

GLASGOW AND THE CLYDE VALLEY 2006 STRUCTURE PLAN ALTERATION

THE TWENTY YEAR DEVELOPMENT VISION

TECHNICAL REPORT

TR 3/06

Industry and Business Context Report

April 2006



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1.0 Introduction

- 1.1 This report provides statistics and analysis of the trends in the levels of unemployment and employment, the land supply for industrial and business development, and the development of land for industry and business in the Structure Plan area. The analysis is based on 2004 labour market information and the 2003/4 industrial and business land supply data provided by the constituent authorities.
- 1.2 The labour market information is supplied by Strathclyde Labour Market Information Monitoring Service (SLIMS), which is a not-for-profit company. The constituent authorities of the Joint Committee, and the Joint Committee itself, are partners in SLIMS.
- 1.3 The eight constituent authorities of the Joint Committee annually undertake an audit of sites and the take-up of land for industry and business in their areas. In carrying out this work the authorities work to previously agreed definitions, and to a base date of 31 March. This approach ensures consistency and compatibility of data across the Structure Plan area which in turn allows the collation and analysis of the data by the Joint Committee at the Structure Plan level and at other levels.
- 1.4 In previous years information collected annually regarding the marketable/specialised industrial land supply fed directly into the Employment Sites Register (ESR). This information was passed to the Scottish Executive Development Department as the ESR return by each Authority. The Scottish Executive, however, has not requested the ESR returns from authorities in recent years.

2.0 Structure Plan Policy Context

- 2.1 The Glasgow and the Clyde Valley Structure Plan 2000 (the approved Structure Plan) seeks to maintain and enhance the competitive position of the Glasgow and the Clyde Valley area, attracting industrial and business investment through the Competitive Economic Framework. This Framework harnesses the competitive advantages of the area and its infrastructure, and is set out through Strategic Policy 5. This policy identifies Strategic Business Centres (SBCs), Strategic Industrial and Business Locations (SIBLs), Core Economic Development Areas (CEDAs), Nationally Safeguarded Inward Investment Locations, Tourism Development Areas (TDAs), and International Transport Facilities. Schedule 5 of the 2000 Plan is provided in Annex 1.
- 2.2 The growth of service industries, offices, education, tourism, and culture related facilities are promoted by establishing SBCs in appropriate large town centres, in order to complement the economic base provided by Glasgow City Centre. The most marketable strategic industrial and business locations are safeguarded as SIBLs and are given priority in terms of industrial, business, infrastructure and ancillary uses investment. In order to facilitate a higher rate of economic activity in areas which have experienced employment loss and property falling out of economic use, up to 400 hectares of additional development on brownfield sites is sought within CEDAs. Some CEDAs overlap with some SIBLs. In order to meet national requirements to accommodate large scale inward investment, a range of large nationally safeguarded inward investment locations are identified and protected from inappropriate development. In view of the importance of tourism to the area, those parts of the area where tourism would support the Structure Plan strategy have been identified as TDAs. Finally, the capacity of export based industries is supported and safeguarded through the identification of International Transport Facilities.

- 2.3 In addition to the Competitive Economic Framework, the Structure Plan also seeks to ensure that there is an appropriate quantity, quality and distribution of land to accommodate all types of proposal which may emerge. The approved Structure Plan therefore requires a ten year supply of marketable and serviceable land for business and industry, which includes a five year supply of readily available marketable sites.
- 2.4 In order to improve the distribution of employment opportunities in the area, the approved Structure Plan seeks to enhance access to employment locations from both the Priority Areas and the suburban areas. This approach is complemented by the provision of opportunities for local industrial/business developments of limited scale, in appropriate areas, through local plans, while also guarding against the potentially blighting effect of excessive land allocations.
- 2.5 The Shared Targets of the approved Structure Plan seek an increase in the rate of economic development over the Plan period, thereby requiring the identification of additional development opportunities, as indicated in Table 1.

Table 1 Shared Targets 2000 Structure Plan		
Shared Targets for Increasing Economic Growth	Economic performance closer to the national average by 2020 with the area no longer experiencing population loss through out migration. This will require the provision of an estimated 200ha of industrial and business land in addition to the established marketable land supply	
	A further 200ha of land will be provided in brownfield locations in existing employment areas to reduce the need for expanding firms to relocate away from their existing locality	
Shared Targets for Promoting Social Inclusion	Encouraging up to 400ha of additional new industrial and business development at locations which will improve access to jobs from the priority areas ¹ .	
	Improving the range of local employment opportunities in suburban towns and rural villages.	
Past and Planned Scale of Economic Development	1987-1997	600ha
	1999-2010	695ha
	2010-2020	750ha

¹ 400ha is reference to combined hectare target in Shared targets for Increasing Economic Growth.

3.0 Unemployment in the Glasgow and the Clyde Valley Structure Plan Area

Changes to ONS Unemployment Statistics

- 3.1 Claimant Rate/Claimant Proportion: In January 2003, the Office for National Statistics (ONS) introduced changes to how unemployment information is calculated and presented. The main effect of the changes is to replace the 'Claimant Rate' with the Claimant Proportion'. It was considered that the Rate could be misleading because it could overstate or understate the level of unemployment in an area due to commuting. This is possible because the rate was calculated using the number of people working in an area, regardless of where they lived. Claimant rates are therefore lower in areas where there are a lot of commuters, such as city centres. As the workforce was calculated from a combination of sample surveys and other sources, the rate based on this information was considered unreliable due to the level of errors possible. The Claimant Count, which is one of several data sources which together provide workforce data, has itself lost confidence as a measure as it is based on those eligible for particular benefits and excludes those who are looking for work, but are not eligible for those benefits. The Claimant Rate will still be available from ONS however, so there is the potential for confusion between it and the Claimant Proportion.
- 3.2 The 'Claimant Proportion' overcomes the difficulties with the Claimant Rate because it is residence based. It is based on the local working age population, which is 16-59 years for females and 16-64 years for males. It should, however, be seen as one indicator of unemployment, not a replacement for all others. At the Council level, when compared to the Claimant Rate, the residence based Claimant Proportion is lower in all authorities in the Structure Plan area except for Glasgow, where it is higher. This reflects the fact that Glasgow's working age population is less than its workforce.
- 3.4 This change brings the ONS methodology into line with that of SLIMS who have used a residence based rate in calculating the proportion for the last 5 years.

Unemployment Levels

- 3.5 In 1998, the UK Government began to use International Labour Office (ILO) unemployment as the main official measure of joblessness. This measure is used throughout the European Union and is a more comprehensive measure than the Claimant Count as it is based on whether people are unemployed and looking for work, not just whether they receive a particular kind of benefit. The difficulty with ILO unemployment is that it is derived from the results of the Labour Force Survey. This has a big enough sample to provide reliable results for Britain, and Scotland as a whole. The figures for Glasgow and the Clyde Valley area are also considered to be dependable. For smaller areas within the Structure Plan area, however, the margins of error for unemployment estimates can be substantial. As part of the changes introduced by ONS in January 2003 it will be renamed 'Unemployment' as it will be the only official measure of unemployment in the UK. For small areas the Local Authority Database of the Labour Force Survey is a better estimate as it uses data from a full year rather than being based on quarterly results.

	2003	2004	% point change
Glasgow and Clyde Valley	58,600	50,300	-14%
Scotland	143,300	134,600	-6%
UK	1,429,000	1,376,200	-4%

Source: Annual Population Survey and LAD, LFS

- 3.6 Table 2 shows that the unemployment rate for the UK has decreased since 2003. Glasgow and the Clyde Valley has a higher rate of unemployment than Scotland and the UK, but it has also experienced a higher percentage point decrease in unemployment.
- 3.7 The Claimant Count series measures all persons claiming Jobseeker's Allowance. The figures are compiled by the employment service and released in conjunction with the Office for National Statistics (ONS). The Claimant Count remains the only comprehensive series available at small area level. Despite its inadequacies, the Claimant Count measure remains a valuable indicator as it allows direct unemployment comparisons between areas.

Table 3 - Claimant Count March 2003-2004				
	2003		2004	
	Total	Proportion	Total	Proportion
East Dunbartonshire	1,316	2.0	1,177	1.8
East Renfrewshire	961	1.8	937	1.7
Glasgow City	17,527	4.7	17,034	4.5
Inverclyde	2,719	5.3	2,598	5.1
North Lanarkshire	7,571	3.7	7,096	3.5
Renfrewshire	3,985	3.7	3,804	3.6
South Lanarkshire	5,632	3.0	5,214	2.7
West Dunbartonshire	2,791	4.9	2,608	4.5
Glasgow and Clyde Valley	42,502	3.9	40,468	3.7
Source : SLIMS				

- 3.8 Table 3 shows that there was a decline in the absolute claimant count from 2003-2004 in the Structure Plan area and in all the individual authorities. Inverclyde, Glasgow City and West Dunbartonshire have the highest rates, while East Dunbartonshire and East Renfrewshire have the lowest. This reflects similar patterns in previous years.

4.0 Employment in the Glasgow and the Clyde Valley Structure Plan Area

4.1 Employment data in this monitoring report was obtained from the Strathclyde Labour Market Information Monitoring Service (SLIMS). The main data source used by SLIMS was the Annual Business Inquiry on which a forecast was run by Cambridge Econometrics. The forecast indicates what could happen in the next few years if trends continue.

2004 - 2010 Employment Forecasts

4.2 As can be seen from Table 4, the forecasts suggest a growth in employment in the Structure Plan area to 2010, with 23,500 additional full time, part time and self employment jobs. This overall growth of 3% masks a decline in full time jobs, particularly male full time jobs. There is, however, expected to be a significant growth in male part time jobs. The rate of self employment is expected to grow faster than the overall rate of employment.

	Total Employment 2004	Total Employment 2010	Change 2004-2010	% change
Male Full Time	321,700	317,800	-3,800	-1%
Female Full Time	215,600	216,400	900	0
All full time	537,300	534,200	-3,100	-1%
Male Part Time	51,700	59,100	7,300	14%
Female Part Time	187,500	201,900	14,200	8%
All part time	239,200	261,000	21,800	9%
Self Employed	69,500	74,500	5,100	7%
Total	846,200	869,700	23,500	3%
Source : SLIMS				
Note: figures may not sum due to rounding				

4.3 The forecast increase in employment levels provides support to the Structure Plan shared target of increasing economic growth. The Structure Plan recognises that the identification of appropriate land, and particularly vacant or derelict land, is a key factor in achieving this target.

4.4 Table 5 provides a useful insight into which occupations will grow and which will decline in the Structure Plan area in the period 2004-2010. This analysis by occupational groupings indicates which particular job types will be in demand in the future, rather than the industry where they might be based. The 2004 estimates for the Structure Plan area show that administration and secretarial is the largest single group, with associate professional and technical the second largest and professional the third largest. This position does not change in the 2010 forecast, but while administration and secretarial will experience some growth, both associate professional and technical, and professional are forecast as being the largest growing groups. These types of jobs are often undertaken in office environments and therefore if the forecast is similar in future, there may be a need to consider the level of land required for business and office developments to cater for the increase, particularly in Strategic Business Centres and Strategic Industrial and Business Locations. In doing this the role of recycling vacant land or refurbishing redundant buildings can be important. This must be tempered by considering the existing supply of office and business land supply and floorspace.

	2004	2010	2004-2010 Change	% Change
Managers & Senior Officials	102,200	99,400	-2,700	-2%
Professional	98,000	108,400	10,600	10.8%
Associate Professional & Technical	125,600	131,700	6,100	4.9%
Admin & Secretarial	120,600	127,100	6,500	5.4%
Skilled Trades	83,700	78,700	-4,900	-5.9%
Personal Service	60,800	67,000	6,200	10.2%
Sales & Customer Service	79,400	79,900	600	0.8%
Process, Plant & Machine operatives	75,600	74,500	-1,100	-1.5%
Unskilled Manual	100,900	102,800	2,100	2.1%
Total	846,200	866,800	23,500	2.8%

Source: SLIMS Employment Forecasts/ Regional Forecasts
Note: figures may not sum due to rounding

4.5 Table 5 also indicates that the skilled trades and the process, plant & machine operatives will be those which decline the most. These jobs are often related to manufacturing and traditional industries and Table 6 shows that these sectors are forecast to decline. Table 5 also indicates that the professions, public services and other services will be the growing sectors, which might imply a requirement for further business premises. Care must be taken in interpreting the data in this way, however, as no analysis of existing business floorspace and the demand for it is included. The Joint Committee has however undertaken a survey of commercial floorspace in the Structure Plan area and analysis of this is contained in Technical Report TR 4/05 '2001 Survey of New Industrial and Business Floorspace'.

Sector	2004 estimate	2010 forecast	% Change 2004 - 2010
Agriculture Primary	3,900	3,500	-10%
Utilities	7,700	6,600	-14%
Manufacturing	85,400	71,400	-16%
Construction	61,600	63,300	3%
Retail, Distribution, Hotels & Catering, etc	189,900	188,400	-1%
Transport & Communications	60,900	64,600	6%
Financial /Professional/Computing Services	154,100	179,100	16%
Public Services, Admin, Education & Health	231,200	240,300	4%
Other Services	51,700	53,000	3%
TOTAL	846,200	869,700	2.8%

Source : SLIMS (rounded figures)

5.0 Industrial and Business Land Supply in the Glasgow and the Clyde Valley Structure Plan Area

5.1 The industry and business land supply is not homogenous, in that it comprises a wide range of sites of varying sizes, quality and locations. This report examines the land supply within the following groupings Marketable Land Supply, Quality Land Supply, Non Marketable Land Supply and Specialised Sites, as recorded. A detailed description of the various elements of the land supply is contained in Annex 2.

Marketable Industrial and Business Land Supply

5.2 Table 7 indicates the changes within the marketable land supply in the Structure Plan area in recent years. The detailed definition of the marketable land supply is set out in Annex 2.

Year	Brownfield	Greenfield	Mixed	% Brownfield	Total
1996	699	574	0	55	1,273
1997	522	726	0	58	1,248
1998	767	471	0	62	1,238
1999	766	477	0	62	1,243
2000	718	515	0	58	1,233
2001	684	497	8	58	1,189
2002	587	432	8	57	1,027
2003	548	431	7	56	986
2004	531	447	7	52	1015

5.3 Table 7 indicates that the overall trend in the marketable land supply is one of a gradual decrease between 1996 and 2004, with the 2004 level being 258 hectares less than the 1996 level. Within this downward trend there was a small increase in 1999 compared to 1998, and in 2004 there was also an increase, of 29 hectares, in the marketable land supply. The downward trend could be the result of a combination of circumstances such as sites being developed for industry or business, or developed for other purposes. It is also a result of reviews of the land supply which reduce the level of land identified for industry and business by reallocating sites for other uses, for example housing.

5.4 Table 7 also shows that between 1996 and 1999 the proportion of marketable brownfield sites identified increased, from 55% to 62%. Since 1999, however, the proportion of brownfield sites in the supply has decreased. Over the same period, take up (see Table 12) has occurred mainly on brownfield sites, in line with Structure Plan policy, and this has been a contributory factor in the decline of the brownfield element of the marketable land supply.

Core Economic Development Areas

5.5 The shared Targets and Guiding Principles for Sustainable development within the approved Structure Plan identify the level of change which was planned for by 2020. The Shared Target for Promoting Social Inclusion seeks to support the Priority Areas in particular, by focusing strategic action towards improving living standards. In doing so it recognises the importance of improving access to employment opportunities. It encourages up to 400 hectares of additional new industrial and business development at locations which will improve access to jobs from the Priority Areas. Progress toward this target is discussed in Section 9.

- 5.6 The approved Structure Plan promotes CEDAs in order to achieve the higher rate of economic activity sought by 2020, and to provide brownfield development opportunities which are better related to the workforce and the public transport system, thereby reducing the tendency for firms to move from core to peripheral areas. Table 8 shows the marketable land supply within the CEDAs in 2003 and 2004.

Table 8 Marketable Land Supply (Ha) in CEDAs		
	2003	2004
Govan	39.7	41.1
North Clyde	3.8	5.9
Glasgow East End	59.1	57.3
Glasgow North	40.2	40.1
Inverclyde Waterfront	9.1	6.9
Ravenscraig	0	0
Airdrie/ Coatbridge	5.1	4.8
Gartcosh	41.7	41.7
Paisley North	70.6	73.6
Renfrew	66.4	65.4
Cambuslang/ Rutherglen	80.3	57.5
Clydebank Waterfront	28.8	32.1
Dumbarton	0	0
Glasgow and Clyde Valley	444.8	426.4

- 5.7 Table 8 shows that the level of marketable land within the CEDAs declined by 31 hectares in 2004, when compared to 2003. When viewed in conjunction with Table 7 it can be seen that 41% of all marketable land in the Structure Plan area currently falls within the core areas (CEDAs). This evidence indicates that there are development opportunities in areas which are accessible to priority areas of social need.

Strategic Industrial and Business Locations (SIBLs)

- 5.8 The Structure Plan identifies and safeguards the most marketable industrial and business locations, which are crucial to the competitiveness of the area, as Strategic Industrial and Business Locations (SIBLs). Given their importance, these locations are afforded priority in terms of industrial, business and infrastructure investment and ancillary uses, and the maximum protection from unrelated non-industrial uses. Table 9 shows the marketable land supply within the SIBLs, within each authority. Some of the SIBLs overlap with the CEDAs, such as those at Clydebank Business Park, Pacific Quay, Cambuslang, Hillington Industrial Estate and Gartcosh. Caution has therefore to be exercised when comparing Tables 7, 8 and 9.

	2003	2004
East Dunbartonshire	10.7	24.8
Glasgow City	148.8	143.3
Inverclyde	6	6
North Lanarkshire	223.1	212.4
Renfrewshire	118.2	111.6
South Lanarkshire	82.3	82.4
West Dunbartonshire	15.2	11.1
Glasgow and Clyde Valley	604.3	591.6

Note: There are no SIBLs in East Renfrewshire

5.9 As can be seen from Table 9, there has been a fall of 12.7 hectares in the level of marketable land within SIBLs. A comparison with Table 7 indicates that in 2003, 61% of the marketable land supply fell within SIBLs, and 58% in 2004, indicating that most of the marketable industrial and business land continues to fall within safeguarded locations.

Quality Industrial and Business Land Supply

5.10 The quality land supply is that element of the marketable industrial and business land supply which is assessed as offering a good environment, good access to the strategic transport network, and a high degree of flexibility in terms of the range of different user requirements which it can accommodate. The quality land supply is confirmed with the Scottish Enterprise network through liaison meetings every three years, and as a result the 2003 land supply has been agreed with the Scottish Enterprise network. The 2004 supply has not been assessed by the LECs, but it has been identified by the authorities using the agreed criteria. The results for 2003 and 2004 are indicated in Table 10.

LEC Area	Quality* (ha)		Potential Quality** (ha)		Total Marketable (ha)		% of Marketable Supply which is Quality		% of Marketable Requiring upgrading to Quality	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
S.E. Dunbartonshire	15.9	11.8	49.4	68.1	83.8	99.7	19	12	59	68
S.E. Glasgow	173.8	172.4	53.8	53.8	244.8	243.7	71	71	22	22
S.E. Lanarkshire	286.5	325.5	81.4	56.5	434.2	446.6	66	73	19	13
S.E. Renfrewshire	127.4	120.8	52.4	50.2	223.8	225.8	54	54	24	23
Glasgow and Clyde Valley	603.6	630.5	237	228.6	986.6	1015.8	61	62	24	23

Note: The SE Glasgow area includes Cambuslang Investment Park which is within the South Lanarkshire Council area

5.11 In 2004, 62% of the marketable land supply in the Structure Plan area was assessed as being 'quality' land. This represents a slight increase over the 2003 position, when 61% of the marketable supply was classed as 'quality' land. This increase is largely the result of a 35ha site at Lesmahagow being added to the quality supply. While the supply of quality sites increased, the level of potential quality supply has decreased slightly by 8.3 hectares.

5.12 Table 11 highlights that the quality land supply in North and South Lanarkshire and in Glasgow forms around 70% of the marketable land supply, indicating that a high proportion of the land supply is accessible, flexible, and offers a good environment.

Table 11 - Quality Supply (Ha) by Local Authority Area 2004						
	Quality* (ha)	Potential Quality** (ha)	Other Marketable (ha)	Total Marketable (ha)	% of Marketable Supply which is Quality	% of Marketable which is Potential Quality
East Dunbartonshire	0	32.7	8.1	40.9	0	80
East Renfrewshire	8.5	0	25.2	33.7	25	0
Glasgow City	156.5	53.8	17.5	227.8	69	24
Inverclyde	5.7	6.9	3.6	16.2	35	43
North Lanarkshire	189.2	13.8	44.3	247.3	76	6
Renfrewshire	106.7	43.3	25.9	175.9	61	25
South Lanarkshire	152.3	42.7	20.2	215.2	71	20
West Dunbartonshire	11.8	35.4	11.6	58.8	20	60
Glasgow and Clyde Valley	630.7	228.6	156.4	1015.8	62	22
* Quality - that part of the marketable supply assigned as having a good environment, good access to the strategic road network, and a high degree of flexibility. ** Potential Quality - That element of the Marketable Supply that has the capacity to be upgraded to Quality						

6.0 Annual Take Up of Land for Industry and Business

- 6.1 The eight constituent authorities monitor all known industrial and business developments (Classes 4, 5 and 6) which take place annually between 1st April and 31st March. The primary sources of information are planning applications and site surveys. Annex 3 explains the Industrial and Business Development (Take-Up/Demand) Considerations.
- 6.2 While the historic take-up trend gives a useful indicator of potential future demand, when considered alone it does not provide a comprehensive picture of future demand. Structure Plan policies have sought to provide for a higher rate of development than would be required merely by trends. This is particularly relevant in areas such as the Core Economic Development Areas, where the Structure Plan encourages future levels of development that may be greater than the historical trend.

Year	Greenfield	Brownfield	% Brownfield	Total Take up
1996/97	50.6	54.7	52	105.3
1997/98	15.9	44.8	74	60.7
1998/99	29.7	39.8	57	69.5
1999/2000	21.7	40.1	65	61.8
2000/01	14.9	46.3	75	61.3
2001/02	9.1	24.2	73	33.3
2002/03	41	47.8	54	88.8
2003/04	12.2	23.3	66	35.5

Note: Figures exclude significant inward investments occurring on specialized sites: 1996/97 – First Direct, South Lanarkshire (10 ha, greenfield); 1999/00 – Faulds Park, Inverclyde (1.46 ha, greenfield); 2002/03 – Faulds Park, Inverclyde (3.25 ha greenfield)

- 6.3 Table 12 indicates the recent take-up levels in the Structure Plan area. While the general trend is decreasing take up levels, with the highest level experienced in 1996/97 and the lowest in 2003/04, this masks a much more complicated picture. Following a dramatic drop in 1997/98, a period of relative stability occurred until 2001/02, when there was another significant drop in take up. Since then the level has fluctuated. The average annual take-up in 2001/02 - 2002/03 was 61.5 hectares, which is consistent with those experienced in the 1997/98 - 2000/01 period. This suggests there may have been delays in implementing some developments in 2001/02, which have subsequently appeared in the 2002/03 assessment. This may also explain the 2003/04 figure, but the 2004/05 figure will be required to assess this.
- 6.4 It can also be seen from Table 12 that, while the proportion of brownfield development has fluctuated, it has none the less consistently been 57% or higher since 1997/98, with the exception of 2002/03 when it was 54%. 2002/03 saw a historically high level of greenfield take-up, which can largely be accounted for by the 15.7 hectare Class 5 development at Inchinnan. This development was in the Inchinnan Strategic Industrial and Business location and accorded with the Structure Plan. It is the impact of this large greenfield development which resulted in a relatively low proportion of brownfield take-up in 2002/03, and not a reduction in the actual level of brownfield take-up, which was at a historically high level.
- 6.5 Table 13 shows that in 2003/04 significant fall off in the level of take up was experienced in Renfrewshire, Glasgow and North Lanarkshire Council areas. During 2002/03 Renfrewshire experienced more take-up than any other authority. This was largely the result of the 15.7 hectare development in the Inchinnan SIBL. While there was a significant drop in the level of take up during 2003/04, this was accompanied by a significant increase in the proportion of brownfield take up when compared to 2002/03.

Table 13 Take up of Land For Industry and Business (Ha) April 1 2002 – 31 March 2004						
	Greenfield		Brownfield		Total	
	2002/03	2003/04	2002/03	2003/04	2002/03	2003/04
East Dunbartonshire	0	0.1	2.9	0.1	2.9	0.3
East Renfrewshire	0	0	0.5	2.1	0.5	2.1
Glasgow City	6.7	1.9	16.8	11.2	23.5	13.0
Inverclyde	3.2	0	1.2	0	4.5	0
North Lanarkshire	8.4	4.1	5.3	0.6	13.6	4.7
Renfrewshire	18.5	0.8	8.9	1.5	27.4	2.3
South Lanarkshire	3.6	0	6.6	7.8	10.2	7.7
West Dunbartonshire	0.6	1.6	5.2	0.1	5.8	1.7
Glasgow and Clyde Valley	41.0	8.5	47.4	23.4	88.4	31.8

Take up within SIBLs

- 6.6 During 2003/04 there was a significant drop off in the level of take up within the SIBLs (See Table 14). This is particularly noticeable in Renfrewshire, where the decline can be largely accounted for by the 15.7 ha Class 5 development at Inchinnan. There has also been a noticeable decrease in take up within the Hillington/Cardonald and Cambuslang Investment Park SIBLs within Glasgow (see Annex 4 for Take Up by SIBL).

Table 14 Take up Within Strategic Industrial and Business Locations (SIBLs)		
	2002/03	2003/04
East Dunbartonshire	0	0
Glasgow City	10.2	3.5
Inverclyde	0	0
North Lanarkshire	4.3	4.1
Renfrewshire	25.5	2.2
South Lanarkshire	2.6	0
West Dunbartonshire	0	0
Glasgow and Clyde Valley	42.6	9.8
Note: there are no SIBLs in East Renfrewshire		

7.0 Comparison of Supply and Demand

- 7.1 Table 15 shows a breakdown of the 2003 and 2004 marketable land supply and provides a 10 year picture of supply based on double the level of take-up in the last 5 years. This approach to measuring take-up (demand) ensures that the most recent development trends are recognised.

Table 15 Industry and Business Land Supply (Ha) as at 31 March 2003 and 2004				
	Marketable Supply		10 Year Demand (last 5 years x2)	
	2003	2004	2003	2004
East Dunbartonshire	42.4	40.9	14.2	13.5
East Renfrewshire	33.6	33.7	2.9	6.2
Glasgow City	228.9	227.8	171.3	158.5
Inverclyde	18.3	16.2	22.4	9.4
North Lanarkshire	252.6	247.3	134.9	112.5
Renfrewshire	171.8	175.9	142.4	111.3
South Lanarkshire	197.5	215.2	119.1	122.3
West Dunbartonshire	41.4	58.8	16.9	18.1
Glasgow & Clyde Valley	986.5	1015.8	624.1	551.8

- 7.2 In 2003 in the Structure Plan area there was around 16 years supply of marketable land, and based on the 10 year demand figure indicated in Table 15, in 2004 there was an 18 year supply. The approved Structure Plan requirement for a minimum 10 year potential bank of marketable and serviceable land for industry and business therefore continues to be met.

Nationally Safeguarded Inward Investment Locations

- 7.3 At the time of the publication of the Structure Plan in 2000, Scottish Executive policy sought to accommodate large scale inward investment into the Structure Plan area through the identification and safeguarding of a number of large single user high amenity sites (SUHAS), at least one medium sized industrial site of 10-30 hectares, and a major industrial and business site of at 100 hectares or more. Through Strategic Policy 5 and the related Schedule 5(d), the approved Structure Plan fulfilled the requirements of national policy, by identifying a range of confirmed and potential SUHAS and two medium industrial sites. The approved Structure Plan makes no provision for a major site. In November 2002 national policy requirement relating to nationally safeguarded inward investment locations was updated through Scottish Planning Policy 2 Economic Development (SPP2).
- 7.4 SPP2 recognises that the type and nature of inward investment has changed since the identification of high amenity sites. The policy focus has therefore altered, allowing a more flexible approach to the use and possible sub-division of some of the existing single user sites, in order to meet the requirements of other industrial sectors and activities, including software and biotechnology. It also acknowledges that in light of the trend towards higher value, smaller scale manufacturing projects, no additional sites are

required in the national interest for large scale manufacturing. The sites in the 2000 Plan have been assessed jointly by the local councils and the Enterprise Network in anticipation of the changes in national planning guidance. The results of this study were approved by the Joint Committee in June 2002 (see Annex 5).

- 7.5 The policy approach in SPP2 requires the confirmed (Proven) sites in the Structure Plan area listed in Table 16 continue to be safeguarded. The Woodhall/Faskine and Pollok Ryatt sites are reserved for Class 4 business developments only. Scottish Enterprise will keep the provision under review in order to ensure the supply is responsive to market conditions.

Table 16 Nationally Safeguarded High Amenity Locations (SPP2)
Langlands West, East Kilbride Robroyston South, Glasgow (2 sites) Woodhall/Faskine, North Lanarkshire * Raith Interchange, South Lanarkshire Pollok Ryatt, East Renfrewshire *
*Reserved for Class 4 development

- 7.6 The potential SUHAS, the substantially or wholly developed SUHAS and the medium sized industrial sites identified in the 2000 Plan do not appear in the list of nationally safeguarded high amenity locations in SPP2. The potential SUHAS at Darnley Mains, Glasgow will, however, be retained in the 2006 Structure Plan as a regionally important high amenity location. Gartcosh and Ravenscraig will also be safeguarded as regionally important high amenity locations. Erskine will continue to be recognised in the 2006 Plan as a developed high amenity location.

8.0 Tourism

- 8.1 Tourism is recognised as a growth sector and the Structure Plan recognises that growth relates primarily to four main areas - industrial heritage, scenery, arts and cultural attractions, and sports and leisure facilities. The 2000 Structure Plan identifies Tourism Development Areas (TDAs) where tourist related developments would be supportive of the strategy. TDAs are being implemented through Local Plans, and the Joint Committee is monitoring hotel developments due to their role in tourism and economic development.
- 8.2 The Millennium Link project restored navigation to the Forth & Clyde and the Union Canals, and was formally opened in May 2002. The Structure Plan recognises the Forth & Clyde Canal as a Metropolitan Flagship Initiative and a corridor TDA. The Link contributes to the Structure Plan's Green Network and, as it passes through several Council areas, it attracts tourists and related economic benefits to these areas. British Waterways Scotland (BWS) have produced a 'Post Construction Monitoring Report, 2003' which allows an assessment of the developments within the Canal corridor to be made. Similar assessments of developments within other TDAs have not been undertaken at this time.
- 8.3 BWS recognise that in many cases there is no precise way of determining whether or not a development close to the canal system has been stimulated by the Millennium Link project. The BWS Report and Table 18 below concentrate on key sites known to BWS and the local authorities where there is some direct or indirect relationship to the canal. It should be noted that there are proposals which are not under construction or do not have planning consent and are therefore not included in Table 17.
- 8.4 As can be seen, 7 key projects have been completed since 1999 and another was under construction at February 2003, providing a range of development types. The employment figures given are estimated where the scale of development is given. Table 18 indicates that there are 430 jobs associated with construction and operation of the developments (before displacement). It also shows the generally low levels associated with construction, compared to the large number of jobs related to the industrial development at Anniesland.

Table 17 Millennium Link Key Development Sites					
LA	Location	Type of Development	Completed since 1999	Under Construction	Estimated Employment
WD	Bowling Basin	Ph1- Marina, Ph2 -90 houses, hotel & restaurant refurbishment of customs house and railway arches	Ph1 - Yes	Ph2 - No	6 FTE Construction
	Clyde Shopping Centre	Mall refurbishment and extension	yes		22 FTE construction
CG	Anniesland	Fitness Centre and 273 houses. Industrial new build and refurbishment	Yes	Yes - industry	12 360
	Lock 27	Pub extension and environmental improvement		Yes	
	Firhill Basin	Student flats, Firhill sports stand. Housing north of Foundry, other housing, office space	Yes	No	
	Lambhill Stables	Environmental enhancement Business space 1,300 sq m	Yes		
ED	Glasgow Rd, Kirkintilloch	Extension to Stables pub/restaurant	Yes		
	Southbank, Kirkintilloch	Residential/ office/ retail/ arts & learning centre, new basin, moorings/marina & environmental works	Learning Centre		30 at learning centre
Development status as at February 2003 Source: BWS report 'The Millennium Link: Post Construction Monitoring, Final Report, June 2003'					

9.0 Progress toward Shared Targets

9.1 The Shared Targets of the 2000 Plan that relate to industrial and business development are set out in Table 1. Progress toward these targets can be monitored through the information provided by the annual monitoring.

Economic Performance

9.2 GVA is a useful indicator of economic performance. Figures produced by the Office of National Statistics for 2002 are shown in Table 18. The metropolitan area has performed better than Scotland as a whole since the mid 1990s, in that the national level of GVA per head has fallen in relation to the UK average, whereas the figure for Glasgow and the Clyde Valley has kept up with the UK and even grown slightly faster since 1999.

Area*	GVA per head	
	£	Index (UK=100)
Dunbartonshire LEC	9,200	61
Glasgow	20,600	135
Renfrewshire LEC	13,600	89
North Lanarkshire	11,100	73
South Lanarkshire	12,500	82
Glasgow and Clyde Valley	14,700	96
Scotland	14,700	96
UK	15,300	100

*These areas are those used by the EU for statistical comparisons (NUTS areas)

400 Hectare Target

9.3 The 2000 Plan establishes the target of providing up to 400ha additional brownfield development opportunities for industry and business in the Core Economic Development Areas. The 400ha target is broken down into two parts: (1) 200ha to support improved economic performance and (2) 200ha in existing employment areas to reduce the need for expanding firms to relocate.

9.4 Progress toward the 400ha target is measured using the land supply monitoring data provided by the constituent authorities. Both new sites added to the land supply and take up of land for industrial and business development in CEDAs are assessed. Between 1999 (the base year of the approved Structure Plan) and 2004, there have been 149 hectares of new land identified for industrial and business uses within CEDAs, and 122 hectares of take up, indicating progress towards meeting the 400 hectare target has been made in the last 5 years.

Local Employment Opportunities

9.5 The Shared Targets promote improving the range of local employment opportunities in suburban towns and rural villages. The 2000 Plan required Local Plans to identify local employment opportunities in the following locations: Airdrie/ Coatbridge; Barrhead; Castlemilk; Drumchapel; Dumbarton; Easterhouse; Hamilton; Kirkintilloch; Pollok; Port Glasgow; Rutherglen; Bearsden; Lenzie; Milngavie; Newton Mearns; Stonehouse; and Strathaven. These opportunities have been identified in Local Plans to date, except Airdrie/ Coatbridge, Dumbarton/ Vale of Leven, Hamilton, Kirkintilloch, Port Glasgow, Bearsden, Lenzie and Milngavie.

Planned Scale of Economic Development

- 9.6 The 2000 Plan identified a planned scale of economic development of 695 hectares between 1999 and 2010. Progress towards this target is measured through take-up of land for industrial and business uses. Between 1999 and 2004, 281 hectares of land have been developed for industrial and business uses (see Table 12). This represents progress towards the target with an average annual take up of 56 hectares. However, if take up continues at this level, the target of 695ha by 2010 will not be met.

10.0 Conclusions

10.1 The following conclusions for the Structure Plan area have been drawn from the analysis of the data presented in this report:

Employment

- Unemployment is decreasing;
- Employment forecast to grow in the 2004 - 2010 period;
- Male and female part-time working are forecast to increase in the 2004 - 2010 period;
- Associate professional & technical, and professional occupations are forecast to increase more than any other occupation groups in the 2004 - 2010 period;
- Skilled trades, and process, plant & machine operative occupations are forecast to decline most in the 2004 - 2010 period;

Industrial and Business Land Supply, and Take-up

- The trend in the marketable land supply is downward, but there was a small rise in the 2004 level;
- 41% of marketable sites are in CEDAs, indicating there are a significant level of development opportunities in areas which are accessible to priority areas;
- Most of the marketable industrial land continues to fall within SIBLS;
- A 35 hectare site at Lesmahagow has made a major contribution to an increase in the level of the quality land supply in 2004;
- Following a period of stability, take up rates have fluctuated in recent years;
- Take up in SIBLS has dropped significantly in 2004;
- The approved Structure Plan requirement to maintain a minimum 10 years potential bank of marketable and serviceable land for industry and business has been fulfilled in 2004;
- The requirement for SUHAS has changed, with only confirmed (proven) sites requiring to be safeguarded. The potential SUHAS at Darnley Mains and industrial sites at Gartcosh and Ravenscraig will be added to the list of safeguarded locations;
- 7 key projects relating to the Millennium Link Metropolitan Flagship Initiative have been completed since 1999.

Annex 1

Approved Glasgow and Clyde Valley Joint Structure Plan 2000 – Schedule 5

Schedule 5(a) Strategic Business Centres

Glasgow City Centre	Greenock
Clydebank	Hamilton
Cumbernauld	Motherwell
Dumbarton	Paisley
East Kilbride	

Schedule 5(b) Strategic Industrial and Business Locations

Blantyre/ Whistleberry	Barrhead
Cambuslang	Cartsburn
City Science/ College Business Park	Clydebank Business Park
Clyde Gateway (Glasgow and Shawfield/ Farme Cross)	
Cumbernauld NW	Darnley Mains
East Kilbride South and West	Erskine Riverfront
Faulds Park	Gartcosh
Glasgow Business Park	Greenock/ Port Glasgow (Riverside)
Hillington/ Cardonald	Inchinnan
Lanarkshire EZ (various sites)	Larkhall South
Linwood	Newhouse/ Eurocentral
Newhouse West	Queenslie
Pacific Quay	Ravenscraig
Righead/ Bellshill/ Strathclyde Business Park	Robroyston
Vale of Leven IE	West of Scotland Science Park
Westerhill	Westway, Renfrew

Schedule 5(c) Core Economic Development Areas

Clyde Waterfront	Clydebank Waterfront Dumbarton Govan Inverclyde Waterfront North Clyde Renfrew
Clyde Gateway	Glasgow East End Cambuslang/ Rutherglen
Ravenscraig-Motherwell-Wishaw	
Other Locations	Airdrie/ Coatbridge Gartcosh Glasgow North Paisley North

Schedule 5(d) Safeguarded High Amenity Locations

(i) Nationally Safeguarded High Amenity Locations

Erskine
Langlands West
Pollok/Ryatt (restricted to Class 4)
Raith Interchange
Robroyston (2)
Woodhall – Faskine (restricted to Class 4)

(ii) Regionally Important

Darnley Mains
Gartcosh
Ravenscraig

Schedule 5(e) Tourism Development Areas

Campsies (potential Regional Park)
Clyde Muirshiel Regional Park
Forth and Clyde Canal Corridor
Glasgow and City Centre and Mid-Clyde Waterfront
Loch Lomond and the Trossachs National Park (Balloch)
Lower Clyde Estuary and Firth of Clyde
Paisley, Lanark and Biggar Centres
Strathclyde Park
Summerlee, Coatbridge
Upper Clyde Valley

Schedule 5(f) International Transport Facilities

Deanside Freight Terminal
Euro-freight Terminal (Mossend)
Gartsherrie Container Terminal
Glasgow International Airport
Great Harbour/ Inchgreen
King George V Dock
Ocean Terminal (Greenock)
Rothesay Dock

Schedule 5(g) University Campuses

Glasgow Caledonian University
Glasgow University
Paisley University
Strathclyde University

Annex 2

Industrial and Business Land Supply Categories

The industrial land supply is divided into the following categories:

- Category 1 Confirmed Marketable - sites with no servicing problems, in good locations with evidence of development and considered marketable by all parties.
- Category 2 Potential Marketable - sites which could be marketable but which require some improvement in terms of promotion, appearance or servicing.
- Category 3 Remain in Industry - Additional serviced sites in predominantly industrial areas, suitable for local, yardspace type developments.
- Category 4 Reserved Sites - sites held by firms for their own expansion and therefore not part of the general industrial land supply.
- Category 5 Review to Agriculture/Other use - sites that could be dezoned from industry and used for agriculture if not still in agricultural use.
- Category 6 Review for Environmental Improvement - sites with little potential for industry or other urban use but which if improved could aid amenity or open space aspects of surrounding areas.
- Category 7 Review to Housing Potential - sites that are surplus to requirements for industry, but which might form a useful addition to the stock of infill housing sites.
- Category 8 Marketable Sites in Rural Investment Areas
- Category 9 Review Sites in Rural Investment Areas
- Category 10 Specialised Sites-sites which are required by SPP2/NPPG 2 Industry and Business, for example major, medium industrial sites or Large High Amenity Single User sites.
- Category 11 Site developed for industry or business
- Category 12 Site developed for retail or commercial use
- Category 13 Site is no longer identified in the industry and business land supply
- Category 14 Land in use for industrial/business purposes but where no physical development has taken place

Categories 1, 2 and 8 constitute the **Marketable Land Supply**. Categories 3, 4, 5, 6, 7 and 9 constitute the **Non-Marketable Supply**, approximately half of this land is considered to be suitable for review to non industrial uses. Category 10 sites are reserved for specialised users and as such not part of the general supply. The **Quality Supply** consists of the element of Marketable supply which is considered to be of high environmental quality with good access and flexibility of use. **10 year Demand** is a projected figure based on the last 5 years take up of land for industry/business figure multiplied by 2 (see Table 10).

The industrial and business Land Supply is examined in the following groupings:

- A 'Marketable Supply': secure in terms of planning permission (including sites agreed in principle but not yet allocated within a development plan); and
- 2(i) fully serviced or where site servicing could be provided at short notice and where there is no significant obstacle to development. Such land should be available within one year; or
 - 2(ii) not yet serviced but where there is no special constraint on servicing capability or other obstacle to development. Such land will be available within one to five years or could be made available within one to five years; and
 - 3 connected to the strategic road/rail network with access existing or easy to arrange; and
 - 4 will normally be capable of accommodating a broad range of development without adverse environmental impact.
- (See Annex 1, Categories 1, 2 and 8 - this accords with the definition in SPP2/NPPG 2).
- B 'Quality Supply': (Subset of categories 1, 2 and 8)
That element of the marketable supply that has been assessed as having a good environment, good access to the strategic network and a high degree of flexibility.
- C 'Non Marketable Supply': (Categories 3, 4, 5, 6, 7 and 9)
Land zoned for industry that is not part of the marketable or potentially marketable supply, such as those sites reserved for a firm's expansion or sites suitable for local use for industry. This group also contains sites that have the potential for review, through the Local Plan process, to other uses such as housing or environmental improvement. In 2002 44% of the non-marketable land was considered appropriate for review to other uses and will therefore be removed from the industrial land supply on adoption of the relevant local plan.
- D 'Specialised Supply': (Category 10)
Those sites required by NPPG2 (now superseded by SSP2) to meet special needs and includes the large Single User High Amenity Sites and the Medium Industrial sites. SPP2 recognises that the type and nature of inward investment has changed since their identification, and as a result these sites should be able to meet the requirements of other industrial sectors and activities including software and biotechnology. Proven (confirmed) sites remain safeguarded in the approved Structure Plan.

Annex 3

Industrial and Business Development (Take-Up/Demand) Considerations

Assessment of demand for industrial and business land considers the following aspects:

- Scale of demand (take up levels)
- Size of site (hectares)
- Type of site (greenfield, brownfield, mixed site)

Each of the above variables is assessed by an annual survey and the results are presented in monitoring reports.

In general only development associated with new build is classed as take up (extensions are counted where they involve the development of new land outwith the existing curtilage of a business premises). The measurement taken is the perimeter of the development boundary; this may include directly associated car parking and landscaping. The historical record of take up within the Structure Plan area, produced by Strathclyde Regional Council, dates from the late seventies and this has been used to quantify, on a running previous ten years basis, projected demand for the next ten years. This data was collected using the same methodology as is used currently and as such provides a consistent historic data set for the whole Structure Plan area. The constituent Authorities of Glasgow and the Clyde Valley have provided the data since 1996/97. To ensure allowance is made for more recent trends, a ten year demand position based on the previous 5 years factored by two is calculated.

Annex 4

Take up Within Strategic Industrial and Business Locations (SIBLs)

	2002/03	2003/04
Westerhill	0	0
East Dunbartonshire	0	0
East Renfrewshire	0	0
City Science/College Business Park	0	0
Darnley Mains	0	0
Glasgow Business Park	1.83	1.17
Queenslie	0	0
Pacific Quay	0	0
Robroyston	0	0
Hillington/Cardonald	4.88	1.05
Cambuslang Investment Park	3.47	0.57
West of Scotland Science Park	0	0.7
Glasgow	10.18	3.49
Cartsburn/Greenock/Port Glasgow Riverside	0	0
Inverclyde	0	0
Cumbernauld	0	0
Gartcosh	0	0
Lanarkshire EZ	0	0
Newhouse/Eurocentral	4.26	3.12
Righead/Bellshill/Strathclyde Business Park	0	0.99
North Lanarkshire	4.26	4.11
Erskine Riverfront	0	0
Hillington	3.3	0.6
Inchinnan	16	0.9
Linwood	6.15	0.7
Westway	0	0
Renfrewshire	25.45	2.2
Blantyre	2.09	0
Whistleberry	0	0
Cambuslang	0	0
East Kilbride	0	0
West Kilbride	0	0
Larkhall South	0.54	0
South Lanarkshire	2.63	0
Clydebank	0	0
Vale of Leven Industrial	0	0
West Dunbartonshire	0	0
GCV Area	42.52	9.8

GLASGOW AND CLYDE VALLEY STRUCTURE PLAN

JOINT COMMITTEE MEETING

10th June 2002

Review of the Large Single User High Amenity Sites

Introduction

- 1 This report presents the findings of the Review of Large Single User High Amenity Sites undertaken by the constituent Local Authorities and the LEC network.

Background

- 2 In 1997, SEN/LiS established a need to bring forward Large Single User High Amenity Sites (LSUHAS). This resulted in the Alteration to the Structure Plan in 1999. As a response to a search for such sites, the Joint Committee promoted a rolling programme of sites in order to move away from a reactive approach to site searches. This approach allowed for renewal opportunities and not just reliance upon greenfield locations.
- 3 The current requirement for the review of the identified supply has arisen because of the lack of inquiries / demand for large single user sites. At the same time, the 'Smart Successful Scotland' agenda is promoting a move away from large scale inward investment which requires such sites, to the development of high quality indigenous business. Given the uncertainty regarding this matter, the issue regarding LSUHAS was raised at the Scottish Enterprise Liaison Group. It was agreed that a review of the LSUHAS, be undertaken in consultation with each LEC and relevant Local Authority.

Current Position

- 4 The Glasgow and the Clyde Valley Finalised Joint Structure Plan 2000 which was approved by the Scottish Ministers on the 1st May 2002, currently supports and safeguards the following Nationally Safeguarded Inward Investment Locations:-

Single User High Amenity Sites - Confirmed Status

	GCV SP 2000	Draft NPPG 2
Langlands West	Yes	Yes
Pollok/Ryat (restricted Class IV)	Yes	Yes (*)
Robroyston North	Yes	No
Robroyston South	Yes	Yes
Raith Interchange	Yes	Yes
Woodhall/Faskine (restricted Class IV)	Yes	Yes (*)

Footnote: (*) refers to the fact that although the site is identified the restriction is not - see below

Single User High Amenity Sites - Potential

	GCV SP 2000	Draft NPPG 2
Greenock/Port Glasgow	Yes	No
Bowling Terminal	Yes	No
Darnley Mains	Yes	No
Cambuslang	Yes	No
NE Phoenix/E Candren	Yes	No

Single User High Amenity Sites - Substantially or wholly developed

	GCV SP 2000	Draft NPPG 2
Erskine	Yes	No (*)
Faulds Park	Yes	No (*)
Newhouse West	Yes	No (*)

Footnote: () refers to the fact that although developed sites are afforded some protection they are not named*

Medium Industrial Sites

	GCV SP 2000	Draft NPPG 2
Gartcosh	Yes	No
Ravenscraig	Yes	No

Review Process

- 5 The sites noted above were discussed at individual meetings involving the relevant Local Authority, LEC and the Glasgow and the Clyde Valley Structure Plan Team. At this stage, information was gathered about studies that had been undertaken or were planned and any known site constraints. The outcome of these meetings was reported initially to the Steering Group and then the Scottish Enterprise Liaison Group where the way forward in respect of these sites was discussed.

Outcome of Review

6 Confirmed Sites

- The discussions verified that the list of confirmed sites in the Structure Plan was considered suitable for retention.
- There is the potential for the phased development of Robroyston North in such a way as to retain a significant site. This would not be appropriate for the other locations which retain their Green Belt designation unless developed as a LSUHAS.
- It is appropriate to retain the Class 4 restriction on Woodhall/Faskine and Pollok/Ryatt.

7 Potential Sites

Following discussions regarding the potential LSUHAS sites:-

- the Greenock/Port Glasgow (Riverside) should be removed. This does not affect the designation of the Greenock/Port Glasgow (Riverside) Strategic Industrial and Business Location.
- The location at Clydesmill is no longer available, however, the wider Cambuslang area may be still be appropriate in particular in the context of the Flagship Initiative.
- At Darnley, it is the intention to continue to hold a 5ha LSUHAS within the Darnley Mains SIBL. The proposed change to the Finalised Draft Glasgow City Plan to extend the Darnley Mains SIBL is based in part on the need to retain and promote this site.
- The site at Esso Bowling is still under investigation and should remain as a potential LSUHAS.
- At NE Phoenix/ E Candren, concern has been expressed regarding the possible sterilisation of areas with development potential. It was therefore agreed that this site be removed from the list of potential locations. However, taking account of potential development time scales, it is likely that a substantial area will remain available for development in the medium to long term.
- An additional potential location is recommended for investigation at Royal Ordnance Bishopton.

Although currently LiS consider there will be less demand for major inward investment sites, it should be recognised that the remaining potential LSUHAS represent significant urban renewal opportunities which cannot be easily replaced. There are, however, issues regarding holding such sites and funding to bring them forward if they are not recognised as a national requirement. Given the scale of these areas however it is considered that a substantial area could be held within them for significant users with planned incremental development of the rest of the site.

8 Medium Industrial Sites

- The discussions verified that both Ravenscraig and Gartcosh were considered suitable for retention as Medium Industrial Sites.
- It was also agreed that these sites were significant in terms of Scottish Enterprises priorities rather than local sites. Therefore it would be appropriate to retain reference to these locations in the new NPPG 2 Economic Development.

9 Implications for Revised Draft NPPG 2

It was agreed that the following would be raised with the Scottish Executive as regards the National Significant Sites in the Consultative Draft NPPG2 Economic Development:

- It is the opinion of the Joint Committee and Scottish Enterprise that the Medium Industrial Sites represent significant National investment opportunities and should be safeguarded as such. This position should be reflected in the new NPPG 2 Economic Development.
- It was agreed at the Scottish Enterprise Liaison Group that Robroyston North should remain as part of the LSUHAS portfolio. Given its location within a SIBL there is the potential to incrementally develop the site whilst retaining a significant opportunity.
- It was agreed that the Class 4 restriction should be retained for the Woodhall/Faskine and Pollok/Ryatt locations.
- Discussions with SEN revealed that whilst there has been no comprehensive study of the spatial requirements of Clusters some specific work has been undertaken, for example the Forestry Industries Cluster Site Search. In addition, some areas have attracted 'Growth Cluster' activity e.g. Pacific Quay, Media based and West of Scotland Science Park, technology based. However, it was considered that not all Clusters have particular requirements as regards location. The revised NPPG 2 frees up use of the LSUHAS to permit other use such as 'Clusters'. However, to date, the existing portfolio of LSUHAS has not been investigated specifically for 'Cluster' use. Particular sectors e.g. Financial Services may require large footprint sites but others have specific needs which would not necessarily be catered for by the LSUHAS. Therefore the LSUHAS may not be an appropriate response to future 'Cluster' requirements. The new NPPG 2 should contain more explicit advice in relation to this issue.
- The revised NPPG proposes a search in the Conurbation for Science Parks. No supply/demand context has been given and further advice is therefore sought from the Scottish Executive regarding this issue.

