regarding the provision of future development with the need to be responsive to demand for such development;
- being informed by a Capacity Assessment, the relevant Long Term Plans and Infrastructure Strategies required under the Local Government Act 2002, and any other relevant strategies, plans and documents;
- having particular regard to NPS-UDC Policy PA1.

To inform the spatial planning decisions outlined in this Update, the Partnership has developed an evidence base that provides information about current and future housing and business trends in Greater Christchurch. This has included monitoring urban development indicators and preparing a Housing and Business Development Capacity Assessment⁷, which are both required by the NPS-UDC.

Figure 4: NPS-UDC policies and their interrelationship



⁶ The Christchurch urban area is identified by Statistics NZ as including the towns of Prebbleton in Selwyn and Kaiapoi in Waimakariri.

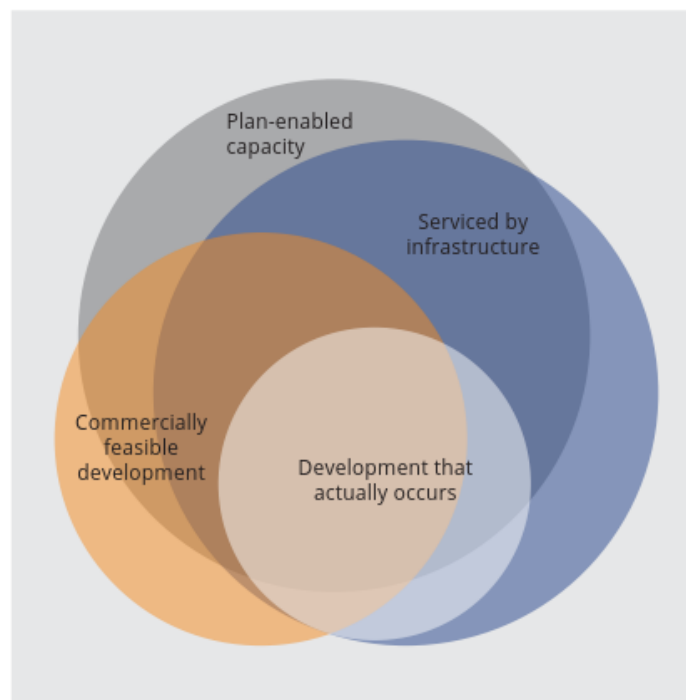
⁷ The Urban Development Indicators Monitoring Reports and Capacity Assessment produced by the Partnership can be accessed at www.greaterchristchurch.org.nz.

The Capacity Assessment estimates the demand for and supply of housing and business land to indicate whether there is sufficient, feasible development capacity currently planned in Greater Christchurch to meet our growth needs for the next 30 years.

In undertaking this work, the NPS-UDC requires councils to estimate the sufficiency of development capacity to meet future demand taking into account relevant regional and district plan provisions, actual and likely availability of development infrastructure, the current feasibility and rate of take up of capacity, and the market response in terms of what has been built, where this has occurred and at what price.⁸

This Update summarises the findings of the Capacity Assessment, identifies any sufficiency issues and provides our planning and policy response.

Figure 5: Aspects of development capacity



2.5 Where does this Update fit?

National context

This Update has been prepared within the legislative context of the Resource Management Act 1991, Local Government Act 2002 and Land Transport Management Act 2003. It has also been undertaken at a time when the Government is strengthening its approach to urban development and regional economic growth, and reviewing the mix of instruments available to effect change in New Zealand's cities. This includes a review of how local government can effectively finance infrastructure improvements to support future growth, which is a critical challenge facing most high growth urban areas.

The Urban Growth Agenda is the Government's response to the challenges confronting New Zealand's cities, especially in terms of worsening housing affordability. It seeks to address the fundamentals of land supply, development capacity and infrastructure provision by removing any undue constraints, with the initial focus of the programme on:

- enabling responsive infrastructure provision and appropriate cost allocation;
- enabling strategic planning to increase development opportunities and support quality built environments;

⁸ Requirement of Policy PB3 of the NPS-UDC.

- building stronger partnerships between local and central government as a means to undertaking pro-growth and integrated spatial planning;
- ensuring the price of transport infrastructure promotes access to the network and efficient urban form; and
- ensuring the regulatory, institutional and funding settings under the Resource Management Act, Local Government Act and Land Transport Management Act are collectively supporting the objectives of the Urban Growth Agenda.

The Government's commitment to this Urban Growth Agenda has been reinforced by the creation of a new Ministry of Housing and Urban Development. There are also important interdependencies between the Urban Growth Agenda and other Government initiatives, such as establishing a national Urban Development Authority, the Kiwibuild programme to build 100,000 affordable homes for first time buyers, the Housing First programme to house and support people who have been homeless for a long time and face multiple needs, the Public Housing Plan to increase the supply of social housing and proposed changes to the Residential Tenancies Act 1986 to improve the conditions for people renting.

The new Government Policy Statement on Land Transport (GPS) has also influenced this Update. The GPS makes clear that the transformation of the land transport system is a priority for the Government, signalling its commitment to:

- a mode neutral approach to transport planning and investment;
- incorporating technology and innovation into the design and delivery of land transport investment;
- integrating land use and transport planning and delivery.

Future updates to the GPS are likely to seek to establish local and central government agreements on transport's role in the future development of metropolitan areas such as Greater Christchurch. It will consider the role of transport as an enabler, connector and shaper of New Zealand's cities, and opportunities for investment in rapid transit options (e.g. light rail and dedicated bus routes) to support transit-oriented development in major urban areas.

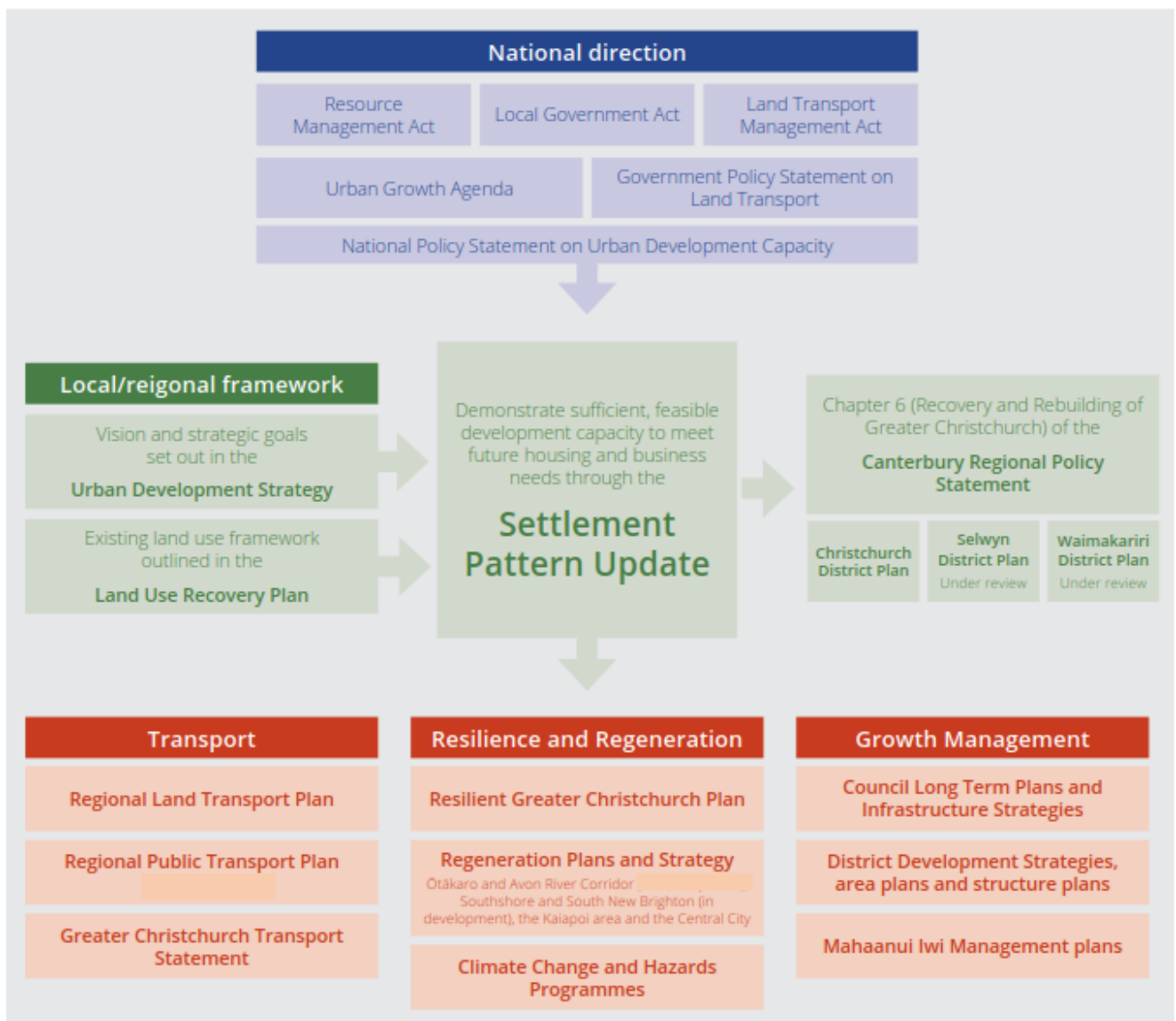
Other considerations at the national level include the emerging National Policy Statement on Versatile Land and High Class Soils and the Zero Carbon Bill, with the latter aiming to achieve net zero emissions in New Zealand by 2050.

Local and regional context

A range of plans, strategies and programmes have been developed, or are being developed, at the local and regional level that will influence how Greater Christchurch grows and changes in the future. It is important this Update aligns and integrates with these initiatives to support a cohesive approach to planning. Key considerations encompass transport plans, regeneration plans and strategies, health programmes, climate change and hazard management programmes, and other plans, strategies and programmes being delivered by councils and iwi in relation to growth management.

The implementation of some of the planning responses in this Update will also require changes to resource management documents, including to the Canterbury Regional Policy Statement and district plans for Christchurch City, Selwyn and Waimakariri. This will involve, at a minimum, the insertion of housing targets for each local authority.

Figure 6: National, regional and local context for the Settlement Pattern Update



Guidance produced by the Ministry for the Environment and the Ministry of Business, Innovation and Employment to help councils meet the evidence and monitoring policies of the NPS-UDC acknowledges that the ‘future is inherently uncertain and impossible to accurately predict, especially over the long term’.⁹

3.1 Population and household growth

The risks associated with planning for an uncertain future can be managed by utilising the most up-to-date and robust population and household projections, and considering possible growth scenarios. In this way, Statistics NZ provides three possible projection scenarios: low, medium and high growth. As shown in Figure 7, the variances in these scenarios are relatively high for the territorial authorities in Greater Christchurch, partly due to the disruptions and associated uncertainties created by the Canterbury earthquake sequence in 2010 and 2011.

Statistics NZ’s projection scenarios were considered against historic trends and local circumstances to determine the most appropriate scenario to adopt for each territorial authority, and consequently for Greater Christchurch. These provide estimates of the demand for housing (and indirectly for business land) over the medium (next 10 years) and long term (10 to 30 years).

Figure 7: Population growth scenarios for Greater Christchurch



To reflect the recent growth trends in Greater Christchurch, the Partnership agreed to adopt the medium projection for Christchurch City, and the medium-high projection for both Selwyn and Waimakariri, as the basis for the Housing and Business Development Capacity Assessment. This approach sought to balance a desire to be ‘ahead of the curve’ when planning for growth, with ensuring that the financing and provision of new infrastructure is timely to support future growth needs. It is possible, should local trends and circumstances change, that subsequent Capacity Assessments adopt different projection scenarios for Greater Christchurch.

⁹ National Policy Statement on Urban Development Capacity: Guide on Evidence and Monitoring, June 2017, p26

Based on the adopted scenario, the population in Greater Christchurch is projected to grow to about 640,000 by 2048, being 150,000 more residents than in 2018. As outlined in *Table 1*, this population growth translates to about 74,000 new households in Greater Christchurch by 2048, with 54% of this growth in Christchurch City, 28% in Selwyn and 18% in Waimakariri.

Although not specifically planned for as part of this Update, the Canterbury Regional Economic Development Strategy suggests the need for net migration in the Canterbury region to be higher than historic rates to help sustain a strong regional economy. Should new policy settings be adopted by the Government in the effort to achieve more aspirational population growth either nationally or regionally, the Partnership would need to consider the implications of an even higher growth scenario as part of future updates and reviews of the UDS.

3.2 Housing

Demand

Based on the adopted growth scenario for Greater Christchurch, projected population and household growth will generate demand for about 74,000 new dwellings over the next 30 years. When the margins (or buffers) required by the NPS-UDC are added to this housing demand, the number of new dwellings that need to be planned for in Greater Christchurch increases to almost 87,000, as set out in *Table 2*.¹⁰ These margins provide flexibility to allow for situations when developments are not brought to the market, meaning extra development capacity is required to ensure future needs are met.

Table 1: Projected Housing Demand in Greater Christchurch, 2018 – 2048

	Medium Term (2018 - 2028)	Long Term (2028 - 2048)	Total 30 Year Period
Christchurch City	14,500 (17,400)	25,200 (29,000)	39,700 (46,400)
Selwyn	7,200 (8,600)	13,500 (15,600)	20,700 (24,200)
Waimakariri	5,200 (6,300)	8,400 (9,700)	13,600 (16,000)
Greater Christchurch	26,900 (32,300)	47,100 (54,300)	74,000 (86,600)

Note: Bracketed numbers include the additional planning margins required by NPS-UDC Policies PC1 to PC4. Numbers have been rounded to the nearest 100.

A comprehensive assessment of the future housing demand profile for Greater Christchurch was commissioned as part of the Capacity Assessment¹¹, and revealed common trends likely for Christchurch City, Selwyn and Waimakariri over the next 30 years. Of significance are the projected increases in the elderly population and decreases in the average household sizes across Greater Christchurch, and the implications of these changes for the types of dwellings required to meet future needs.

While standalone homes on large sections will continue to make an important contribution towards meeting future housing demand, the shifting demographic and household profile in Greater Christchurch means a growing share of demand is expected to be met by smaller housing types, such as apartments and townhouses. Much of the growing demand for smaller housing types will be focused in the City and provided through the private rental market, while some demand for such housing types will also be evident in the larger towns in Selwyn and Waimakariri by 2048.

Due to the close location of Christchurch City, Selwyn and Waimakariri, these local housing markets share a number of similarities, for example three to four bedroom dwellings make up about two thirds of the overall housing stock for each territorial authority.¹² Although some demand for housing will be transferable between these local markets, this is not always the case given individuals and families make decisions on where they want to live based on their own needs and wants at the time of buying a house. Such factors include lifestyle, and proximity to amenities, education

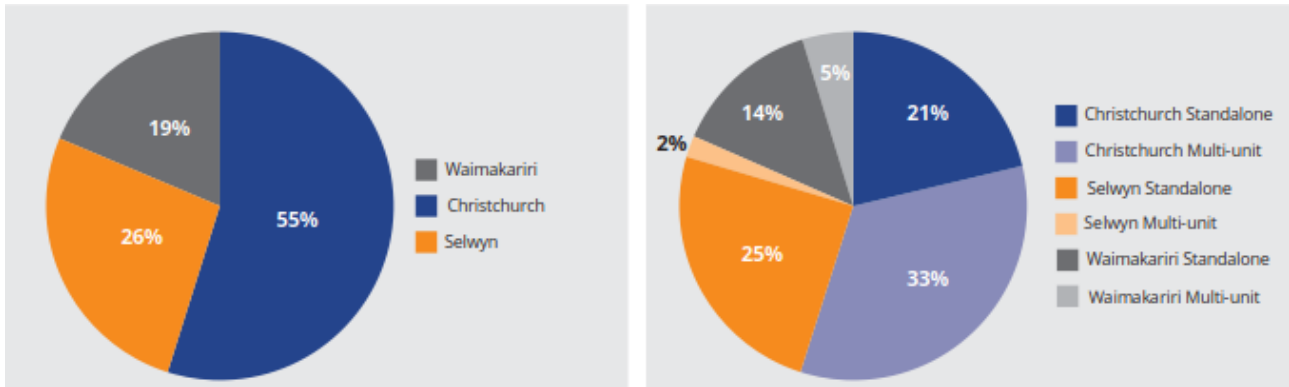
¹⁰ Margins include an additional 20% over the medium term and 15% over the long term as outlined in Policies PC1 to PC4 of the NPS-UDC.

¹¹ Livingston Associates, Housing Demand in Greater Christchurch, November 2017

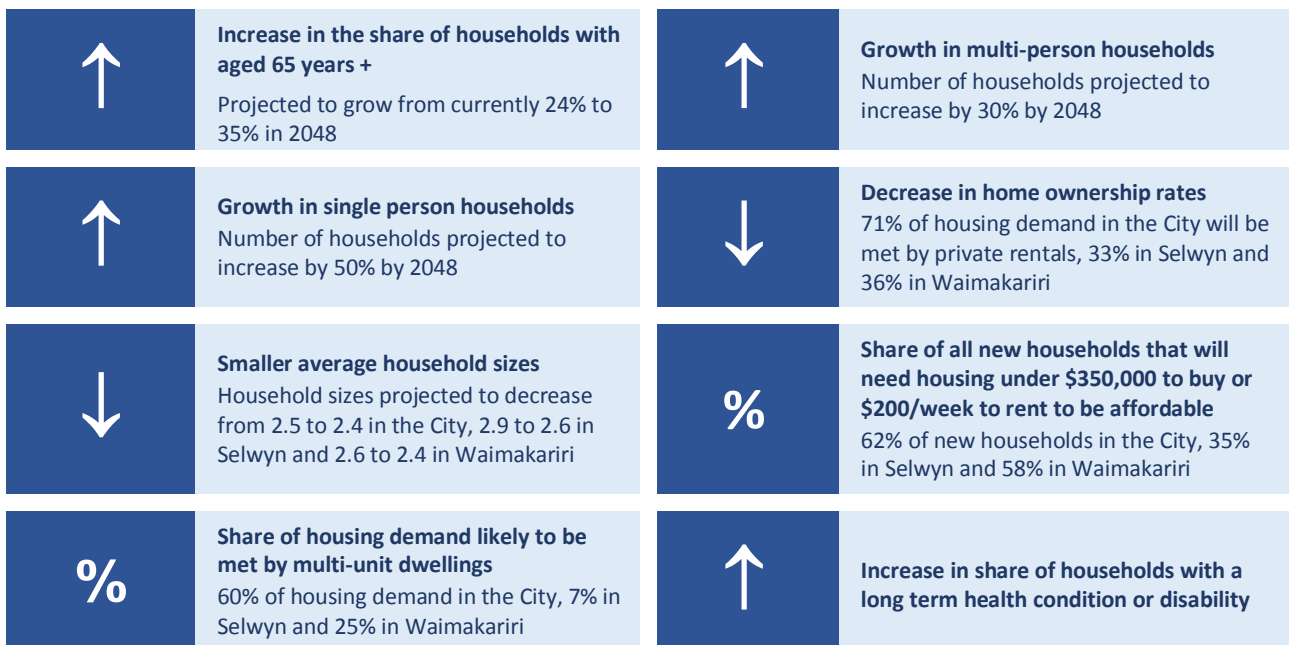
¹² Census 2013: Number of bedrooms for occupied private dwellings in Christchurch City, Selwyn and Waimakariri.

and employment. In the future, these factors are also likely to alter due to demographic changes, meaning the three housing markets will need to adapt to the changing profile of future housing demand.

Figure 8: Housing demand by Council area and housing type across Greater Christchurch



What key factors will influence our future and changing housing demand profile?



Targets

The NPS-UDC directs councils to set minimum targets for housing development capacity for both the medium and long term periods. These targets are informed by the projected demands for housing identified in the Capacity Assessment. Through this Update, Councils need to demonstrate how sufficient, feasible development capacity will be provided and serviced to accommodate the number of new dwellings planned for each territorial authority over these periods and set out how these targets will be met.

Having considered the most appropriate housing targets for Greater Christchurch, the Partnership believes that targets that simply duplicate the projected demands for each territorial authority would not take account of our unique post-earthquake circumstances, and over the longer term, may not align with the strategic goals of the UDS to increasingly support growth by redeveloping and intensifying existing urban areas.

However, the development trends that currently characterise Greater Christchurch will also not change overnight, with the market and people's preferences needing time to respond to the new opportunities being created by

regeneration and place-making initiatives underway in the Central City, suburban centres and surrounding local neighbourhoods in Christchurch City.

The targets for housing development capacity therefore represent a transitional approach that align with projected demands over the medium term, but allow for a greater share of new households in Greater Christchurch to be supported through redevelopment in the City over the long term.¹³ The regional targets for Greater Christchurch correspond to projected demand, it is only the territorial authority apportionment of these targets over the long term that represents a transitional approach.

In this context, the targets set out in Table 2 for Christchurch City, Selwyn and Waimakariri represent the development capacity that each council will, over the medium term, zone and otherwise, enable through their relevant planning processes and mechanisms (district plans, structure plans, outline development plans and infrastructure strategies) and over the long term, identify in relevant plans and strategies, to meet the demand for housing in Greater Christchurch over the medium and long term.¹⁴ A change to the Canterbury Regional Policy Statement in 2019 will include a policy that will enable land required to meet an identified medium term capacity need to be rezoned in district plans. Unless already enabled, additional development capacity required over the long term will only be shown on Map A of the Regional Policy Statement as a Future Development Area, identified in relevant plans and strategies, and the development infrastructure¹⁵ required to service it will be identified in each council’s infrastructure strategy.

These targets will need to be revisited every 3 years following the completion of scheduled Capacity Assessments.

Table 2: Targets for Housing Development Capacity in Greater Christchurch, 2018 - 2048

	Medium Term (2018 - 2028)	Long Term (2028 - 2048)	Total 30 Year Period
Christchurch City	17,400 (54%)	38,550 (71%)	55,950 (65%)
Selwyn	8,600 (27%)	8,690 (16%)	17,290 (20%)
Waimakariri	6,300 (19%)	7,060 (13%)	13,360 (15%)
Greater Christchurch	32,300	54,300	86,600

Note: Figures included in the table represent number of dwellings. Bracketed figures represent the share of dwellings for that period.

Sufficiency

Collectively, the district plans for Christchurch City, Selwyn and Waimakariri already allow for a substantial number of new dwellings to be built in and around their urban areas. This development capacity is provided through greenfield housing areas (new subdivisions) and the redevelopment of existing housing areas. Some additional capacity also exists in rural locations surrounding the main towns in Selwyn and Waimakariri. Most of the capacity in Greater Christchurch is currently provided in the City, with only about 13% provided in Selwyn and 6% in Waimakariri.

The Capacity Assessment included extensive work to assess the commercial feasibility of housing development capacity in Greater Christchurch. This work highlighted that assessing feasibility can be extremely complex and that further work is required to better understand and then respond to the challenges of improving feasibility, especially in relation to the redevelopment market. Key areas for further investigation include understanding the influences on and of land values, sales prices and build and land development costs, and how these factors could change over time to improve the relative feasibility of housing developments.

¹³ The longer term share of new households to be provided within Christchurch City reflects those outlined in the UDS 2007.

¹⁴ Table 2 will be inserted into the Canterbury Regional Policy Statement in Chapter 6 (Recovery and Rebuilding of Greater Christchurch). Relevant local authority targets will also be inserted into the district plans for Christchurch City, Selwyn and Waimakariri.

¹⁵ Development infrastructure means network infrastructure for water supply, wastewater, stormwater, and land transport as defined in the Land Transport Management Act 2003, to the extent that it is controlled by local authorities, and including New Zealand Transport Agency.

In this context, the feasibility tests undertaken as part of the Capacity Assessment produced a wide range of results for Christchurch City, Selwyn and Waimakariri depending on the adopted set of assumptions and inputs. Further work to improve the modelling tools used for Capacity Assessment findings will occur as part of the next assessment in 2020.

Based on the housing targets, the overall amount of feasible housing development capacity in Greater Christchurch is sufficient to meet demand over the medium term. However there is insufficient development capacity in certain locations within Greater Christchurch in the medium term and overall when you consider the long term housing demand.

At the territorial authority level, given the range of reported feasibility, capacity in Selwyn and Waimakariri may not be sufficient to meet demand over the medium term, while the significant capacity in the City is expected to be sufficient over the next 30 years, even with a higher share of growth apportioned to the City over the long term period (see Table 3).

These projected shortfalls in housing development capacity must be resolved to enable our urban areas to develop and change, and respond to the needs of both current and future generations. How the Partnership will respond to the projected capacity shortfalls in Greater Christchurch is addressed in Sections 5 and 6.

Table 3: Sufficiency of Housing Development Capacity in Greater Christchurch against Housing Targets, 2018 - 2048

	Housing Development Capacity	Housing Target	Sufficiency of Housing Development Capacity	
			Medium Term (2018 - 2028)	Medium and Long Term (2018 - 2048)
Christchurch City	59,950 *	55,950	+ 38,875	+ 4,000
Selwyn	9,725 **	17,290	+1,825 ***	-5,475 ***
Waimakariri	4,200 **	13,360	-1,600 ***	-7,675 ***
Greater Christchurch	73,875	86,600	+39,100 ***	-9,150

Note: Capacity figures included in the table represent number of dwellings (numbers have been rounded to the nearest 25).

In the medium term, capacity for around 3,500 dwellings in Christchurch is constrained by the provision of necessary infrastructure.

Sufficiency of housing development capacity will be reviewed and published as further feasibility modelling and investigation is completed.

These housing targets include the additional capacity margins required by the NPS-UDC as shown in Table 1.

** Alternative modelled scenarios documented in the Capacity Assessment, which are based on less favourable assumptions, identified development capacity for approximately 52,675 or 36,400 dwellings.*

*** These capacity figures are derived from a qualitative assessment of greenfield land only. An alternative modelled scenario, including existing zoned land and incorporating changes in prices and costs over time, identified development capacity for the long term of approximately 9,200 dwellings in Selwyn and 6,100 dwellings in Waimakariri.*

**** These sufficiency figures have been adjusted to discount the demand over the medium and long term likely to be met through uptake of development in rural zoned areas (averaging 70 dwellings/year for Selwyn and 50 dwellings/year for Waimakariri). Demand met through capacity in rural areas will be reviewed following the review of rural zoning as part of respective District Plan Reviews in Selwyn and Waimakariri.*

Further and ongoing refinement of the feasibility tools will be undertaken by constituent partner councils and incorporated as part of the next capacity assessment due in 2020. This assessment will also benefit from more up-to-date data and can be used as the basis for making any zoning changes to address development capacity shortfalls as part of the District Plan Reviews for Selwyn and Waimakariri.

3.3 Business

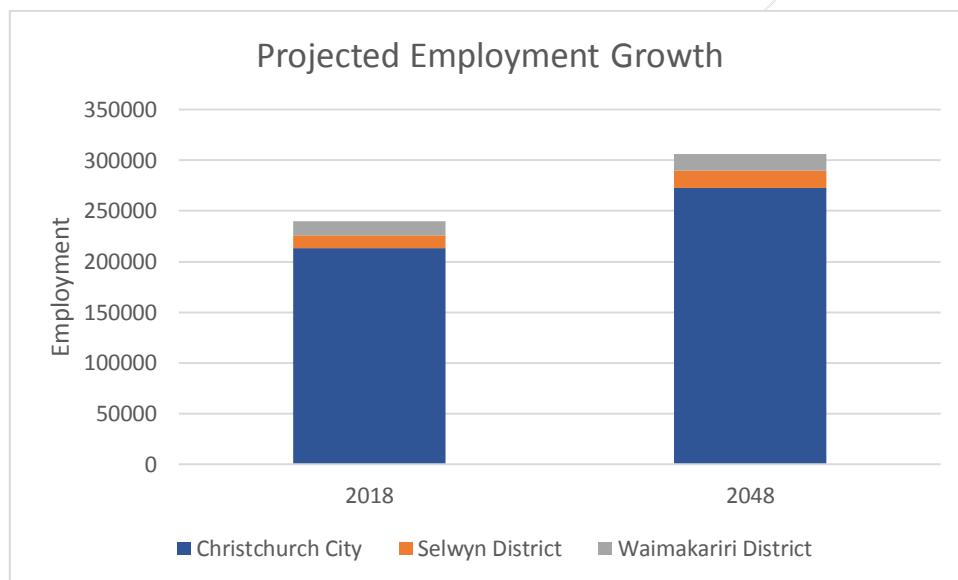
Demand

Significant business growth is projected in Greater Christchurch over the next 30 years. This increase is driven predominantly by population and household growth and consequently the highest growth sectors are those providing retail goods (contributing 17% of employment growth), health/education (contributing 42% of growth) and services (19% of growth)¹⁶. Given the strong population growth driver, the structure and quantum of employment growth projected by the Capacity Assessment could be different if the population growth projected by Statistics NZ does not eventuate.

The tourism sector is also expected to contribute to a significant proportion of the growth over the period (accommodation contributing 16% of growth) whilst employment in the primary and industrial sectors is expected to remain relatively stable, contrasting with historic negative trends observed for these sectors.

In total, an additional 67,000 employment opportunities are projected by 2048, with most of these located within Christchurch City (89%) and creating additional demands for land and floorspace.

Figure 9: Projected employment growth



¹⁶ Greater Christchurch Housing and Business Capacity Assessment (2018)

Sufficiency

The Christchurch City, Selwyn and Waimakariri district plans already make generous provision for meeting the long term needs for industrial land, and future commercial space is also mostly provided for, at least over the medium term.¹⁷ Over the longer term, the Capacity Assessment identifies potential shortfalls in commercial space, notably in areas projected to experience significant residential growth, including the Central City, the south-west and north-west parts of the City, and the main centres in Selwyn and Waimakariri.

The sufficiency of industrial and commercial development capacity to meet projected demand is shown in Table 4.

Table 4: Sufficiency of Industrial and Commercial Development Capacity in Greater Christchurch, 2018 – 2048

	Sufficiency of Industrial Development Capacity		Sufficiency of Commercial Development Capacity	
	Medium Term (2018 - 2028)	Medium and Long Term (2018 - 2048)	Medium Term (2018 - 2028)	Medium and Long Term (2018 - 2048)
Christchurch City	+ 665	+ 200	+ 30	- 135
Selwyn	+ 205 to + 230	+ 190 to + 220	- 5 to + 5	- 20 to - 10
Waimakariri	+ 60 to + 110	+ 45 to + 95	- 5 to + 15	- 5 to + 010
Greater Christchurch	+ 930 to + 1,010	+ 420 to + 505	+ 30 to + 60	- 165 to - 140

Note: Figures included in the table represent land in hectares (rounded to the nearest 5 hectares from the Capacity Assessment). Ranges reflect the uncertainty that additional demand for business land and floorspace can be accommodated by under-utilised business land. Commercial development capacity includes both commercial office land and commercial retail land.

Business land is inherently more flexible than housing land, with a wide range of business uses enabled on most business sites. As a consequence, the Capacity Assessment identified that most industrial and commercial zoned land in Greater Christchurch was commercially feasible for at least one type of business use. Given that longer term demands for business space can be affected by a wide range of factors, regular monitoring and review of uptake and other market indicators, as well as sensitivity testing of modelled assumptions, will be important to confirm actual levels of demand and ensure appropriate planning responses are made at the necessary times.

¹⁷ Reference to commercial space includes both commercial office space and commercial retail space.

4.1 Key growth issues for Greater Christchurch

Arising from the context outlined in Section 2 and the evidence base from the Capacity Assessment summarised in Section 3, the Partnership recognises that there are some key issues that need to be considered as part of our planning directions and responses. These key issues for Greater Christchurch are discussed below.

Delivering new dwellings through redevelopment and intensification

Delivering higher density housing is essential to supporting the needs and preferences of a growing share of the population, and for achieving the consolidated urban form that most effectively accommodates growth. Although the uptake of redevelopment opportunities in Greater Christchurch is not yet back to pre-earthquake levels, the scale of redevelopment has started to trend upwards and is getting close to the intensification targets set in the UDS and Chapter 6 of the Canterbury Regional Policy Statement. To unlock further redevelopment opportunities, the new Christchurch District Plan has 'up-zoned' areas to allow for medium and high density housing redevelopments, and streamlined consenting approval processes. However, there are challenges to delivering redevelopment in Greater Christchurch requiring the development sector to be appropriately supported to help bring such developments to the market and ensure the rate of new dwellings delivered through intensification strengthens.

Meeting housing needs and preferences for current and future residents

In comparison to other New Zealand cities, the cost of housing in Greater Christchurch is relatively affordable, however the provision of social and affordable housing will become an increasingly critical issue. Enabling higher density housing developments at different price points will be vital to meeting the projected increase in demand for smaller, more affordable dwellings. District plan provisions play an important role in helping to deliver a broad range of housing types, while other targeted programmes by constituent partner councils aim to support the development sector in delivering higher density housing to the market. Public sector investment can also play a role in boosting the attraction of areas for such developments, especially in the Central City, key activity centres and district town centres.

Recognising post-earthquake trends and anticipating future drivers

Since the earthquakes in 2010 and 2011, the location and pace of housing and population growth have been different to that anticipated at the time the UDS was produced in 2007. The increasing uptake of redevelopment in Christchurch City during the 2000s has since slowed, while development of greenfield land enabled by the Land Use Recovery Plan (LURP) has been advanced rapidly. These trends partly reflect the unique situation in which a significant number of households had to be urgently reaccommodated following the earthquakes. A key challenge is therefore to understand whether the demands driving these trends will continue in the future or shift back to pre-earthquake trends, and whether any policy intervention will be required. This highlights the importance of both monitoring, to understand any key changes, and the role of planning and policy directions in this Update to enable the market to meet future demands.

Integrating land use and transport planning to shape desired urban form

Integrated land use and transport planning is a key principle that underpins the strategic direction for urban growth in Greater Christchurch. However, the key challenge of achieving sufficient and equitable infrastructure funding remains. In this context, the Government Policy Statement on Land Transport (GPS) has offered new opportunities for investing in our transport system, with the possible development of a local and central government agreement on transport's role in the future development of Greater Christchurch signaled in the GPS. Discussions with the Government and infrastructure providers will be important in delivering the types of improvements to our transport network that will help enable our desired urban form. Aligning development with good access to a range of transport modes will reduce the reliance on private vehicles, and provide associated social, environmental and economic benefits for all people and communities.

Living with, and mitigating climate change impacts

The way we plan Greater Christchurch has a big impact on how we use and consume resources, including those that have an impact on climate change, and also how we respond to effects associated with climate change. Providing opportunities for modal shift to active forms of transport, increased uptake of public transport, reducing trip distances, and promoting new non-fuel burning transport technologies all minimise the impact the residents have in terms of their contribution to greenhouse gas emissions. How we enable carbon offsetting activities to work towards zero net carbon emissions also needs to be a consideration in our planning frameworks. Planning for development in the right places ensures that as a wider community, the adverse effects from the impacts of climate change can be appropriately avoided or mitigated, and potentially lead to long term resilience and security for food production. This includes making the right choices that take into account sea-level rise, as well as changing weather patterns and their contribution to severe weather events, including flooding and drought, so that future generations do not bear the cost of our decision-making.

Valuing the relationship between our urban areas and the environment

Greater Christchurch's settlement pattern principles from the UDS promote a sustainable urban form that protects our natural environment, rural character and versatile soils. They also align with the Ngāi Tahu value of kaitiakitanga, and recognise the mauri of waterways and cultural landscapes. Where new greenfield development will be required to help meet our future needs, there are constraints as to where development can and should occur across Greater Christchurch. Coastal and flood hazards areas, groundwater aquifers, outstanding natural landscapes, versatile soils and airport noise contours all create limitations on where new development can be located. Figure 10 outlines some of these relevant constraints (some data layers are currently being refined as part of District Plan Reviews). Other constraints exist but some can and have been mitigated ahead of development occurring, such as ground improvements in areas with geotechnical constraints or requiring raised floor levels in areas with lower flood risk. In this context, it is important to ensure that our plan for growth recognises that the vitality of our urban areas is intrinsically linked to that of our environment, and that our urban areas need to be increasingly resilient to changes in our natural environment and better integrate natural systems within the urban landscape.¹⁸

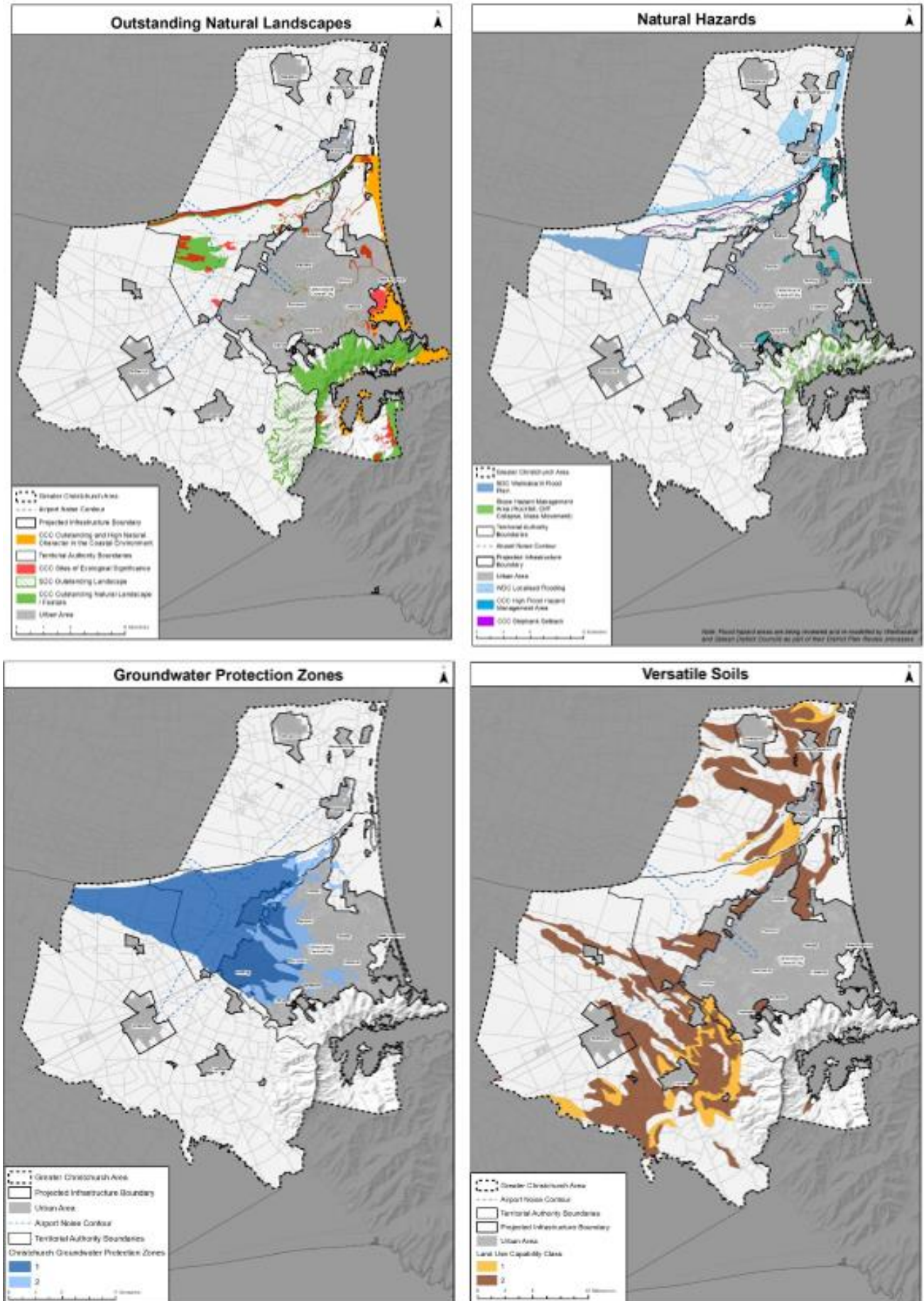
Fostering an equitable planning approach across our communities

Although the focus of this Update is to demonstrate sufficient development capacity for growth, the wider strategic goals of the UDS will not be realised without considering the needs of more disadvantaged areas and communities. One key element of Christchurch City Council and Regenerate Christchurch's work programme is supporting regeneration in eastern Christchurch, with the post-earthquake movements of people and businesses westward heightening some pre-existing disparities. Targeted place-making investments by the public sector can give confidence to private sector housing redevelopment which typically favours more affluent neighbourhoods, driven by the more attractive returns from higher sales prices.

Underlying all these challenges will be how Greater Christchurch responds to known or potential shocks and stresses to the economy, society and our environment. For example, understanding, preparing, mitigating and adapting to climate change is a central part of the Partnership's *Resilient Greater Christchurch* plan. Furthermore, global financial fluctuations and the pervasive impact of new technology can fundamentally change growth projections, labour force requirements and how we function as a society. This Update is conscious of the role settlement planning can contribute to a more sustainable and resilient future but recognises that, to be effective, change needs to be a shared responsibility across all sectors and appropriately supported nationally and internationally.

¹⁸ The Resilient Greater Christchurch Plan sets out how Greater Christchurch can be stronger, smarter and more resilient to the physical, social and economic challenges that are a growing part of the 21st century. It can be accessed at <http://greaterchristchurch.org.nz/projects/resilient-greater-christchurch/>

Figure 10: Example constraints on development across Greater Christchurch



4.2 Priorities for this Update

This Update focuses on those key strategic planning directions that need to be undertaken collaboratively through the Partnership to address the land use and infrastructure issues identified in the Capacity Assessment. It recognises that providing development capacity is not just about land supply so also considers other more detailed planning and policy actions that will need to be implemented to realise our broader growth aspirations.

The priority areas for the Update include:

- Achieving the desired urban form and principles of the UDS, and the coordinated planning and decision-making required under the NPS-UDC, and addressing:
 - Projected shortfalls of housing development capacity in Selwyn and Waimakariri;
 - Projected shortfalls of commercial development capacity across Greater Christchurch;
- Unlocking redevelopment opportunities across Greater Christchurch, but especially in the central city, key activity centres, district town centres and along core transport corridors;
- Ensuring that future housing provides a range of dwelling types to meet the changing demand profile in Greater Christchurch, including the projected higher demand for smaller, more affordable units, and the future demand of Ngāi Tahu whānau to establish kāinga nohoanga settlements on their ancestral land;
- Integrating land use and transport planning to ensure future urban growth is effectively and efficiently supported by the transport network, including delivering a significantly enhanced public transport system;
- Ensuring public and private investments support the desired pattern of urban growth.

Our response to these priorities for Greater Christchurch is described in Section 5, Our Plan. Further actions to be undertaken by constituent partners following this Update are set out in Section 6, Our Next Steps, recognising that although the long term is addressed in this Update, additional work is required to ensure our planning directions for the longer term are appropriately investigated and implemented, and effectively respond to emerging drivers of change for Greater Christchurch.

5.1 Greater Christchurch's settlement pattern

The Partnership's plan for supporting urban growth over the next 30 years is strongly guided by the vision and strategic goals from the UDS, and the extensive planning framework that has already been developed for Greater Christchurch to support long term growth. It focuses on responding to the priorities detailed in Section 4, Our Challenges, and seeks to provide greater certainty over the medium term (next 10 years) than the long term (10 to 30 years). This will allow the Partnership to further consider the most appropriate planning directions and responses to our longer term issues.

Our plan aims to maintain the UDS principle of consolidating urban development in and around Christchurch City, and the larger towns in Selwyn and Waimakariri. It balances the strong demand for housing in towns outside the City with the anticipated return to stronger levels of demand for higher density housing in the City. To deliver new housing of the right type and location to meet demand, both now and in the future, it is important that a suitable range of greenfield and redevelopment opportunities are provided to the market.

This takes into account the need to provide for efficient movement of people and goods, so that transport efficiency is optimised. This in turn will have an impact on Christchurch's overall contribution to greenhouse gas emissions and the efficient use of energy resources. The impact of having a compact urban form increases the ability to contribute to the uptake of public transport opportunities, as well as reduced trip distances that enable active modes of transport. Choices also need to be made to ensure that development takes place in the right places, so that we contribute to intergenerational equity and ensure that our future generations inherit as city that functions efficiently and is resilient to future impacts from climate change and resource scarcity.

In this context, the Partnership identifies that, by setting the housing targets shown in section 3.2, 65% of Greater Christchurch's housing growth through to 2048 should be supported in Christchurch City, with the remaining 20% in Selwyn and 15% in Waimakariri.

This settlement pattern approach features a slightly lower share of growth in the City than envisaged by the UDS, with the higher share in the districts a reflection of the strong housing demand that has characterised these areas. Our plan seeks to ensure that sufficient housing capacity is provided in both Selwyn and Waimakariri to enable growth in district towns, while also transitioning to more growth being provided through redevelopment in the City over the longer term.

To implement this plan, the Partnership considers that some new greenfield housing areas should be released or otherwise identified in Rolleston, Rangiora and Kaiapoi to help address projected housing capacity shortfalls for Selwyn and Waimakariri over the medium to long term. The location of these greenfield areas is consistent with the long term growth strategy from the UDS. Increasing take up of redevelopment opportunities will also be essential to achieve the housing targets for the City and realise the consolidated urban form aspirations for Greater Christchurch. Christchurch City Council is developing programmes to support redevelopment in the City, with the initial focus on the Central City.

Our plan for supporting business growth over the next 30 years is to focus on boosting the self-sufficiency of growing areas and respond to the needs of different commercial and industrial sectors.

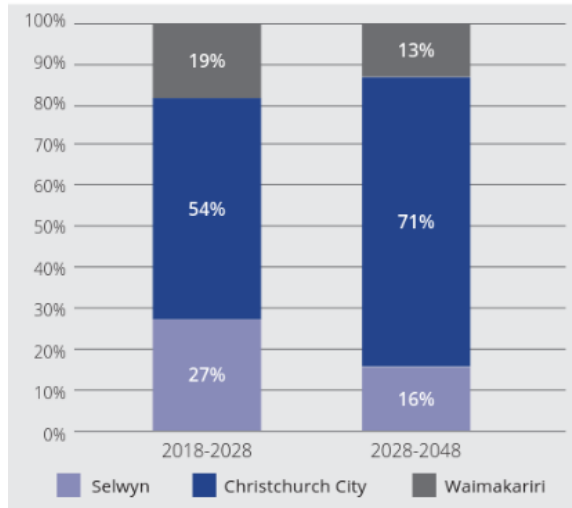
While industrial space requirements are already well catered for in Greater Christchurch, new commercial space is required to support the needs of our growing population. The Partnership will continue to focus commercial developments predominately in the Central City, reinforcing it as the principal commercial hub of the Canterbury region, while also supporting developments in key activity centres, town centres and neighbourhood centres as part of supporting thriving local communities. Opportunities to facilitate redevelopment of brownfield land will continue to be investigated.¹⁹

¹⁹ Brownfield land refers to abandoned or underutilised business land with potential for redevelopment.

Underpinning this settlement pattern approach is the vision for a transformation of the transport network that fosters much greater public and active transport usage, and reduced reliance on the private vehicle.

Achieving this vision will require commitment from the Government to invest in the necessary improvements to our transport system, which could include investing in rapid transit services, recognising the key role of transport in shaping urban form and creating liveable urban areas.

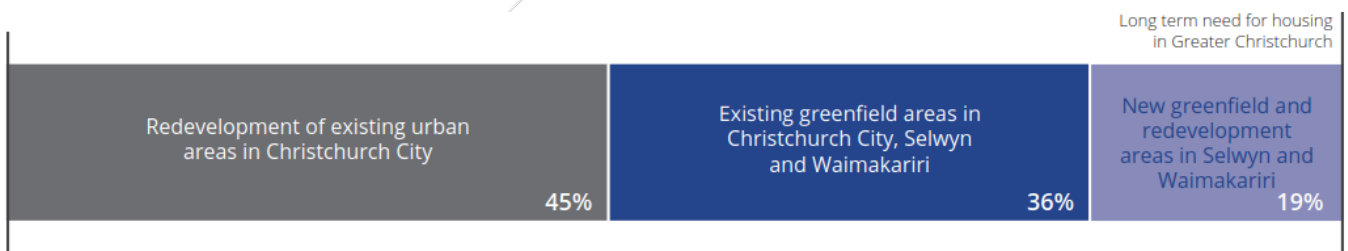
Figure 11: Where will housing growth be located?



How will the range of housing needs be met?

As well as providing for overall projected household growth this Update encourages a balance between new housing enabled through redevelopment opportunities within existing urban areas and development capacity, in greenfield locations in Christchurch, Selwyn and Waimakariri Districts. The approximate breakdown between these different locations for the period 2018 to 2048 is shown in Figure 12.

Figure 12: Meeting housing demand through redevelopment and in greenfield locations

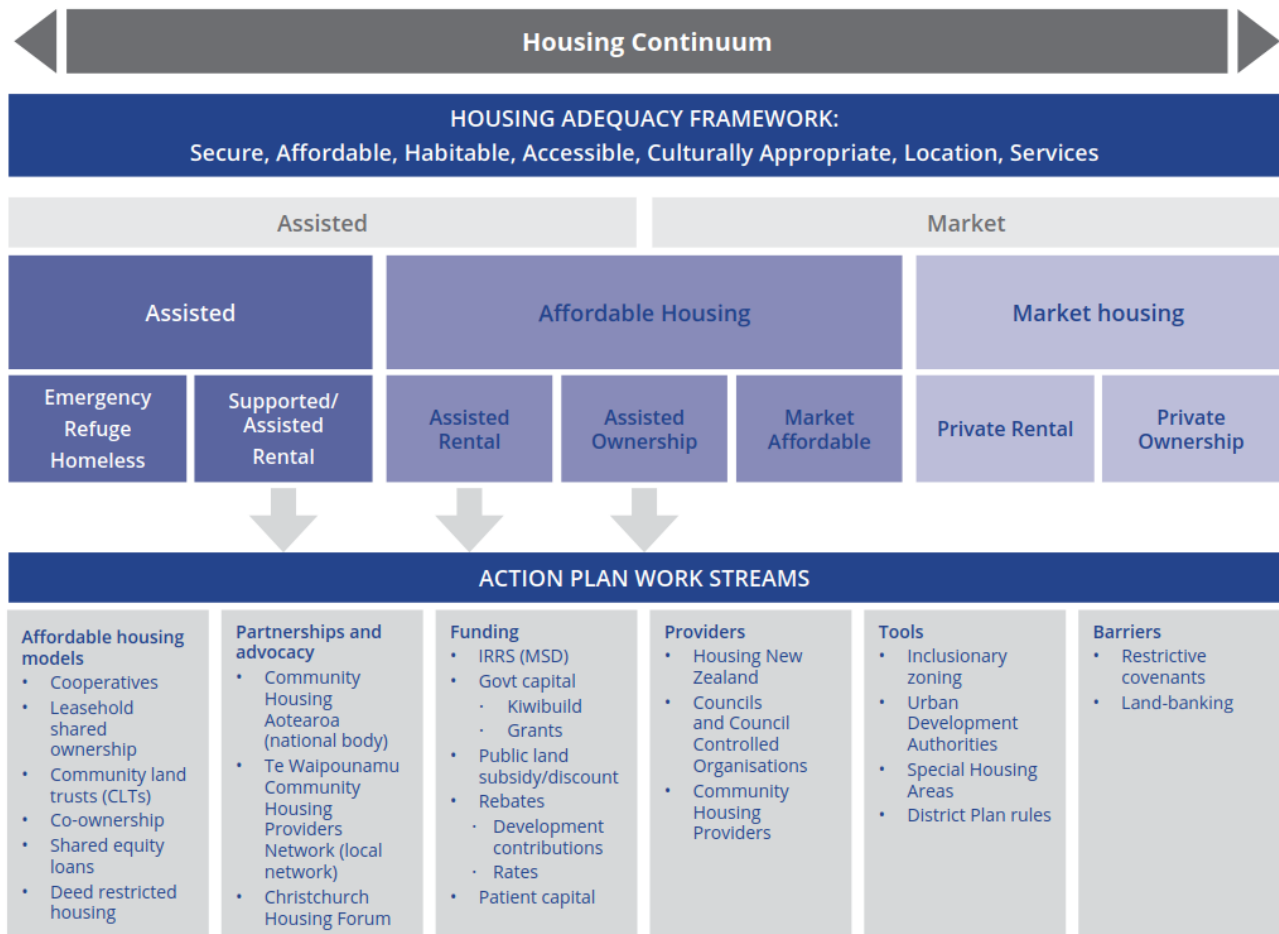


How will we address housing affordability challenges?

Housing need relates to more than just ensuring our district plans provide sufficient development capacity. As outlined in Section 3, *Our Needs*, and Section 4, *Our Challenges*, an increasing number of households will face affordability pressures in either renting or owning their home.

Many of the potential initiatives to provide affordable housing choices across a housing continuum will need to be advanced outside of the land use focus of this Update. The Partnership is however committed to working collaboratively to develop an action plan and establish partnerships to enable social and affordable housing provision across Greater Christchurch.

Figure 13: Potential components of a social and affordable housing action plan for Greater Christchurch



What will urban growth look like in different areas of Greater Christchurch?

CHRISTCHURCH CITY	Central City	Continued investment in the central city significantly advances its regeneration and renewal, and improves its attraction as a vibrant and thriving Central City area. Its vitality as the main commercial hub for Greater Christchurch and the Canterbury region is bolstered by the completion of anchor projects and public realm improvements. Older industrial areas located in and around the central city are available to transition to meet demand for retail and office space, while commercial areas are remodelled and used more efficiently to maximise floorspace. New residential developments that enable 20,000 people to live in the central city are facilitated by a comprehensive programme of support.
	Key Activity Centres	New residential and commercial opportunities become available in and around the key activity centres in Papanui, Shirley, Linwood, New Brighton, Belfast/Northwood, Riccarton, North Halswell, Spreydon and Hornby, meeting the demands arising from the growing population. Brownfield sites are increasingly redeveloped to support new land uses linked to the surrounding neighbourhoods.
SELWYN	Suburbs and Outer Urban Areas	The wellbeing and resilience of communities in the eastern suburbs are greatly improved as a result of major regeneration projects, including the restoration, enhancement and development of the Ōtākaro Avon River Corridor. New communities become established in the northern and southwestern parts of the City, especially in and around the Halswell area. Industrial developments are mainly taken up along core freight routes to Lyttelton Port, Christchurch Airport and the rest of the South Island.
	Rolleston and Lincoln	Rolleston continues to grow as the principal centre in Selwyn, with a range of new developments supporting a vibrant town centre and the choice of housing broadening to reflect the changing demand profile of the growing town. Industrial and large format retail expand around the I-Zone Southern Business Hub, benefitting from improved connections across State Highway 1. Lincoln develops while retaining its village and university character, with opportunities emerging from new academic and business partnerships through the Lincoln Hub initiative.
WAIMAKARIRI	Rangiora and Kaiapoi	Rangiora remains the principal centre in Waimakariri, continuing its town centre rejuvenation and expanding mostly eastwards to support household growth. Greenfield developments are balanced with opportunities to redevelop some of the town's older housing stock. New commercial space integrates with the existing town centre, while new industrial developments are focused in the Southbrook area. Mixed use business areas identified through regeneration planning integrate with a growing town centre in Kaiapoi, with new housing supported by extending the town to the north. New housing and business developments in Ravenswood enables growth and better connections between Woodend and Pegasus.
	Customary Maori Lands	Kāinga nohoanga settlements on customary Māori land build stronger Ngāi Tahu networks and relationships, enabling more Ngāi Tahu whānau to live in more traditional housing arrangements, including clusters of housing with a range of housing types, linked to marae, social and community facilities and locally appropriate customary employment activities.

5.2 Christchurch City

By 2048, over half a million people will call Christchurch City home, and the City will provide over 85% of the employment opportunities in Greater Christchurch. The Christchurch District Plan, supported by the Christchurch City Council's Long Term Plan, provides substantial opportunities to redevelop and intensify existing urban areas to meet both housing and business needs. This includes in and around the Central City, key activity centres, larger neighbourhood centres and nodes located along core public transport corridors.

The Council is developing programmes to support investment and housing redevelopment, with the initial focus on the Central City. A Central City Action Plan developed together with those who already live and do business in the Central City, provides support over the next two to three years as anchor projects and major attractions are being completed and opened. Another priority action of the Council is the Central City Residential Programme which aims to increase the residential population of the Central City from 6,000 in 2018 to 20,000 in 2028. More people means more activity and more spending which will build confidence in Christchurch's city centre. This in turn will stimulate new investment, attract residents and deliver on the city's post-earthquake potential. The Programme is a long term commitment to achieve six overall goals:

- More people - More people choose to live within the Central City;
- Housing choice - There is housing choice that meets the diverse needs of a wide range of households;
- Liveable neighbourhoods - Central City neighbourhoods are rated highly liveable by their residents.
- Encourage delivery - The risks of development are reduced, feasibility is improved;
- Support delivery - Effective support and advice is provided to and used by Central City housing developers;
- Accelerate delivery - Delivery of Central City housing is accelerated and sustained.

Priority actions have been identified for the first three years of the Programme. These actions will put in place the processes, tools and mechanisms to increase and sustain housing delivery for the full 10 years of the Programme, and identify the early, high-potential opportunities to increase housing delivery. The geographical focus for the Programme is the Central City, however it is expected that key programme learnings and initiatives will apply to other Key Activity Centres and along transport corridors targeted for medium density development. A focus of the Council will be working with developers and local communities to support new development that is both commercially viable and of a quality to achieve high standards of liveability.

The new greenfield areas zoned in the District Plan have been carefully chosen to avoid and protect areas of value, such as the Port Hills, the protection of our drinking water sources from unconfined aquifers, efficient operation of our airport (noise contours), preservation of productive rural land and avoidance of risk from natural hazards.

A further focus of the Council will be to advance appropriate elements of the social and affordable housing action plan outlined in *Section 5.1*, through partnership with central government, housing developers and community housing providers.

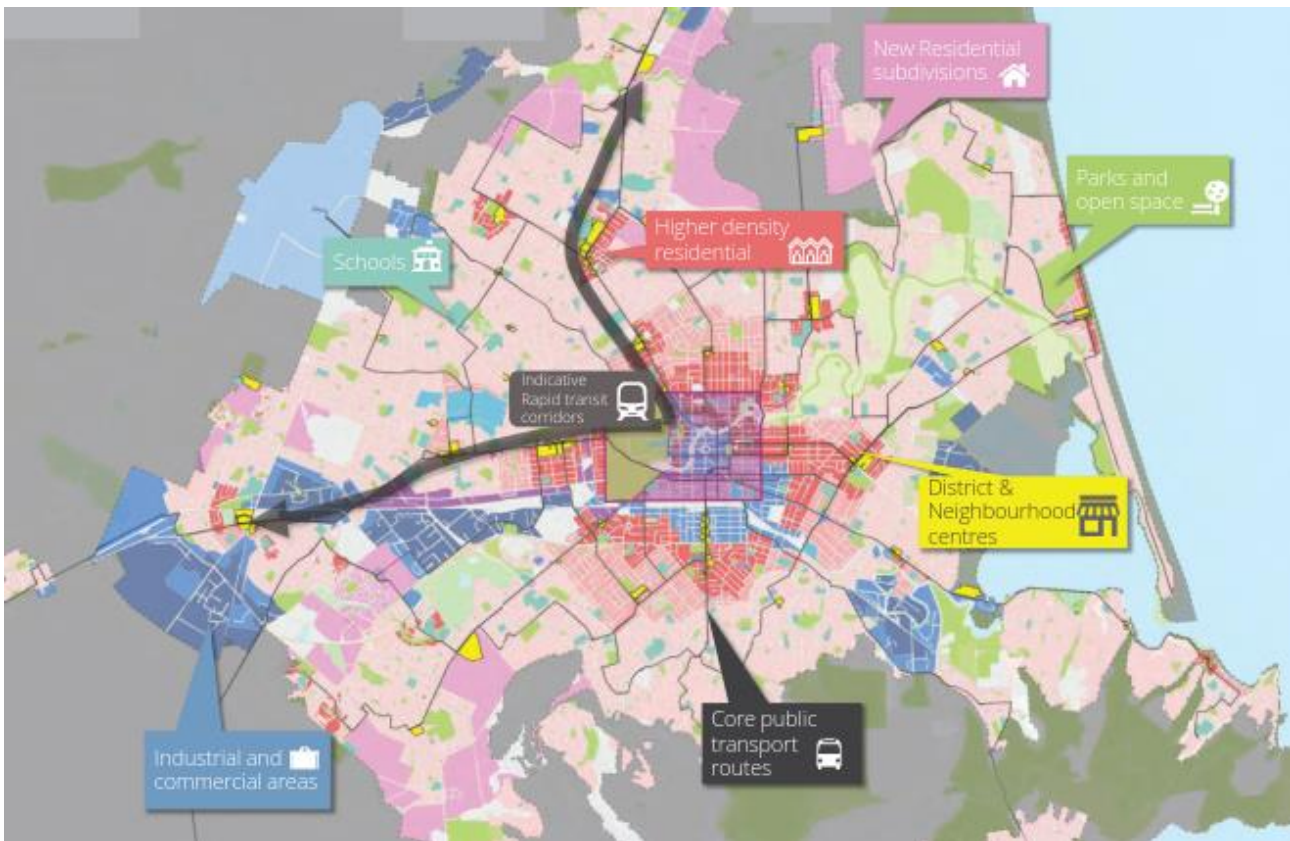
There will also be growth in employment opportunities. Over the next 30 years the central city will gain an additional 40,000 jobs, resulting in over 75,000 people working in the central city, many more than pre-quake. Employment is concentrated in a select number of areas – existing industrial and commercially zoned land and expansion of existing centres in the long term if required²⁰. Surplus industrial land is available to transition to commercial uses, particularly if needed to support central city growth.

Half of all the jobs in Christchurch are and will likely continue to be located in the corridor between the Central City and Hornby, and nearby suburbs, including Sydenham, Addington, Riccarton, Ilam, Sockburn, and Wigram. Providing rapid transit (busways or light rail) along this corridor will make it easier for people to reach these employment opportunities and also catalyse housing development, so more people can have the opportunity to live closer to where they work. The Northern Corridor (between the Central City and Belfast via Papanui) is another opportunity where the provision of rapid transit could stimulate redevelopment. Over time other corridors such as to the airport, to Linwood and Cashmere could be considered for rapid transit to stimulate redevelopment. Outside these corridors

²⁰ The significant commercial shortfall identified by the capacity assessment for the long term, will be further sensitivity tested in the next capacity assessment.

commercial activity will continue to be located within the existing network of commercial centres particularly key activity centres²¹.

Figure 14: Christchurch Spatial Plan



Christchurch City is the principal centre of Greater Christchurch and contains most of the population, but the surrounding districts have also been growing quickly. Less than half of the residents of the surrounding districts work within the districts, resulting in significant commuter flows from the surrounding districts into Christchurch City. Over 100,000 vehicle trips each day travel between the districts and the City, putting pressure on the City's transport network.

As our region grows this will increase the delays on the transport network. Encouraging more of the growth to occur in Christchurch City, where the employment opportunities are, will be vital to manage the effects of growth and reduce transport network pressures. The city will work to reduce the number of vehicles that travel into the city, particularly single occupancy vehicles, but improve transport options such as active and public transport, to enable people to move around the city easily. Improvements to public transport services and infrastructure, along with associated demand management and road pricing are being considered as part of transport planning and development of business cases.

²¹ Riccarton, Hornby, Northlands/Papanui, Linwood/Eastgate, North Halswell, Belfast/Northwood, New Brighton and Barrington/Spreydon.

5.3 Selwyn and Waimakariri towns

The current district plans for Selwyn and Waimakariri provide for greenfield housing areas in alignment with the settlement pattern outlined for Greater Christchurch in Map A of the Canterbury Regional Policy Statement (CRPS).²² This map was inserted into the CRPS following the adoption of the Land Use Recovery Plan and covers the post-earthquake recovery period through to 2028.

The Partnership has previously considered the longer term growth needs of Greater Christchurch through to 2041, with the extent of planned greenfield areas around Christchurch City and the main towns in Selwyn and Waimakariri to support future housing growth delineated by the Projected Infrastructure Boundary on Map A.

Given the projected shortfalls in housing development capacity in Selwyn and Waimakariri to meet their future needs, a change to the CRPS is proposed to allow Chapter 6 and Map A the flexibility to respond to identified medium term capacity needs. Additional capacity will be directed in the first instance to the key towns of Rolleston, Rangiora and Kaiapoi in support of the public transport enhancement opportunities mentioned elsewhere in this Update. This is likely to identify future development areas in the two districts that are within the Projected Infrastructure Boundary. Such a change would be prepared subsequent to this Update and would likely be notified in 2019.²³ These new areas will provide much of the capacity required over both the medium and long term. A 2019 change to the CRPS would ensure that land can be rezoned to meet medium term capacity needs, and the longer term will be further considered as part of a comprehensive review of the CRPS scheduled for 2022. While it is intended Our Space provides direction to inform future Resource Management Act processes, Figure 16 is indicative only.

To most efficiently utilise land within identified future development areas, consideration will also be given to appropriate residential densities. An evaluation of the appropriateness of existing minimum densities specified in the CRPS for each territorial authority including a review of what has been achieved to date, constraints and issues associated with achieving these minimum densities, and whether any changes to minimum densities is likely to be desirable and achievable across future development areas will be undertaken in 2019.

²² Additional housing development in Rolleston has already been enabled through two Special Housing Areas.

²³ The Partnership is investigating whether to request using the new streamlined planning provision in the Resource Management Act 1991 to make this targeted change to the Regional Policy Statement.

The tables below show the density scenarios and anticipated yields from future development areas should density be managed differently in Selwyn and Waimakariri Districts.

Table 5: Selwyn: Long term shortfall : 5,475

	Density scenarios and anticipated yields from FDAs [^]		
Theoretical additional capacity enabled in existing urban areas*	Density 10 hh/ha	Density 12 hh/ha	Density 15 hh/ha
0	4,700	5,650	7,050
500	5,200	6,150	7,550
1,000	5,700	6,650	8,050
1,500	6,200	7,150	8,550
2,000	6,700	7,650	9,050

Table 6: Waimakariri: Long term shortfall : 7,675

	Density scenarios and anticipated yields from FDAs [^]		
Theoretical additional capacity enabled in existing urban areas*	Density 10 hh/ha	Density 12 hh/ha	Density 15 hh/ha
0	4,500	5,400	6,750
500	5,000	5,900	7,250
1,000	5,500	6,400	7,750
1,500	6,000	6,900	8,250
2,000	6,500	7,400	8,750
2,500	7,000	7,900	9,250

* Subject to enabling this additional capacity via the District Plan Review and using other mechanisms outside of the District Plan to encourage infill/intensification development. Whilst more theoretical capacity may be enabled through District Plan Reviews, robustly calculating feasibility is also limited by a lack of comparable development that provides data (e.g. house sales) within zoned areas.

[^] This is derived from a total 'gross' hectare and does not take into account infrastructure requirements and structure planning that may reduce the developable area and total dwelling count.

In the meantime, it is expected that new urban housing in Waimakariri and Selwyn will achieve a minimum net density of 12 households per hectare²⁴ where any Future Development Area is subsequently zoned. For this purpose, net density has the same meaning as set out in the Canterbury Regional Policy Statement. This will also provide strong guidance for the development of District Plans for both Waimakariri and Selwyn districts.

The housing demand figures in Table 1 captures some additional growth from rural areas. This is from area units that are either part rural or all rurally zoned being included in the demand figures. However, most of this rural future demand will continue to be met by rural developments in rural zones with some moving to urban areas.

Selwyn District and Waimakariri District are undertaking reviews of their respective District Plans. Both reviews will also assess additional provisions to encourage and enable redevelopment within existing urban areas and close to town centres. This is in response to the projected changes in housing demand over the next thirty years, and the role that redevelopment plays to deliver smaller, more affordable housing types that will increasingly be needed to meet future demand. Until these reviews are complete, an understanding of whether any remaining development capacity shortfalls remain is uncertain and can be better understood as part of future capacity assessments in 2020 and every three years thereafter.²⁵

For Selwyn, this Update supports the purpose and direction of Selwyn 2031 by promoting a sustainable, consolidated centres-based urban growth pattern that supports the changing population and their housing needs. This, in turn, allows for greater public transport usage. The District Plan Review is supporting this by not actively seeking to rezone additional land for living or business outside of the Projected Infrastructure Boundary. This Update

²⁴ This expectation is that a minimum density of at least 12 households per hectare will be achieved.

²⁵ Some potential yields from different development scenarios were investigated as part of the options assessment outlined in Section 5.7.

will help provide a further evidence base for updates to Selwyn 2031 and other strategic documents to accommodate long-term growth through high quality urban environments. Any potential additional provision of business and housing land within the Greater Christchurch area in Selwyn will be strongly guided by this evidence and the current structure plans and town centre studies, ongoing market indicator monitoring and the evolution of the policy framework through the district plan review process.

For Waimakariri, the Council is at the early stages of planning to develop Structure Plans for east and west Rangiora and east Kaiapoi to identify how best to respond to the residential shortfall in capacity for the medium to long term. This is along with considering the long term capacity requirements of Ravenswood/Pegasus and Woodend, outlined in Waimakariri 2048: District Development Strategy.

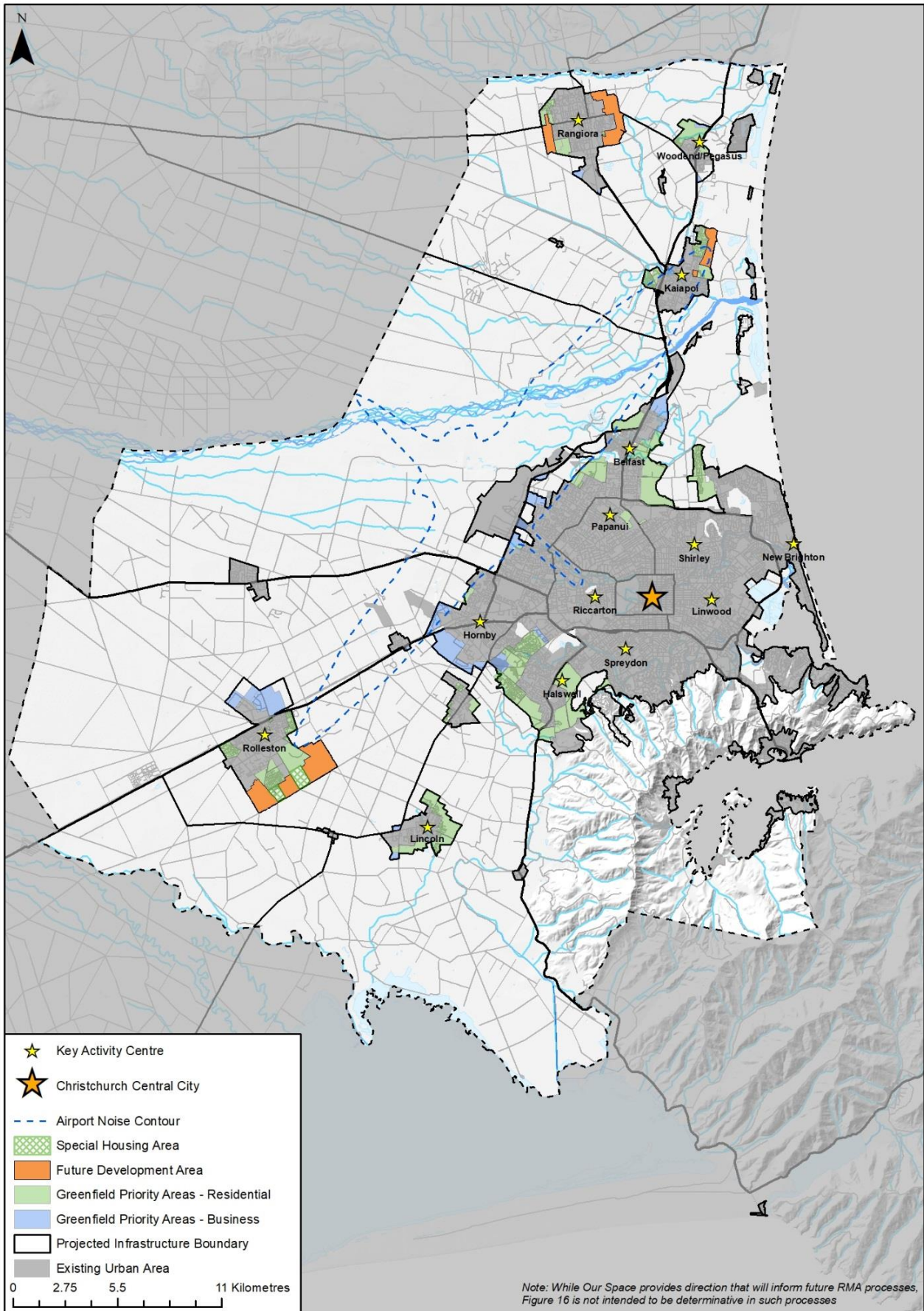
The Council is also focusing on adopting the Kaiapoi Town Centre Plan and updating the Rangiora Town Centre Strategy to continue to improve the self-sufficiency of these townships. Once these planning documents have been completed, additional zoning requirements to meet capacity shortfalls in both residential and commercial will be considered as part of the District Plan Review. This will be supported by monitoring ongoing market indicators and detailed commercial assessments.

Figure 15: Proposed Future Development Areas in Rolleston, Kaiapoi and Rangiora



Figure 16: Proposed locations of future development areas in Greater Christchurch.

While it is intended Our Space provides some direction to inform future RMA processes, Figure 16 is indicative only.



5.4 Land for cultural purposes

Important for mana whenua is the future ability to establish kāinga nohoanga settlements on their ancestral land. The concept of kāinga nohoanga embodies the following types of residential activities:

- Provision for whānau where extended families can live in close proximity to one another and build strong networks and relationships;
- Allowance for the construction of a mixture of housing types and densities;
- Provision for dwellings to be located in close proximity to traditional structures, such as marae, and the enablement of customary activities.

Kāinga nohoanga is not only about creating housing opportunities on tribal land. It is also about providing the commercial, social and community facilities and opportunities that allow Ngāi Tahu whānui to fully occupy and use ancestral land, recognising and enabling the principles for which the land was originally set aside.

Historically, there have been many barriers to the development of Māori customary land, including rural zoning (thereby preventing more intensive residential developments) and the lack of provision of services.

Substantial changes were made to the Waimakariri District Plan following the statutory directions included in the Land Use Recovery Plan. Further work between mana whenua and local authorities is creating a more permissive environment for the creation of kāinga nohoanga, although much work remains to be done.

Additional challenges facing the development by mana whenua of their ancestral land are the issues of climate change and sea level rise. It is likely over coming years that some Māori customary land will be more difficult to service with some areas becoming inundated, rendering them unusable for customary purposes. In these circumstances, it will be necessary for new land to be acquired and classified as Māori land under the Te Ture Whenua Māori Act 1993.

Recently, significant progress has been made in both the Canterbury Regional Policy Statement, the Christchurch District Plan and the review of the Selwyn District Plan towards creating a planning framework that is better equipped to enable kāinga nohoanga to be developed on Māori customary land, provided any adverse effects are appropriately avoided, remedied or mitigated (particularly those effects that have the potential to emanate beyond the boundary of the kāinga nohoanga development/zone).

At present, there are only two parcels of land within the existing greater Christchurch urban area that are classified as Māori customary land (in accordance with the Te Ture Whenua Māori Act 1993); namely, MR873 at Tuahiwi and MR875 at Rāpaki. In the future, however, it is possible that new areas within the Greater Christchurch urban area may be classified as Māori customary land, provided such land has been appropriately designated as such under the Te Ture Whenua Māori Act 1993.

While it is not anticipated that future kāinga nohoanga developments would be a major contributor to the overall housing capacity within greater Christchurch, they are nonetheless viewed by Ngāi Tahu whānui as playing an important future role in enabling mana whenua to live, work and play on their ancestral land in a manner that is consistent with the purposes for which such land was originally set aside pursuant to Kemp's Deed of 1848.

It is anticipated that an integrated and collaborative approach between district councils and Ngāi Tahu whānui would be taken to any necessary upgrades of infrastructure that are deemed necessary to service future kāinga nohoanga developments, including reticulated sewerage, wastewater disposal and the supply of drinking water.

5.5 Sequencing and staging of growth

At a local level the Capacity Assessment outlined which areas signalled for growth are already supported by trunk infrastructure.²⁶ This primarily relates to wastewater networks. Infrastructure strategies associated with the recent completed 2018-2028 Long Term Plans have documented the planned infrastructure works scheduled to be completed over the medium and long term to unlock remaining growth areas. These integrate and align with structure plans for main towns covering the development phasing associated with the efficient roll-out of infrastructure.

At a Greater Christchurch level sequencing is important to align with cross-boundary investments, especially those relating to the transport network. Collaborative planning undertaken when developing infrastructure strategies and regional land transport plans will be the mechanism to address and resolve any potential misalignment.

Future growth areas identified in Figure 15 and 16 will require more detailed planning, technical assessments and consultation with landowners to determine more specific staging of development. Existing policies in Chapter 6 of the CRPS already provide clear direction which these detailed planning processes must give effect to, particularly Policies 6.3.2 to 6.3.7. They ensure the staging of development considers how to support good urban design, align with infrastructure needs and integrate with existing urban areas. Associated policy wording is proposed to complement a change to the CRPS Map A. This will enable District Plan reviews for Selwyn and Waimakariri Districts to, over the medium term, zone and otherwise enable development capacity in accordance with meeting the medium term housing targets incorporated in the CRPS. Reviews of targets and the sufficiency of development capacity are part of periodic capacity assessments and enable the CRPS and district plans to remain responsive to demonstrated need.

All greenfield growth areas within Christchurch City are already zoned. Redevelopment is largely not constrained by infrastructure so the location and timing of development will be principally governed by the market. The role of the City Council and other influencers is therefore to encourage and support the market to respond to opportunities most likely to support Central City and suburban centre growth and increase the scale and range of housing available close to key public transport routes.

5.6 Transport and other infrastructure

Integrated land use and transport planning

Over the next 30 years, Greater Christchurch is projected to see significant population growth, meaning more people will be making more trips across the transport network. If traffic volumes increase at the same rate as the population, there will be more congestion and longer journey times. Further major investment in the road network is not scheduled. For Greater Christchurch to remain productive, the integration of land use and transport planning is therefore essential to managing our future urban growth.

Transport infrastructure, services and mode choices are important for enabling and supporting population and housing growth in new and existing urban areas, while the location of growth affects how well the transport system performs. Given transport and land use are so strongly connected, all decisions need to consider their impact on the other.

In this context, the Government Policy Statement on Land Transport (GPS) has provided new opportunities for how we can plan for growth as it represents a fundamental shift in the strategic direction for transport in New Zealand. It seeks to transition to a more holistic, mode-neutral approach to transport investment, with an increased focus on achieving a range of social and environmental outcomes. It also places more emphasis on the crucial role of transport in shaping urban form, creating liveable cities and reducing the need to travel by private vehicle.

It will be important to ensure that transport is integrated with land use but also that all the components of the network are joined in a way that makes it easier to make choices on how to travel. Greater Christchurch already has a well-integrated network that has very high accessibility. This means that for a majority of areas there is a choice of

²⁶ Outlined in Section 4.2 and 8.3 of the Capacity Assessment and further detailed in supporting technical reports.

options for walking, cycling, public transport or using a private car, with strong integration between these different modes of travel.

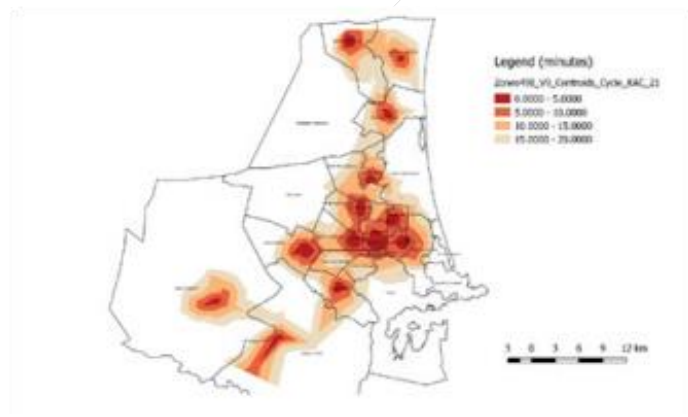
Recent investments in the cycleway network have provided more opportunities to encourage safer cycling trips around Christchurch City and between centres, while technological advances through electric bikes will mean that this mode will become increasingly accessible as a means of travel.

However, with significant population growth within the City and in the surrounding districts, the current freedom and independence we enjoy in travelling around will in future become more difficult unless there is a significant shift in how we think about and approach transport.

Transport business cases underway will consider the multi-modal transport programme that will address such matters. These include specific investigations to determine the appropriate investment required to support an enhanced public transport system and improvements along key transport corridors, including those that are part of the strategic transport network and support freight movements. This programme will be developed on the basis of the strategic directions from the UDS, and would contribute to the strategic goals related to an integrated and managed urban development.

In particular, it will help create a more efficient, reliable, safe and resilient transport system that promotes the use of active and public transport, and improves accessibility for all people in Greater Christchurch. Integrating land use and transport is particularly important for rapid transit and supporting an efficient public transport network. Each can have a positive influence on the others by improving the accessibility of an area and supporting growth and housing density around rapid transit corridors and stations. This is essential to maximise the benefits from the large investment required to build and operate rapid transit.

Figure 17: Cycling accessibility from activity centres



Future of public transport

The strategic priorities underpinning the GPS align with the work being undertaken by the Greater Christchurch Public Transport Joint Committee to deliver a step change in Greater Christchurch's public transport, as described in the Canterbury Regional Public Transport Plan (RPTP).²⁷ The RPTP contains an ambitious vision to fully integrate the public transport system with the wider transport system and urban form, thereby increasing mobility and accessibility across Greater Christchurch.

Vision for Greater Christchurch's public transport system

Public transport is innovative and successful and sits at the heart of a transport network that supports a thriving, liveable Greater Christchurch. The public transport system is accessible and convenient, with high quality, zero emission vehicles and facilities. The system gets people where they want to go – as a result it is well used and valued by the people of Greater Christchurch.

As part of achieving this vision by 2048, the RPTP envisions two rapid transit corridors that will offer high speed public transport services to the north and south-west of Christchurch City, significantly enhancing links with the growing towns of Rolleston, Rangiora and Kaiapoi. By investing in rapid transit services (such as light rail, rapid bus ways or automated trackless trains) and encouraging higher density development along high demand corridors, more people will be able to access jobs, services, recreation and education without necessarily having to rely on a private vehicle. Ensuring public transport is increasingly usable for all people has major social, environmental and economic benefits.

The improvements outlined in the RPTP include service enhancements across the network, infrastructure improvements on key routes, on-demand services (such as demand responsive transport, bike sharing, ride sharing and car sharing) and being well equipped to adopt new opportunities arising in information technology, intelligent transport systems, zero-emission vehicles and autonomous vehicles.

Realising this vision for our public transport system will require an increase in investment. The Government has signalled through the GPS that the overall level of capital investment available for public transport will be greater, reflecting the strategic focus of shifting trips in New Zealand's cities from private vehicles to more efficient, low cost modes of transport.

Further conversations with the Government will explore how additional funding could help us to achieve our vision for public transport more quickly, supporting our aspirations for a consolidated urban form and multi-modal journeys.

Freight transport

Greater Christchurch is also a major freight hub for Canterbury and the South Island, with two inland ports, the Port of Lyttleton and Christchurch International Airport acting as major gateways for produce and people. The strategic road and rail networks in Greater Christchurch also play a significant role in the distribution of freight within the sub-region, as well as to neighbouring regions and the rest of New Zealand.

An important part of managing the transport network is to ensure that freight can be moved efficiently to and through Greater Christchurch will require effective management of congestion on the main freight routes. It is crucial that the strategic infrastructure and networks across Greater Christchurch are able to meet future demand and are protected from any adverse effects of growth. This is a key aspect of the Regional Land Transport Plan (RLTP) and transport business cases to support future transport investments.

Future programme and investment

While the Partnership is working towards improving transport choice, more work is needed to get people thinking about how they travel differently, whether it be by public transport, walking, cycling or as a passenger in a private car.

Such a transport programme would include:

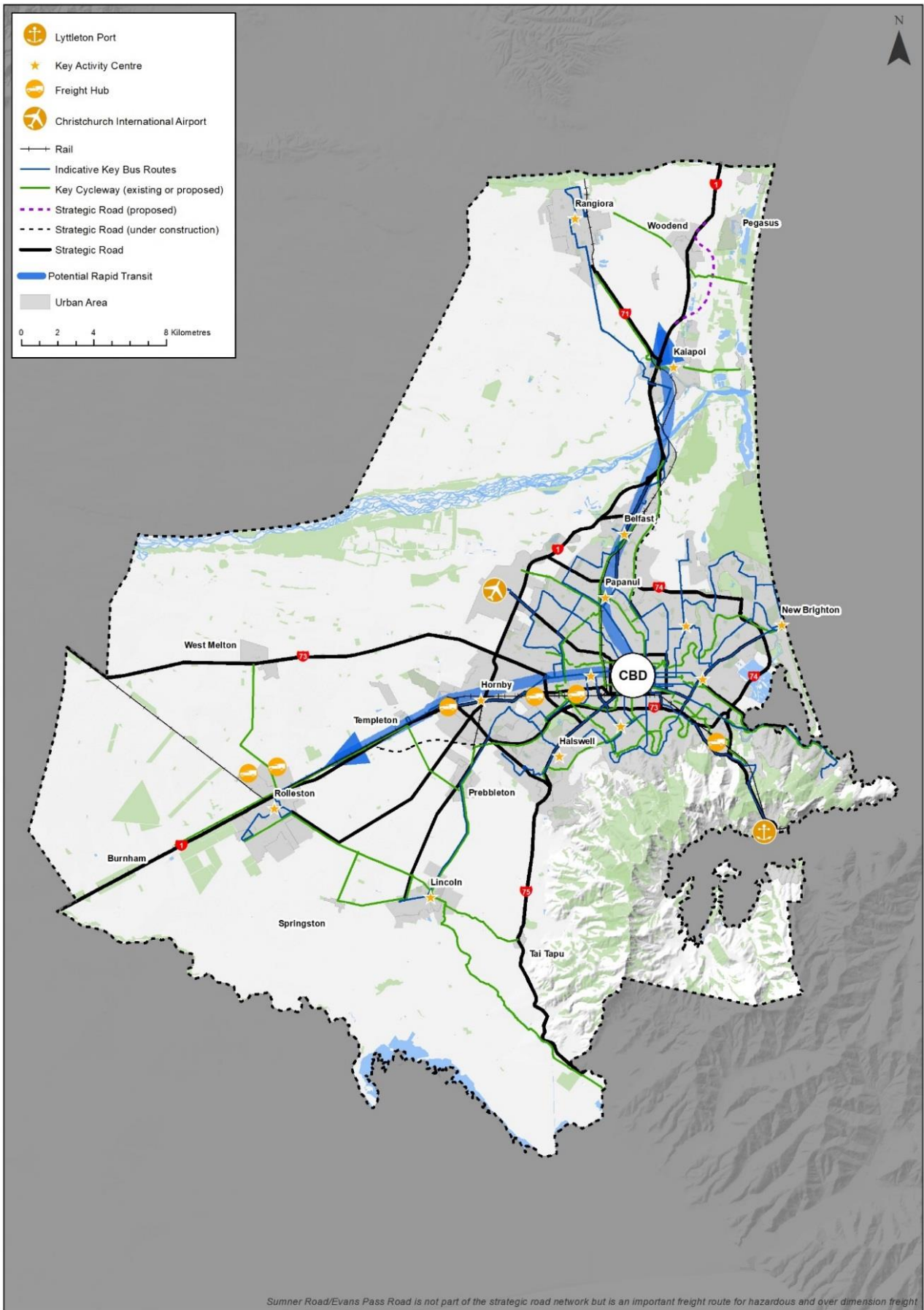
- Improved public transport network and services including mass transit corridors;
- Development of walking and cycling networks;
- Travel demand management initiatives;
- Completion of funded strategic road network improvements, including the Northern Corridor and Southern Motorway;
- Embracing new technology changes

How to improve integrated land use and transport planning was a key deliberation when deciding how future urban development should be accommodated in Greater Christchurch. Part of the rationale for the locations for growth was therefore to ensure future growth is appropriately aligned with long term transport planning and investment, meaning more people will be living in areas that are accessible to a mix of transport modes.

The existing and future Christchurch transport network is shown in Figure 18. Investment in this future will be considerable (approximately \$1.56b capital and additional annual operating costs) over the next 30 years and needs to be well aligned to a supportive land use. It will require collaboration and investment by the Greater Christchurch Partnership and Central Government as well as the community to achieve this outcome.

Reduced reliance on private vehicles as a result of increased land use and transport integration will have associated congestion, safety, access, environmental and cost benefits for people and communities across Greater Christchurch.

Figure 18: Greater Christchurch transport network – existing, planned or proposed routes and modes²⁸



²⁸ Routes for proposed rapid transit, other public transport services and cycling are all indicative unless already adopted in relevant Council plans.

Other development infrastructure

Infrastructure networks required to enable new development principally relates to transport and the three waters: water supply, wastewater and stormwater. Based on extensive strategic planning undertaken through the Partnership over the last decade to identify future locations for housing and business growth, the constituent partner councils have been able to plan for and invest in the infrastructure needed to support development in these areas. This means most areas proposed in this Update for future development are already sufficiently serviced to be considered 'shovel ready'.

Most of the areas not currently serviced with sufficient infrastructure network capacity will be following the completion of planned upgrades.²⁹ This includes in parts of the northern, south-western and eastern areas of Christchurch City. These capacity constraints are addressed in Christchurch City Council's Long Term Plan and will be resolved by 2028.

Councils' infrastructure strategies outline how sufficient infrastructure network capacity will be provided for to ensure future growth is effectively and efficiently accommodated. Although Christchurch City Council's Infrastructure Strategy is based on a lower projected growth for the next 30 years than is considered in this Update, the Council has processes, plans and initiatives that can appropriately manage infrastructure capacity requirements to ensure that the housing growth targets proposed in this Update are met. More detailed infrastructure modelling of areas proposed for commercial redevelopment will follow once specific locations are identified.

In the same way, the Selwyn Infrastructure Strategy also uses a lower projected growth for the next 30 years than is considered in this Update. However, all zoned land as well as land within the Proposed Infrastructure Boundary and Special Housing Areas have been factored into the strategy. Further, any additional up-zoning or greenfield capacity to cater for projected growth, will need to be factored into the infrastructure works programme once the next phase of strategic planning has been undertaken.

Discussions with other infrastructure providers indicate that the availability of such infrastructure as electricity and telecommunications is either available or will be available to service all housing and business growth needs in Greater Christchurch over the next 30 years. The provision of social and community facilities, including schools, healthcare and community halls, have also been well planned for as part of the post-earthquake recovery planning for Greater Christchurch, and are therefore not considered to represent a constraint on future development. Existing planning provisions in the CRPS and district plans ensure growth does not compromise the efficient operation of strategic infrastructure.

It will be important that constituent partner councils continue to engage with infrastructure providers to ensure growth is effectively and efficiently supported over the next 30 years by delivery of necessary infrastructure.

5.7 Why is this our proposed approach?

Aligning with the strategic growth directions from the UDS

This Update furthers the achievement of economic, social, environmental and cultural wellbeing outcomes outlined in the UDS and summarised in Section 2.3. It sets out a settlement pattern and a consolidation approach to urban development that is more sustainable than might result from a more *laissez faire* scenario. It responds to anticipated changes in demand while supporting wider programmes of action to address challenges, such as climate change, that require solutions beyond just urban planning.

The locations for growth outlined in Section 5, *Our Plan* and the housing targets (detailed in Section 3.2) reflect a balanced approach to achieving the consolidated growth directions of the UDS while responding to current and projected market demands. The settlement pattern supports a key aim of the UDS to create a vibrant and thriving Central City.

²⁹ Some industrial zoned land in Christchurch City is not proposed to be serviced.

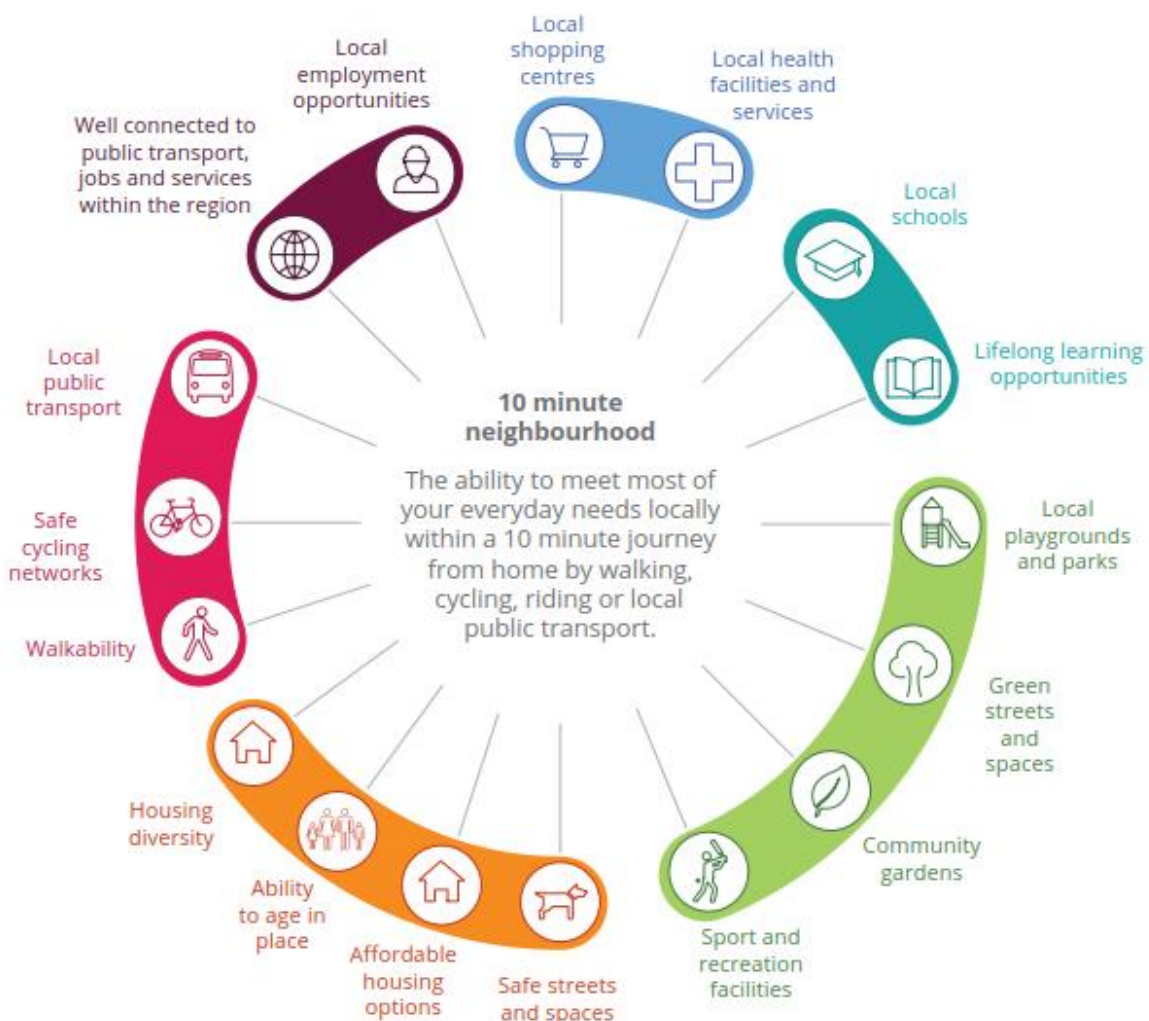
It fosters an increasing Central City population and enables the Central City and surrounding business land to transition over time to provide for increased office and retail floorspace, maximising the existing public and private investments made throughout a period of recovery.

This approach meets the requirements of the NPS-UDC, being informed by the Capacity Assessment and having had particular regard to NPS-UDC Policy PA1, but has also been guided by the UDS, CRPS, District Plans and the Long Term Plan and Infrastructure Strategies required under the LGA. The Partnership is conscious of the need to balance the certainty regarding the provision of future urban development with the need to be responsive to demand for such development. Ongoing requirements in the NPS-UDS for evidence and monitoring to support planning decisions will enable periodic review and consider any required amendments to this approach.

Consolidated growth enables towns and centres to more easily provide the local facilities and services that communities need and maximises the efficiency of key transport routes and other infrastructure services. Supporting the growth and vitality of key activity centres is engrained in the UDS and the CRPS Chapter 6 gives strong policy direction to territorial authority plans. Figure 19 encapsulates this concept and outlines the types of services, amenities and factors that councils and other agencies can provide for in these areas.

The settlement pattern enables around two-thirds of new households to be accommodated within the Christchurch City area and allows for the larger towns in Selwyn and Waimakariri Districts to continue to grow.

Figure 19: Concept of a 10-minute neighbourhood for key centres



This provides a good level of housing choice across Greater Christchurch and recognises that within a single housing market there are many and varied reasons for where and how people choose to live.

Taken together, new subdivisions in greenfield locations across all three council areas will account for around 55% of the identified housing capacity. 'Intensification', being development in existing urban areas through infill and redevelopment, is expected to provide for the remaining 45%, primarily in Christchurch City but not exclusively. This broadly corresponds with intensification targets already outlined in the CRPS and Christchurch District Plan.

As outlined in Section 3, Our Growth Needs, much of this housing capacity is already provided for in District Plans. The responses outlined in this document centre on the remaining housing shortfalls shown in Table 3 (around 15,500 dwellings) for Selwyn and Waimakariri Districts to meet housing targets being considered in context with wider strategic planning.

Directing future housing growth to development capacity already signalled by the Projected Infrastructure Boundary in Map A of the CRPS represents the most efficient and effective option for accommodating these shortfalls. For some time now the Councils have factored these areas into respective 30 year infrastructure strategies associated with Long Term Plans. These plans have already benefited from extensive community input, as did the earlier UDS engagement and subsequent resource management and recovery consultation processes that led to Chapter 6 of the Canterbury Regional Policy Statement.

Further more detailed assessment of these future growth areas will be required, and undertaken as part of district plan reviews, and can address any new requirements relating to managing risks of natural hazards and mitigating impacts on versatile soils.

Reflecting changing housing needs

As outlined in Sections 2, 3 and 4 demographic change will mean an increasing percentage of our population will be over 65 and average household size will continue to decline. The cost of housing, both home ownership and renting, will continue to represent a significant component of household expenditure.

New households will have different housing preferences and affordability constraints, but to better align the total housing stock across Greater Christchurch with the overall household composition, new development would need to favour smaller and more affordable housing types.

Smaller and multi-unit dwellings that take advantage of more efficient building construction techniques and adopt new home ownership and rental models can aid the provision of more affordable homes. Housing should meet the needs of our population at all stages of life. Locating new development closer to the provision of local facilities and community services can also improve access to the health needs of a population that is both aging and has increasing long term conditions and disabilities, and reduce the transport costs associated with overall household expenditure.

Increasingly more households are also beginning to take advantage new technology and on demand services to enable a more inner-city lifestyle, closer to the social and cultural amenities offered in and around the centre of Christchurch. The implementation of the 8011 Central City Housing Programme will determine the scale of demand in this market segment and the role public agencies and private sector developers can play to provide for this housing type.

These trends have therefore informed the transitional approach adopted when setting housing targets in Table 2.

Supporting future public transport investment

The future investment in our public transport system highlighted in Section 5.6 will influence and be influenced by how our City and surrounding towns accommodate future growth. For such investment to be sustainable it needs to foster significant increases in public transport patronage.

A settlement pattern approach that encourages greater urban densities, particularly along key public transport corridors provides the greatest opportunity for people to live in close proximity to proposed new rapid transit routes, increasing the likelihood and attractiveness for people to adopt these transport modes.

What about other options?

In arriving at this settlement pattern, three alternative options were investigated.

One option investigated providing for growth based directly on the population and household projections derived from Statistics NZ data (Option A). Another option considered a scenario whereby a greater proportion of additional household growth was directed to the Christchurch City area over the next 10 years, anticipating a more rapid return to the levels of redevelopment in the City experienced prior to the earthquakes (Option B).

Compared to this Update (Option C), Option A would require increased capacity to be provided in Selwyn and Waimakariri Districts for the period 2028-2048, totalling nearly 10,000 additional dwellings.

Compared to our plan (Option C), Option B would reduce the housing provision necessary to be identified in Selwyn and Waimakariri Districts over the next 10 years by around 5,500 dwellings (resulting in a total of 15,000 dwellings less than Option A over the 30 year period), relying on the range of housing options available in Christchurch City to meet housing demand not able to be accommodated in the main towns of the Districts.

Aside from further mitigating many of the local effects identified for Option A, assessment of Option B focused on the significant departure from current market housing conditions.

Option B would require average annual building consents for additional dwellings to be 1750/yr for Christchurch City with an increasing proportion met through redevelopment. While consents for new housing in Selwyn and Waimakariri Districts appear to have softened over the last year (partly due to a general decrease in the level of building consents across Greater Christchurch during 2018), in Selwyn they are still tracking closer to the high growth rate.

Further explanation and assessment of these options, and the reasons why Option C was considered the selected option, is covered in a separate options assessment document.

6.1 Responsive planning

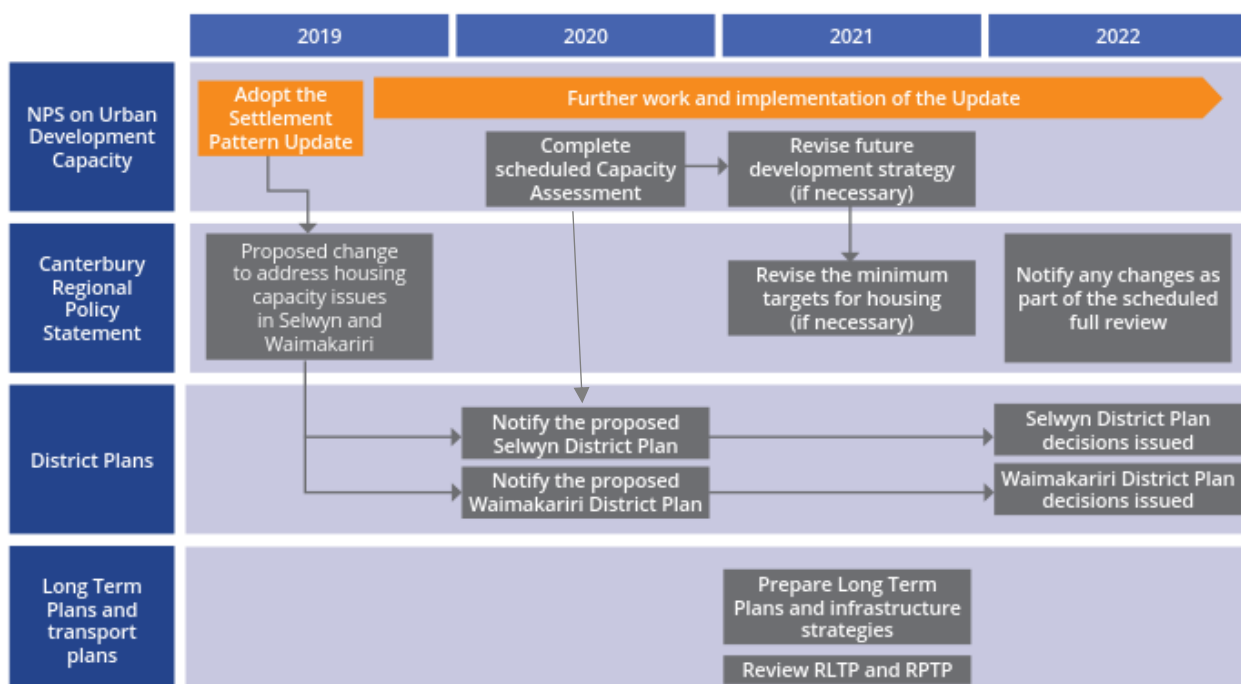
With many of the primary drivers and influencers of urban development in Greater Christchurch being in a state of change, a responsive approach to planning is necessary to ensure that future opportunities to shape our urban areas and achieve our desired outcomes are realised. This will require monitoring and evaluation, continued relationship building and commitment to this partnership. Key drivers of change at the local, national and global level include:

- Shifting post-earthquake trends in the residential, commercial and industrial markets, as well as the development sector, as the rebuild and recovery of Greater Christchurch continues to mature;
- Emerging Government policy in relation to urban growth and development, transport, regional economic growth, and local government funding and financing, which will provide new opportunities for our approach to planning;
- Changing population and household profiles, and composition of the local economy, which will influence the type of housing and employment that is required in the future to meet the needs and preferences of residents;
- Evolving technologies (such as mass automation, digital workspaces) and their increasing adoption, which will influence how our urban areas function, especially in terms of how people work and travel (such as autonomous vehicles);
- Delivering large-scale regeneration projects that will significantly affect surrounding local areas and communities, and Greater Christchurch overall, including for the Ōtākaro Avon River Corridor, Kaiapoi area and Central City;
- Growing need to manage and adapt to the natural hazard risk facing our coastal communities given the anticipated sea level rise, and related coastal inundation and groundwater level effects, over the next 30 years and beyond.

Given these drivers of change, this Update has been prepared to provide greater certainty over the medium term in regard to how development capacity issues will be addressed (Section 4, *Our Challenges*) and more flexibility over the long term to enable the Partnership to further consider the most appropriate planning directions and responses.

In response to this Update, the Regional Council and District Councils will insert the relevant housing targets directly into their respective plans, in accordance with NPS-UDC Policies PC5 to PC11.

Figure 20: Scheduled implementation and review process 2019-2022



6.2 Further work and implementation

The Partnership is committed to undertaking further work to assess, consider and address some of the priority growth issues for Greater Christchurch. These actions include workstreams already planned by constituent partners and those that are now proposed to respond to the priorities identified in this Update. The aim of this future work is to ensure our long term planning directions for Greater Christchurch are appropriately investigated and implemented.

The key actions from this Update have been grouped under three broad themes:

- Strengthen our partnership approach;
- Improve our tools and evidence base;
- Build on our planned direction for growth.

Many of the actions that will be undertaken to implement this Update are linked to pre-arranged planning processes, in that they will be undertaken as part of these processes or help inform them. Such processes include the district plan reviews underway for Selwyn and Waimakariri, the full review of the CRPS scheduled for notification in 2022, and the statutory requirement from the NPS-UDC for another Capacity Assessment to be prepared in 2020.

Schedule of future work

No.	Description	Lead Partners	Timeframe
STRENGTHEN OUR PARTNERSHIP APPROACH			
1	<p>Work with the Government to further explore opportunities to develop an agreement on the priority actions and investments that will contribute towards an agreed set of growth and wellbeing outcomes for Greater Christchurch.</p> <p>Linked processes: Second stage of the Government Policy Statement on Land Transport</p>	All GCP Partners	2019
2	<p>Work with Government and social and affordable housing providers to better address current and future housing needs across Greater Christchurch, developing an action plan to increase provision. Investigate the most suitable locations and opportunities for new housing ownerships models (such as shared ownership, co-housing, etc). This would be prepared in accordance with the following timeframes</p> <ul style="list-style-type: none"> • an MOU with the GCP and Network July 2019 • A project plan and project lead resource August 2019 • A good practice and/or barriers research component October 2019 • A forum and or consultation component December 2019 • A draft action plan February 2020 • Integration and alignment with District Plan Reviews April 2020 • Integration and alignment with Annual Plans June 2020 <p>Linked processes: Next Capacity Assessment, Selwyn and Waimakariri District Plan Reviews and Council's Long Term Plans</p>	CCC, SDC, WDC	2019 - 2020
IMPROVE OUR TOOLS AND EVIDENCE BASE			
3	<p>Undertake an evaluation of the appropriateness of existing minimum densities specified in the CRPS for each territorial authority including a review of what has been achieved to date, constraints and issues associated with achieving these minimum densities, and whether any changes to minimum densities is likely to be desirable and achievable across future development areas in Selwyn and Waimakariri districts.</p> <p>Linked processes: Canterbury Regional Policy Statement review, Selwyn and Waimakariri District Plan Reviews</p>	SDC, WDC, CCC, ECan.	2019-2022

4	Develop and agree a single growth model for Greater Christchurch that evaluates the demand, supply, feasibility and sufficiency of residential and business development capacity. Linked processes: Next Capacity Assessment and Council's Long Term Plans	CCC, SDC, WDC, ECan	2019 - 2020
5	Review and recalibrate the Christchurch Transport Model and Christchurch Assignment and Simulation Traffic Model. Linked processes: Next Capacity Assessment and Council's Long Term Plans	CCC, SDC, WDC, ECan, NZTA	2019 - 2020
6	Prepare a new Housing and Business Development Capacity Assessment that provides up-to-date information on current and future housing and business trends. Linked processes: National Policy Statement on Urban Development Capacity, and Selwyn and Waimakariri District Plan Reviews	CCC, SDC, WDC, ECan, Ngai Tahu	2020
BUILD ON OUR PLANNED DIRECTION FOR GROWTH			
7	Insert relevant housing targets directly into the Canterbury Regional Policy Statement and District Plans, in accordance with NPS-UDC Policies PC5 to PC11. Linked processes: adoption of Settlement Pattern Update	ECan, CCC, SDC, WDC	2019
8	Improve the alignment and integration of constituent partner council's infrastructure strategies through a coordinated approach that is guided by an overarching sub-regional approach to infrastructure planning and delivery. Linked processes: Council's Annual Plans and Long Term Plans	CCC, SDC, WDC	2019 - 2021
9	a. Prepare a Proposed Change to Chapter 6 of the CRPS at the earliest opportunity to: <ul style="list-style-type: none"> modify Map A to identify the Future Urban Development Areas shown in Figure 15, and include a policy in Chapter 6 of the CRPS that enables land within the Future Development Areas to be rezoned in District Plans for urban development if there is a projected shortfall in housing development capacity in Table 3 of Our Space, or if the capacity assessment referred to in Action 6 (or subsequent periodic capacity assessments) identifies a projected shortfall in feasible development capacity. enable territorial authorities to respond to changes in the sufficiency of development capacity over the medium term on a rolling basis as a result of periodic capacity assessments. b. Selwyn and Waimakariri District Councils to undertake structure planning (including the consideration of development infrastructure and the downstream effects on the Greater Christchurch transport network) and review of District Plans over the next year for the identified Future Development Areas in the 2019 CRPS Change set out in Action 9a above, to provide for the projected medium term shortfall shown in Table 3 or the capacity assessment referred to in Action 6 (or subsequent periodic capacity assessments), at a minimum residential density of 12 households per hectare, informed by the evaluation undertaken as Action 3 above. The policy will sit within the existing objective and policy framework of Chapter 6 of the CRPS which applies to all local authorities in the Greater Christchurch Area, and which, in relation to the integration of land use and transport, includes policies 6.3.3, 6.3.4 and 6.3.5. ³⁰ Linked processes: Selwyn and Waimakariri District Plan Reviews	ECan, SDC, WDC	2019
10	Undertake detailed planning work for (in accordance with directions outlined in CRPS Chapter 6 and the proposed change identified in Action 9) the relevant Greater Christchurch towns in Selwyn and Waimakariri, including: <ul style="list-style-type: none"> Evaluating zoning options to further promote consolidated townships; 	SDC, WDC	2019 - 2023

³⁰ Policy 6.3.3 requires that development proceed in accordance with an outline development plan. In addition, Policy 6.3.4 promotes transport effectiveness, and Policy 6.3.5 relates to the achievement of land-use and transport integration by "ensuring that the nature, timing and sequencing of new development are co-ordinated with development, funding, implementation and operation of transport and other infrastructure..."

	<ul style="list-style-type: none"> Investigating opportunities to encourage the provision and uptake of a range of housing typologies to meet future demands, including considering options for redevelopment, intensification and kāinga nohoanga; Reviewing town centre masterplans and strategies, and exploring options to increase land supply for existing key activity centres <p>Linked processes: Selwyn and Waimakariri District Plan Reviews</p>		
11	<p>Facilitate the redevelopment of existing urban areas in Christchurch City through the:</p> <ul style="list-style-type: none"> Implementation of the 8011 Central City Residential Programme; Development and implementation of a redevelopment programme for medium density housing areas around key activity centres and along public transport corridors; Investigation of opportunities for transition of brownfield land for commercial and mixed use redevelopment <p>Linked processes: Christchurch City Council's Long Term Plan</p>	CCC	2019 - 2028
12	<p>Undertake a review of Chapter 6 (Recovery and Rebuilding of Greater Christchurch) of the Canterbury Regional Policy Statement as part of the scheduled full review, being informed by further planning work being undertaken by Councils and responding to any identified needs in the next Capacity Assessment due to be completed in 2020. Environment Canterbury will, prior to notification, engage with submitters on Our Space who sought the inclusion of land for business or housing development in relation to the appropriateness of including the subject land within Map A of Chapter 6.</p> <p>Linked processes: Selwyn and Waimakariri District Plan Reviews</p>	ECan	2022

In relation to Action 12, the following schedule of work is proposed.

Year 1 2019/2020	Project Plan and agreed scope for review
Year 2 2020/2021	<p>Completion of efficiency and effectiveness (RMA s35) review</p> <p>Completion of efficiency and effectiveness (RMA s35) review Collation of existing evidence base and identification of information gaps (based on District Plan reviews and structure planning completed)</p> <ul style="list-style-type: none"> Additional technical evidence completed (if required) – for chapter 6 specifically Density Transport Natural Hazards – including climate change and additional land areas required from Southshore project Settlement pattern <p>Initial engagement with strategic partners Agreed partner and stakeholder engagement plan – pre-notification engagement</p>
Year 3 2021/2022	<p>Draft Chapter 6 prepared for clause 3 Schedule 1 RMA consultation</p> <p>Section 32 Report completed</p> <p>Notification of Proposed Chapter 6 as part of full RPS review June 2022</p>
Year 4 2022/2023	<p>Submission and Further Submission</p> <p>Preparation of Officers' Report</p> <p>Hearing</p> <p>Decision expected in June 2023</p>

6.3 Collaborative partnerships

Opportunities and challenges facing Greater Christchurch in relation to how we will achieve our desired urban growth outcomes cross the administrative boundaries of Christchurch City, Selwyn and Waimakariri, and encompass a range of economic, social, cultural and environmental matters. Collaboration between local and regional councils, government agencies and Te Rūnanga o Ngai Tahu will therefore continue to be essential to successfully plan for growth.

The Partnership is committed to showing visible leadership and using a collaborative approach to address the growth issues identified for Greater Christchurch. Governance and implementation of this Update will be coordinated through groups at various levels of the Partnership, with the Greater Christchurch Partnership Committee responsible for its overall delivery. Although the implementation of this Update will principally be the domain of the constituent partner councils, other government agencies, mana whenua, the private sector, the third sector and the community also have a key role to play in ensuring we realise our shared vision for the future.

Coordinated action between public and private sector infrastructure providers, and the development sector, will be of particular importance to enabling the type and scale of development needed to accommodate our growth needs. It will be crucial that future investments are aligned with our planned direction for growth, which will require strong working relationships between constituent partner councils, infrastructure providers, developers and the property sector.

Building on the close ties already developed through the earthquake recovery, a strong working partnership with the Government will also be pivotal to unlocking the opportunities and addressing the challenges for Greater Christchurch. The Partnership will work closely with relevant agencies and ministries to explore how the Government could support urban development in Greater Christchurch in a way that both aligns with our future aspirations and the Government's bold intentions for New Zealand's cities, as signalled in the Urban Growth Agenda.

Partnering with the Government will include exploring the opportunity for developing an agreement on transport's role in shaping the future of Greater Christchurch, recognising that transport can be a key place-maker for urban areas. This partnership opportunity has already been signalled in the Government Policy Statement on Land Transport.

6.4 Research and monitoring

The Partnership has produced an extensive evidence base to better understand housing and business trends in Greater Christchurch, and inform the planning decisions set out in this Update. This has included monitoring a range of urban development indicators and preparing a Housing and Business Development Capacity Assessment.

It will be critical that the data and information used as the basis for future strategic planning continues to be refined to support a robust and up-to-date evidence base.

Examples of matters that will require further investigation include:

- Reviewing the 2018 Census results to identify any changes to the population, including to demographic and household profiles, and consider the suitability of the population projections used to underpin our strategic planning;
- Examining the key demand and supply-side factors influencing the housing market, such as preferences by location, constraints on the redevelopment market and the extent of interactions between local housing market areas;
- Interrogating the factors influencing the relative feasibility of developments in different local housing market areas, including testing these factors with local experts and considering how they may change over time;
- Investigating the key drivers for business and employment development in relevant towns in Selwyn and Waimakariri, and the viable options for increasing the self-sufficiency of these growing towns.

The Partnership publishes quarterly monitoring reports to track a series of core urban development indicators for Greater Christchurch. To improve our understanding of local market trends, the scope of these monitoring reports will be reviewed and expanded where appropriate to incorporate additional indicators. Monitoring trends and changes in

Greater Christchurch's residential, commercial and industrial markets are particularly important given the disruptions caused by the earthquakes, and the new normal that is being established as the recovery and regeneration effort progresses. It is important that this monitoring integrates with other monitoring processes at local and regional levels that will collectively help assess the achievement of the strategic goals of the UDS.





He muka harakeke, he whītau tangata.

The harakeke is woven with the human strand – binding people and places together.