Clydeplan

Glasgow and the Clyde Valley
Strategic Development Planning Authority


Commonwealth Games Village

Land Supply for Housing Monitoring Report 2015

East Dunbartonshire Council · Inverclyde council · West Dunbartonshire Council · East Renfrewshire Council · Glasgow City Council · South Lanarkshire Council · North Lanarkshire Council · Renfrewshire Council

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May 2017

Headline Figures

Figure 1		GCV Area Totals		
		2014	2015	
Established Land Supply	All Tenure	113,238	**113,276**	↑
	Private	95,763	95,404	↓
	Affordable	17,475	17,872	↑
Effective Land Supply (Total Capacity)*	All Tenure	75,097	**75,993**	↑
	Private	63125	62,100	↓
	Affordable	11972	13,893	↑
Effective Land Supply (programmed in 7 years)	All Tenure	48,278	**48,076**	↓
	Private	36,716	35,924	↓
	Affordable	11,562	12,152	↑
Completions	All Tenure	4,616	**4,991**	↑
	Private	3,054	3,336	↑
	Affordable	1,562	1,655	↑

- The total capacity of sites regarded as effective within the period 2015/22.

1 Introduction

1.1 The Glasgow and Clyde Valley Strategic Development Plan (May 2012) sets out a Vision based on a 'compact city model'. It seeks to focus development on the regeneration of the city region's urban areas and meet the housing need and demand of its communities.

1.2 This monitoring report relates to the land supply and housing completions in the Development Plan area for the period 1st April 2014 to 31st March 2015.

Monitoring process

1.3 To ensure consistency and compatibility of data across the city region the monitoring process is undertaken in accordance with agreed definitions and processes documented in the Housing Land Audit Guidance notes published in April 2014. The guidance reflects PAN2/2010 on Housing Land Audits. This process has been undertaken against consistent standards over a long period of time and today's land supply remains at historically high levels, whilst delivery remains low.

1.4 Each of the eight constituent Glasgow and the Clyde Valley local authorities undertook a detailed housing land audit and, in collaboration with Homes for Scotland, sites were assessed to establish their effectiveness and agree their programming for the next seven years. A seven year time horizon is utilised to enable time for SDP approval ahead of the publication of LDPs.

1.5 Programmed units are known as the 'effective supply' and when added to the non-programmed units are collectively known as the 'established supply'.

1.6 The collaboration with Homes for Scotland is undertaken under the framework and timeframes agreed in the Clydeplan/Homes for Scotland Concordat of October 2014. Unfortunately however, due to a number of mitigating factors, completion of the audits within the timeframes agreed, was not achieved and improvements in performance, will continue to be sought to assist the efficient and timely conclusion of the audits.

1.7 Sites where there was a disagreement over programming between the local authority and Homes for Scotland were recorded as 'disputed' and the number of disputed units noted. The vast majority (94%) were, however, agreed.

Changes in Monitoring

1.8 As with any long term monitoring process, priorities and focus change over time. Recent changes to the monitoring of housing land have involved the inclusion of alternative tenures from the traditional private and social rent sectors. Although an attempt has been made to retain consistency, the changes to tenure definitions may limit the ability to draw a direct comparison with previous monitoring reports or the Housing Need and Demand Assessment (HNDA) reports. Specifically, the Glasgow and the Clyde Valley Housing Need and Demand Assessment (May 2015) uses definitions of 'Private Sector' and 'Social Rent and Below Market Rent Sector' that are not used in this report.

Format of Report

1.9 The report is presented in two sections, the first focuses on **details in a written analysis of the data,** covering key aspects of the Spatial Development Strategy including regeneration areas in the 'Development Corridor', Community Growth areas and Housing Market Areas.

1.10 The second part of the document (in the annex) covers the traditional **summarised data in tabular format** as well as some new tables showing programming and additional local authority details generated by the capacity changes check.

2 Spatial Development Strategy

Development Corridor sites delivering

2.1 A key mechanism in the SDP for delivering ***brownfield regeneration*** is the promotion of the Development Corridor at Clyde Waterfront, Clyde Gateway, and Ravenscraig. These initiatives are a cornerstone of the effective supply and have continued to deliver units in 2015 and at higher levels than in 2014.

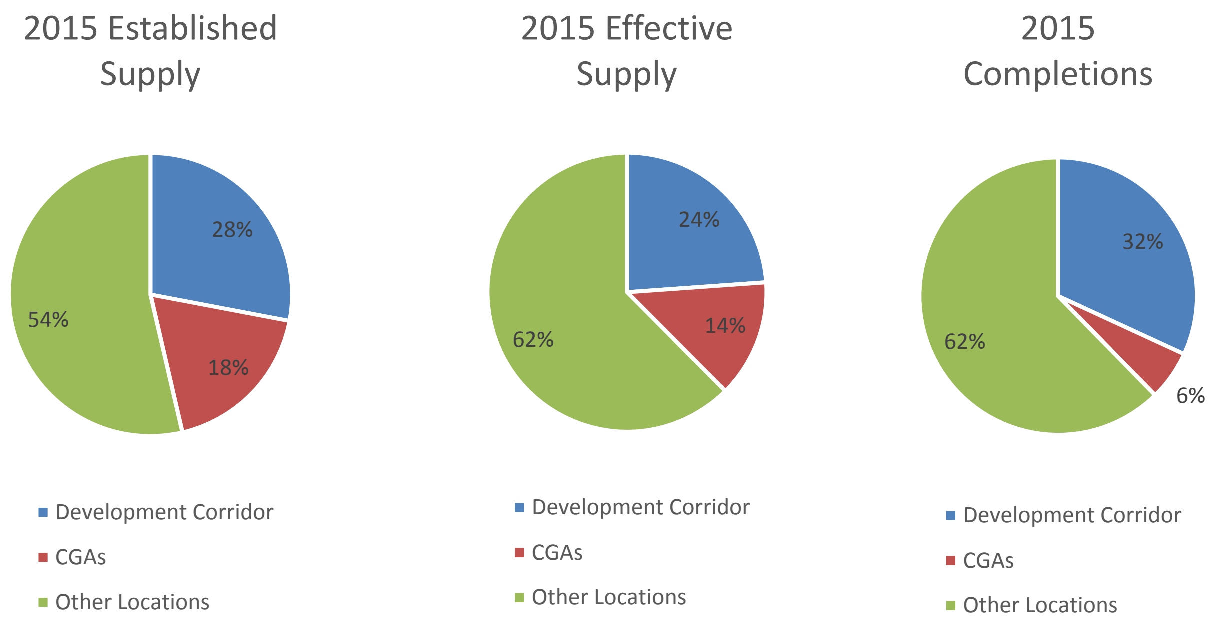
2.2 58 sites accounting for 32% (1,591 units) of the total all tenure completions (4,991 units) were located within the Development Corridor areas. The vast majority of units were completed on brownfield sites with only 30 units on greenfield.

2.3 Delivery of 1,591 units was significantly above completions in 2014 (990) which aligns with what was programmed in 2014. Locations that contributed include the Commonwealth Games Village, Laurieston, and Oatlands in Glasgow; Lomondgate in Dumbarton; Ravenscraig in Motherwell; and Ferry Village in Renfrew. 53% of completions were in the private sector with 47% from the social sector, which plays a greater role in delivery in the development corridor than in general around the region.

2.4 The remaining 2015 capacity of the flagship areas was 31,710 units of which 36% (11,475 units) were considered effective. The total remaining capacity of sites regarded as effective is 17,434 units which will enable delivery to accelerate should general market conditions improve.

2.5 The charts below put the Development Corridor’s contribution into context. In relation to the all tenure supplies it accounted for 28% of the established supply, 23% of the effective supply and 21% of all completions. Comparing the 2015 to 2014 position, the contribution to the effective supply is up, as are completions which have increased from 21% to 32%.

Figure 2.1



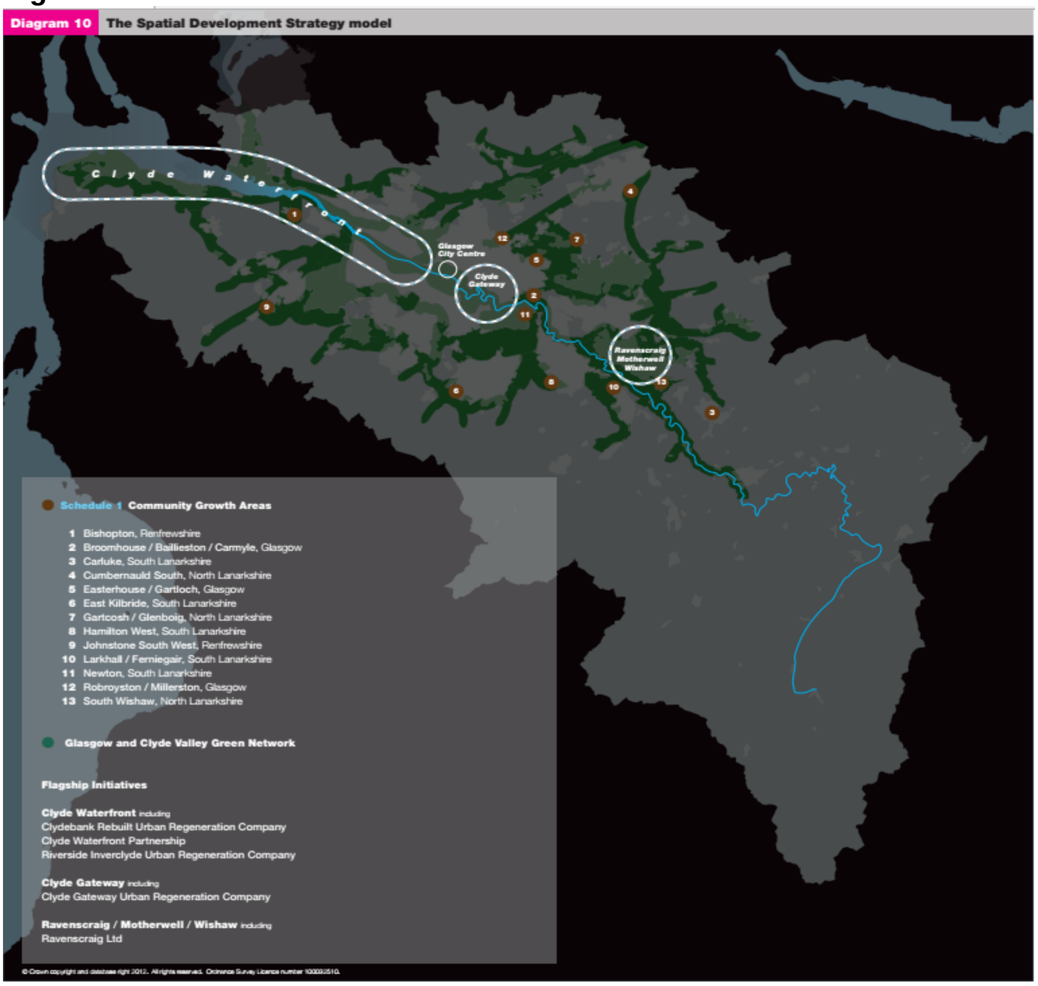
2.6 Programming suggests that the Development Corridor is anticipated to deliver similarly strong completion rates in 2015/16 and an average of over 1600 per year over the next seven years. Significant regeneration projects are ongoing and planned including Ravenscraig, the Commonwealth Games Village, 6 Transformational Regeneration Areas in Glasgow at Sighthill, Gallowgate, Laurieston, Maryhill, North Toryglen and Pollokshaws, as well as numerous city deal projects such as City Centre Public Realm, Clyde Waterfront Regeneration, and the Collegelands Calton Barras Action Plan. Given this activity, it is envisaged that delivery at these levels can be achieved and perhaps exceeded, as market confidence gradually returns within both investors and home owners alike.

Figure 2.2, Programming within the Development Corridor

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Programmed units	1601	1310	1536	1878	1891	1751	1508

2.7 In summary, the Development Corridor would appear to be continuing to underpin the regeneration agenda provided by the Strategic Development Plan. These areas are delivering and look set to continue to play an important role in delivering the brownfield regeneration agenda.

Figure 2.3



Spatial Development Strategy model for Glasgow and the Clyde Valley Strategic Development Plan (May 2012)

Community Growth Areas beginning to deliver completions

2.8 Community Growth Areas (CGA) are one of the SDP's key mechanisms to support medium to longer term growth. They are generally located in greenfield locations close to established public transport links and aim to achieve multiple social, economic and environmental benefits.

2.9 Originally conceived to deliver 19,000 units by 2018, these sites have taken longer than anticipated to develop. The first completions were recorded in 2014 and programming suggests that by 2018 over 2,000 units will have been completed.

2.10 The 13 CGAs are currently comprised of 29 individual land parcels which in turn are subdivided into individual development phases. In total the CGAs are currently represented by over 80 sites within the Housing Land Audit and account for 20,672 units. The overall capacity figure tends to vary from year to year as capacity changes are made to reflect planning permissions and more detailed projects and masterplans. The estimated capacity of the known CGA sites has dropped slightly this year due to some minor capacity changes in a number of the CGAs.

2.11 The following table summarises the position for each of the CGAs as at 2015:

Figure 2.4	**Community Growth Areas**				
	Capacity	**Units built**	**2015/16**	**2015/22**	**Post 2022**
Baillieston/Broomhouse/Carmyle	1,500	70	167	1,240	190
Bishopton**	2,615	295	111	772	1,548
Easterhouse	0*	0*	0*	0*	0*
Carluke	617	0	7	7	610
Cumbernauld South	1,200	0	0	357	843
East Kilbride	3,235	0	0	905	2,330
Ferniegair/ Larkhall (E&W)	1,887	9	52	445	1,433
Gartcosh/ Glenboig	3,040	0	0	851	2,189
Hamilton West	2,221	0	0	726	1,495
Johnston South-West	403	37	20	158	208
Newton	1,600	0	120	910	690
Robroyston/Millerston	1,600	0	0	200	1,400
Wishaw	900	0	0	0	900
CGA Total	**20,818**	**411**	**477**	**6,571**	**13,836**
2015 Clydeplan Total Land Supply	**113,276**	**N/A**	**5,764**	**48,076**	**65,200**

**No sites have been identified within the Easterhouse CGA but 1,300 were indicated as part of the 2006 release*
***Capacity includes phases wholly built out (recorded in HLAB)*

2.12 Long lead-in times are to be expected for this scale of development and now in 2015, 4 of the CGAs have begun to deliver completions. In 2016, starts on site are programmed in 6 of the CGAs and 11 of the 13 CGAs are programmed to start in the next 7 years, with only Easterhouse and Wishaw having **no** completions programmed by the end of March 2022.

2.13 Detailed programming is provided in the table below. As a result of more positive take up than anticipated in Bishopton, completions were stronger in 2015. Programming for 2016 is also more positive than in 2014. From 2017 onwards programming is at lower rates than was programmed in 2014 and programming for the total seven year period is slightly lower overall.

Figure 2.5

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	CGA Effective Supply
2014 Programming	197	373	728	1,143	1,319	1,414	1,503	--	6,677
2015 Programming	-	477	565	765	1081	1293	1266	1124	6571
2015 Completions	289								
Change from 2014 programming	92	104	-163	-378	-238	-121	-237	--	-106

2.14 The wider economic slowdown and change in housebuilding market conditions has undoubtedly had an effect on developing large scale sites such as the CGAs. Although they have been slow to commence on-site they are now beginning to produce completions and remain a significant element of the medium to long term growth strategy for the city region, with strong support from both planning authorities and development sector, with completions programmed throughout the effective period (and capacity to deliver beyond 2021). A number of the CGAs are the subject of City Deal Programme funding to support infrastructure and delivery.

2.15 To put their contribution into context, they accounted for 18% of the all tenure established supply, 14% of the effective supply and 3% of the completions in 2014 – see pie charts at 2.1.

Note

- For more information and a detailed breakdown of Community Growth Areas, using data from 2013, see the Annex to the monitoring report that accompanied the Main Issues Report (MIR) 2015 (pages 72 – 140).
- The data for the Development Corridor and CGAs was drawn from GIS analysis of grid references and may have omitted some sites where the centroid did not fall with the study area.

3 The Land Supply

All Tenure Housing

3.1 As indicated in the headline statistics, the all tenure supply remains in 2015 at a historically high scale. The land supply programmed within a seven year period (the effective supply) could deliver 6,700 homes per annum. This scale of programming, largely agreed with Homes for Scotland, apart from a small scale of disputes, looks overly optimistic given current levels of delivery, which although showing signs of improvement, have averaged at around 4,800 units for the last two years.

Figure 3.1

GCV Area All Tenure Totals		2014	2015
Established Land Supply	**All**	**113,238**	**113,276**
	Brownfield	71,919	70,628
	Greenfield	41,319	42,648
Effective Land Supply (Total Capacity)*	**All**	**75,097**	**75,993**
	Brownfield	44,522	44,013
	Greenfield	30,575	31,980
Effective Land Supply (programmed in 7 years)	**All**	**48,278**	**48,076**
	Brownfield	30,778	29,473
	Greenfield	17,500	18,603
Completions	**All**	**4,616**	**4,991**
	Brownfield	3,497	3,922
	Greenfield	1,119	1,069

- The total capacity of sites regarded as effective within the period 2015/22.

Private Tenure Housing

3.2 The Glasgow and the Clyde Valley Strategic Development Plan (May 2012) used the *Housing Market Area (HMA) framework* for its assessment of housing need and demand in the private sector, in order to reflect the manner in which house buyers search and move irrespective of Local Authority boundaries. This section details the 2015 position.

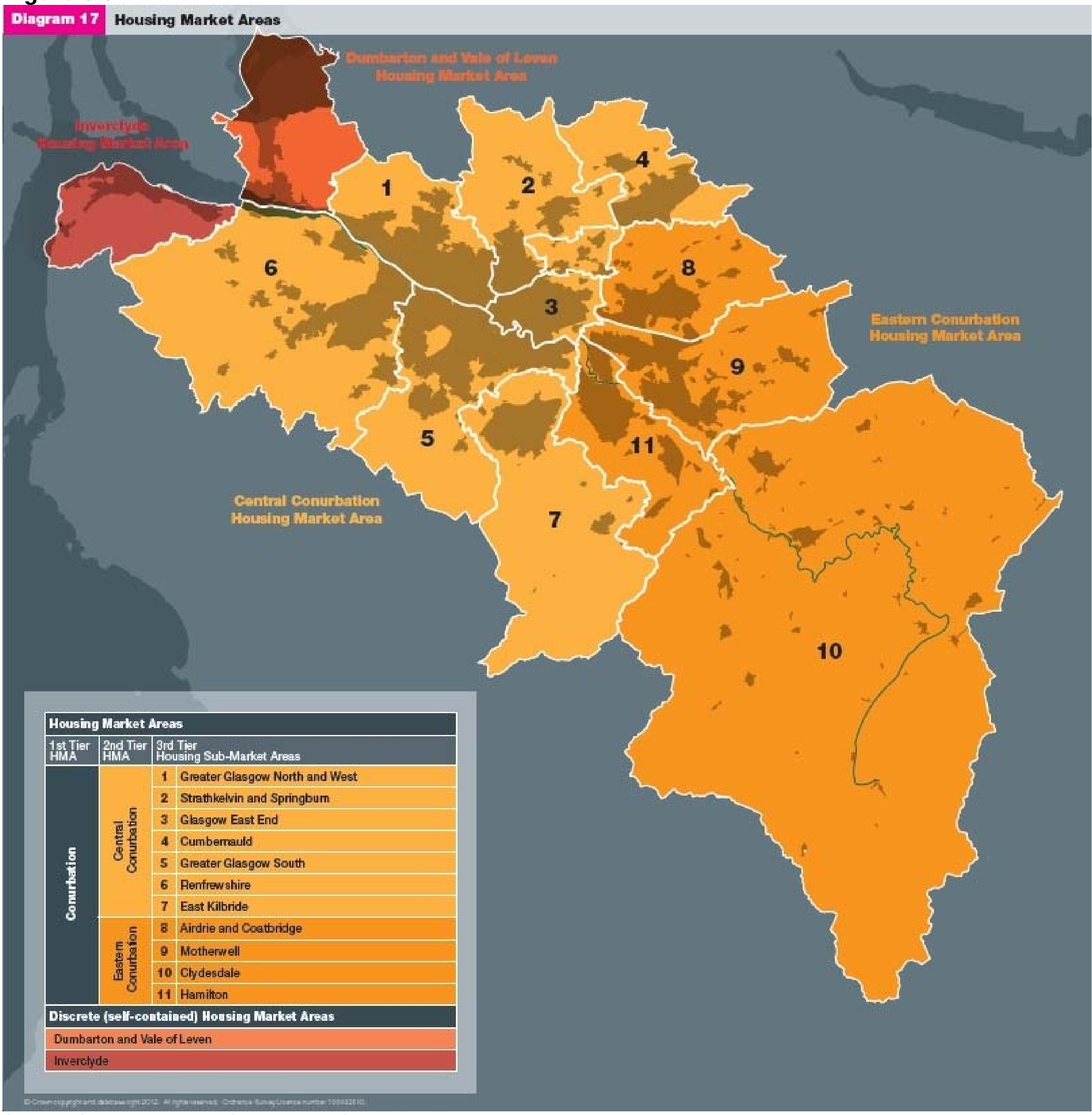
3.3 The HMA framework consists of the **Conurbation** (sub-divided into the Central Conurbation and the Eastern Conurbation). There are two discrete housing market areas **Dumbarton and the Vale of Leven** in West Dunbartonshire and part of **Inverclyde** not including Kilmacolm and Quarriers Village (the darkest orange and red areas shown on the map above). Note that units within the Loch Lomond and the Trossachs National Park are now excluded from the figures (the brown area at the top left of the map).

3.4 For the purpose of this analysis, the private sector supply is only Owner Occupied plus private rented housing, and does not include any intermediate tenure products. The following tables summarise the private sector land supplies for the GCV area and within the HMA framework:

Figure 3.2

GCV Area Private Tenure Totals		2014	2015
Established Land Supply	**All**	95,763	95,404
	Brownfield	58,408	57,012
	Greenfield	37,355	38,392
Effective Land Supply (programmed in 7 years)	**All**	36,716	35,924
	Brownfield	21,348	19,694
	Greenfield	15,368	16,230
Completions	**All**	3,054	3336
	Brownfield	2,178	2383
	Greenfield	876	953

Figure 3.3



Source: Glasgow and the Clyde Valley Strategic Development Plan (May 2012)

Figure 3.4 Private Supply and Delivery

Conurbation		2014	2015
Established Land Supply	**All**	**89,997**	**89,848**
	Brownfield	53,907	52,621
	Greenfield	36,090	37,227
Effective Land Supply	**All**	**34,608**	**33,952**
	Brownfield	19,861	18,304
	Greenfield	14,747	15,648
Completions	**All**	**2,837**	**3,087**
	Brownfield	2,001	2,174
	Greenfield	836	913

Central Conurbation		2014	2015
Established Land Supply	**All**	**65,397**	**66,111**
	Brownfield	41,136	40,617
	Greenfield	24,261	25,494
Effective Land Supply	**All**	**26,570**	**26,657**
	Brownfield	15,032	14,245
	Greenfield	11,538	12,412
Completions	**All**	**2,107**	**2,136**
	Brownfield	1,389	1,349
	Greenfield	718	787

Eastern Conurbation		2014	2015
Established Land Supply	**All**	**24,600**	**23,737**
	Brownfield	12,771	12,004
	Greenfield	11,829	11,733
Effective Land Supply	**All**	**8,038**	**7,295**
	Brownfield	4,829	4,059
	Greenfield	3,209	3,236
Completions	**All**	**730**	**951**
	Brownfield	612	825
	Greenfield	118	126

Dumbarton and the Vale of Leven		2014	2015
Established Land Supply	**All**	**2,498**	**2,443**
	Brownfield	2,183	2,131
	Greenfield	315	312
Effective Land Supply	**All**	**1,147**	**1,008**
	Brownfield	907	775
	Greenfield	240	233
Completions	**All**	**142**	**138**
	Brownfield	142	138
	Greenfield	0	0

Inverclyde		2014	2015
Established Land Supply	**All**	**3,268**	**3,113**
	Brownfield	2,318	2,260
	Greenfield	950	853
Effective Land Supply	**All**	**961**	**964**
	Brownfield	580	615
	Greenfield	381	349
Completions	**All**	**75**	**111**
	Brownfield	35	71
	Greenfield	40	40

Note: Figures for individual local authorities are included within the tables in the Annex.

3.5 The private sector land supply in 2015 remains at a high level. Completions of over 3,000 private sector units have occurred, whilst additions to the supply plus capacity changes, have meant that the overall private sector conurbation supply remains high at **89,848.**

3.6 Both greenfield and brownfield completions have increased in the last year. Further analysis of greenfield/ brownfield splits is provided later and the Annex provides more detailed data.

Social Tenure Housing

3.7 Long term records for social housing completions have not routinely been collated using the Clydeplan Housing Land Audit data (Annex Part B – tables 6 to 8 provide details for 2014-15).

3.8 The change in social housing tenure supply from 2012 to 2015 shows an increase in established supply (up 31% by 3,800 units). Notable is that 70% of the social sector land supply is programmed in the effective period as compared with 38% of the private sector supply indicating a higher degree of confidence of delivering completions within 7 years, probably due in significant part, to the certainty of funding and delivery associated with this tenure.

Figure 3.5a

Social Housing	2012	2013	2014	2015
Established Supply	12,130	14,196	15,221	15,930
Effective Supply	7,962	9,903	10,367	11.233
Completions	2,496	1,392	1,442	1,565

Figure 3.5b

Intermediate	2012	2013	2014	2015
Established Supply	1,666	2,259	2,254	1,942
Effective Supply	1,159	1,241	1,195	919
Completions	243	147	120	90

Figure 3.5c

Affordable (Social + Int)	2012	2013	2014	2015
Established Supply	13,796	16,455	17,475	17,872
Effective Supply	9,121	11,144	11,562	12,152
Completions	2,496	1,539	1,562	1,655

3.9 Although the subject of much policy focus, the intermediate tenure is not showing significant increases in supply or delivery, which might have been expected.

3.10 The affordable sector overall, is up in supply and delivery (due to the stronger influence of the social housing tenure supply on this sector). (See Figure 3.5(c) above). Importantly, in relation to delivery, the affordable sector now represents a more significant proportion of delivery (nearly 40% since 2009/10) as private sector completions continue at levels significantly lower than the long term average. However it tends not to be well represented within longer term programmed supply for a number of reasons articulated in Section 7, General Outlook.

3.11 Focusing specifically on social housing tenure completions, the table below is an extract for the Clydeplan local authorities using longer term data from Scottish Government (more information on how these figures are derived can be found on the Scottish Government website).

Figure 3.6

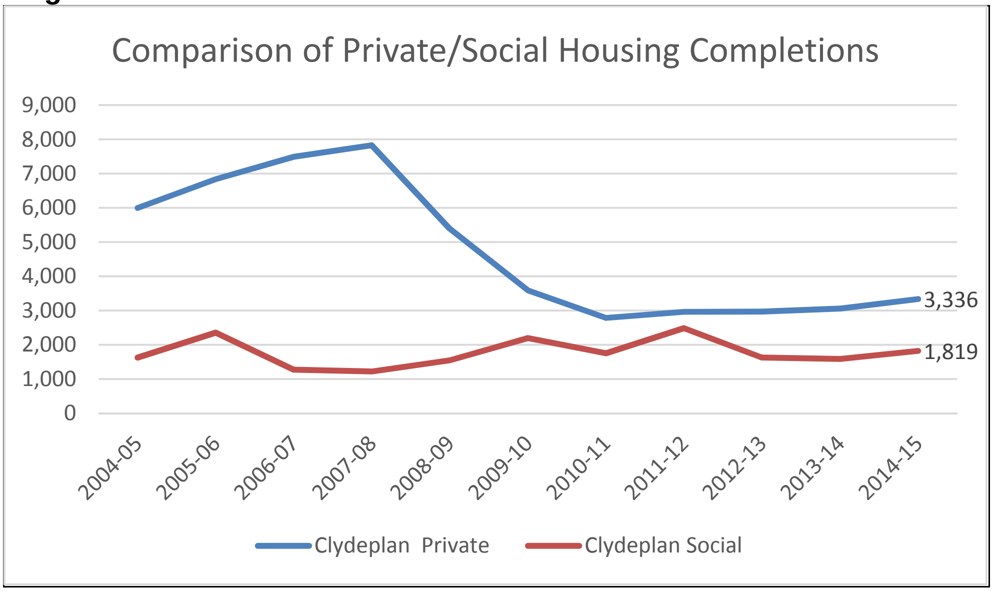


Figure 3.7, Social Sector Housing Completions

	2004 -05	2005 -06	2006 -07	2007 -08	2008 -09	2009 -10	2010 -11	2011 -12	2012 -13	2013 -14	2014 -15
East Dunbartonshire	7	142	0	26	42	26	133	30	157	138	141
East Renfrewshire	19	46	37	0	20	119	57	15	119	16	0
Glasgow City	802	951	821	773	756	922	1,090	1,202	590	725	1293
Inverclyde	103	117	8	58	85	336	25	376	159	126	6
North Lanarkshire	123	442	82	65	232	244	251	165	166	193	192
Renfrewshire	165	278	98	115	80	109	90	236	175	196	40
South Lanarkshire	285	136	154	134	278	359	56	243	247	141	45
West Dunbartonshire	121	241	71	48	51	78	48	217	13	48	102
Clydeplan	1,625	2,353	1,271	1,219	1,544	2,193	1,750	2,484	1,626	1,583	1,819
Clydeplan % of Scotland	40%	50%	39%	30%	31%	37%	31%	42%	39%	39%	43%
SCOTLAND	4,024	4,698	3,237	4,125	4,913	5,989	5,725	5,890	4,207	4,051	4,221
Clydeplan Private (annex: Table 16)	5,996	6,838	7,493	7,827	5,389	3,587	2,782	2,961	2,967	3,054	3,336
Clydeplan Social	1,625	2,353	1,271	1,219	1,544	2,193	1,750	2,484	1,626	1,583	1,819
Indicative Total	7,621	9,191	8,764	9,046	6,933	5,780	4,532	5,445	4,593	4,637	5,155
Indicative % Social	**21%**	**26%**	**15%**	**13%**	**22%**	**38%**	**39%**	**46%**	**35%**	**34%**	**35%**

Source: NB1 returns by local authorities to the Scottish Government, Communities Analytical Services (Housing Statistics)

3.12 The national figures indicate that the Clydeplan area has been a major source of Scotland's social housing sector delivery in the past 10 years accounting for 38% (1,770 units) of Scotland's new social housing per year. For the 2014-15 period Clydeplan has delivered 1,819 units (43%) with much higher delivery notable in Glasgow City.

3.13 Using the national data above and comparing social sector completions with private sector completions (derived from Annex, table 16), it is clear that the social sector has been becoming a more significant element of delivery within the Clydeplan area, while private sector completions have declined significantly.

Note

- National data has been published using the NB1 returns that Local Authorities are required to submit to the Scottish Government which show units which are complete (but not necessarily occupied). (http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/NewBuildSocSec)
- This data differs from how completions are recorded through the audit process, and therefore comparison of completions in Figure 3.7 above, is indicative.
- The NB1 figures account for more completions than those recently recorded by the HLA. This is likely because of the way completions are recorded by each survey (the NB1 returns do not require the units to be occupied while the HLA requires them to be complete and occupied). Over a longer period the total completions would be expected to align.

4 Land Supply – Issues and Trends

New Sites, Deallocations and Capacity Changes

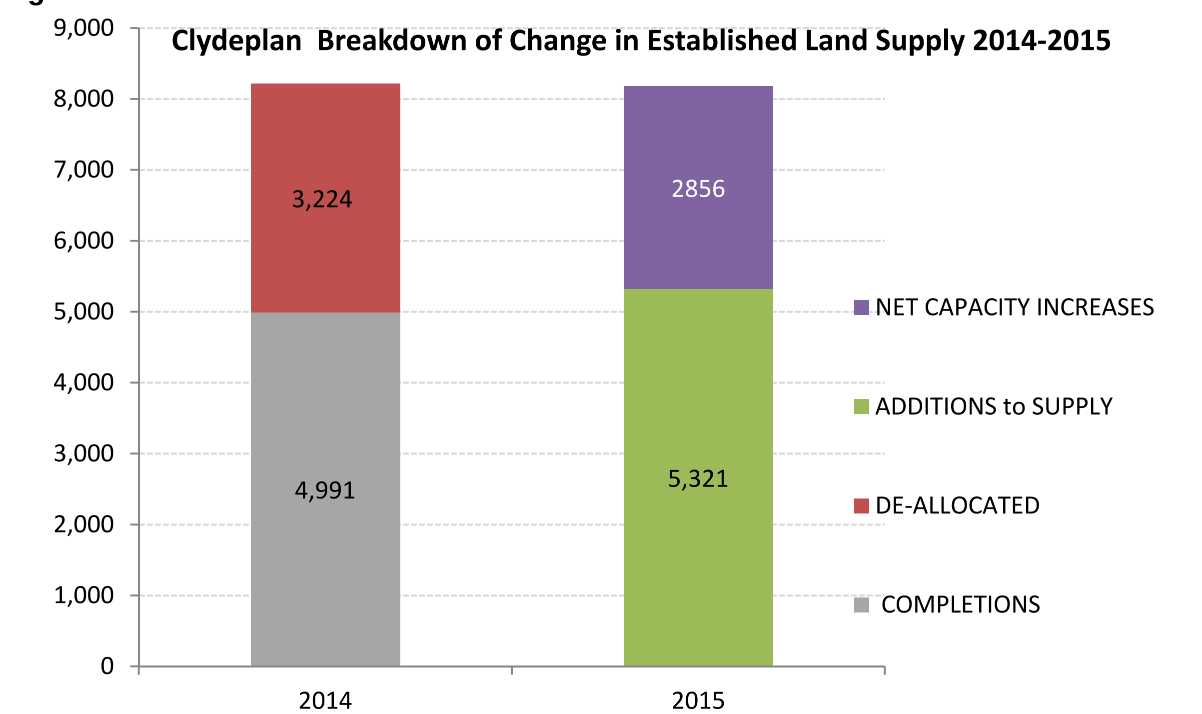
4.1 This year the established land supply total for the Clydeplan remained broadly the same decreasing by only 38 units from 113,238 units in 2014 to 113,276 in 2015. There were 147 new sites comprising 5,321 units added to the supply; 247 sites delivering 4,991 completions; and 70 sites totalling 3,224 units removed from the audit.

Figure 4.1: New Sites in 2015		
AUTHORITY	**NUMBER**	**CAPACITY**
East Dunbartonshire	39	1032
East Renfrewshire	4	120
Glasgow City	19	1333
Inverclyde	8	212
North Lanarkshire	12	368
Renfrewshire	5	1053
South Lanarkshire	53	1033
West Dunbartonshire	7	170
Clydeplan	**147**	**5321**

Figure 4.2, Site Deallocations		
AUTHORITY	**NUMBER**	**CAPACITY**
East Dunbartonshire	6	188
East Renfrewshire	1	40
Glasgow City	22	779
Inverclyde	6	266
North Lanarkshire	10	1312
Renfrewshire	4	117
South Lanarkshire	15	254
West Dunbartonshire	6	268
Clydeplan	**70**	**3224**

4.2 The remaining changes were as a result of capacity and phasing changes as sites progress through the development pipeline and planning processes. Sites become sub divided into new phases, and the tenure and site capacities change. The chart below shows the changes to the Clydeplan established supply broken down into component parts.

Figure 4.3



4.3 The component parts of the 2014 supply are shown on the left bar chart and the changes shown in colour. They consist of *de-allocated*, which are sites that are no longer recorded in the audit and *completions*, which are units where a house was built and occupied.

4.4 The bar chart on the right shows the component parts of the 2015 supply and accounts for essentially a stand still position with respect to the scale of the established land supply which reduced by only 38 units from 2014 to 2015.The changes are accounted for by *additions*, which are new sites (sites on new land – not sub-divided or sub-tenured sites) which did not previously appear in the 2014 audit, and *Net Capacity Increases which incorporates net increases less net decreases* plus more complex changes which includes sites being split into new phases and phasing capacity changes.

4.5 The importance of these elements for the city region are summarised in the table below.

Figure 4.4

Clydeplan	Units	% of 2014	Rank
Established Land Supply 2014	113,238		
Additions (new sites)	5,321	4.7%	1
Completions (2014/15)	4,991	4.4%	2
Net Capacity Increases	2856	2.5%	4
De-Allocated	3,224	2.8%	3
Established Land Supply 2015	113,276		

4.6 In terms of headlines for the Clydeplan city region:

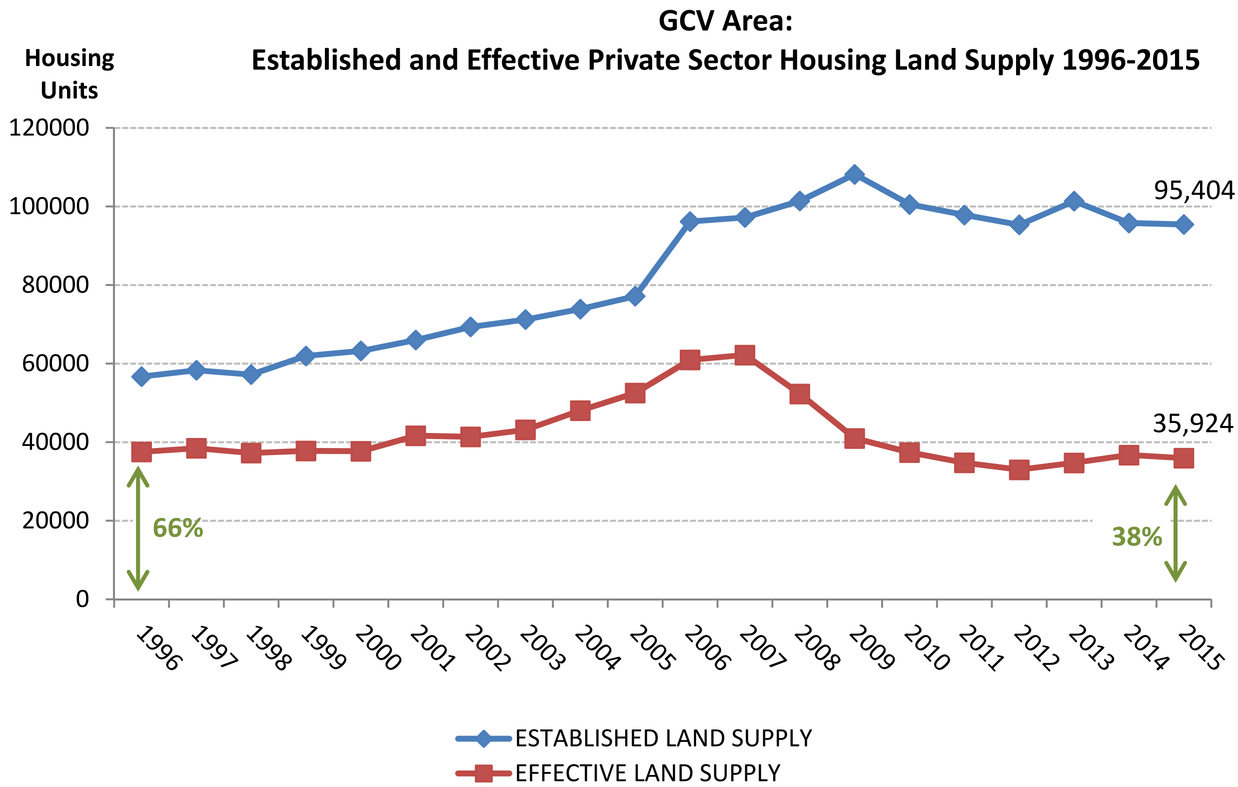
- Additions are the most impactful element of change (4.7%)
- Additions (units from new sites) are higher than Completions;
- There were more units added (Additions and Capacity Increases) than completed (Completions).
- Deallocated sites represent 40% of units removed from the survey.

4.7 Note that the totals and the trends are heavily influenced by the dominance of Glasgow and that each Local Authority has its own distinct profile. In the larger authorities, small proportionate changes make large numeric difference with the reverse being true in small authorities and it is important not to understate the importance of Glasgow in any proportional changes.

Private Tenure Housing – Long Term Land and Delivery Trends

4.8 Figure 4.5 below summarises the **private tenure** housing land supply over the period 1996-2015 for the whole GCV area. This geography is larger than the conurbation geography.

Figure 4.5



4.9 The private established supply has experienced a significant rise over the period with a recent plateau at around 95,000 units. It increased 68% during the 19 year period between 1996 and 2015 as a result of units being added to the supply quicker than they were developed. The average annual increase accounted for over 2,000 more units per year although in recent years (from 2006 onwards) the supply has remained at around 95,000 units. This level of supply is the highest it has been since recording began.

4.10 The element of the private established supply considered 'effective' has peaked and troughed over the period. This year the total number of effective units (35,927) is similar to that recorded for 1996 (37,528) but the proportion of the supply which is considered effective is much lower (38% compared with 66% in 1996).

4.11 The consequence of this is that the non-effective element of the supply (the element expected to deliver units beyond the 7 year period) has increased substantially (by around 300%) from around 19,000 to 59,000 and now accounts for the majority of the private established supply (62%).

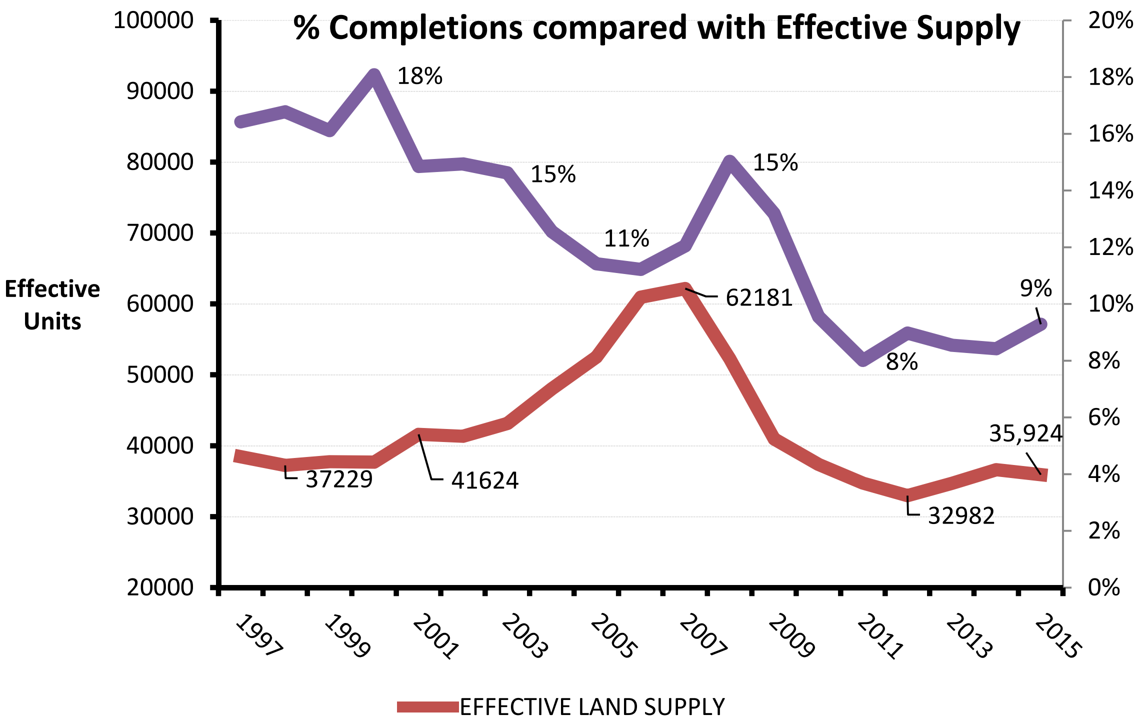
4.12 This land supply has enabled a substantial level of private completions between 1996 and 2015 (102,000 units). While private completions levels have been around 3,000 units since 2009/10 the average for that period is around 5,400 units per year.

4.13 As revealed in the figure below however, there is no clear or strong relationship between available effective land supply and delivery.

4.14 Whilst the scale of the land supply regarded as effective increased significantly in the period leading up to the peak in 2007/08, and over other periods has been rarely below 35,000, the proportion that results in delivery has varied and generally reduced over time. The same amount of land supply in 2015 is delivering proportionately only half what was delivered in the late nineties, 8% now in 2015 and 18% in 1997.

4.15 The conclusion can only be the rather simplistic one, that the relationship between the available supply and delivery is influenced by many other factors other than land availability alone.

Figure 4.6



Total Capacity and Planning Status of Effective Supply

4.16 The effective supply is that part of the established supply programmed for completion within the 7 year period. It is considered to be generally constraint free and Homes for Scotland have agreed that a start can be made on that site within a 7 year period. It is also that part of the supply which will get developed out more quickly if demand and delivery accelerate.

4.17 Of the effective supply, 48,076 units are programmed to be delivered within a 7 year period however, the total capacity of that part of the supply is nearly 76,000 units of which 62,000 units are identified for delivery by the private sector. Over 13,000 units are on sites currently under construction and nearly 20,000 units are programmed for delivery in the next three years. Over 13,000 units are on sites currently under construction and nearly 20,000 units are programmed for delivery in the next three years.

4.18 In addition to the 13,000 units on sites currently under construction, another 32,000 units have the benefit of planning consent. Therefore over 45,000 units have the benefit of planning permission, and of those 13,000 units are under construction.

Figure 4.7, Effective Supply		**2015**
Programmed in 7 years	All Tenure	**48,076**
	Private	35,924
	Affordable	12,152
Total Capacity	All Tenure	**75,993**
	Private	62,100
	Affordable	13,893
Under Construction Total Remaining Capacity of sites under construction	All Tenure	**13,226**
	Private	11,143
	Affordable	2,083
Planning Consent Total Remaining Capacity of sites with Planning Consent*	All Tenure	**31,862**
	Private	29,846
	Affordable	2,016

*In addition to sites under construction

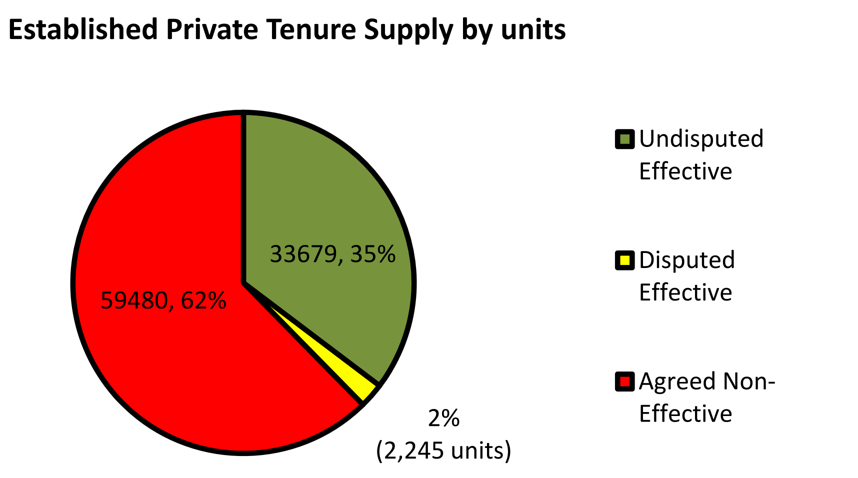
5 Homes for Scotland

5.1 As per the advice in PAN 2/2010: Affordable Housing and Housing Land Audits, when preparing the housing land audit the Clydeplan local authorities consult with Homes for Scotland, the representative body for the housebuilding industry in Scotland. Estimation of the effectiveness and programming of sites involves collaborative working between Local Authorities, Homes for Scotland as well as other non HfS developers. Clydeplan and Homes for Scotland have an agreed Concordat (Oct 2014) covering the approach to Housing Land Audits.

5.2 The Clydeplan authorities base their approach to the audit on written agreed standards which has been useful in ensuring a generally low level of disputes in the approach to the audit and programming of sites.

5.3 In 2015, 94% of the effective supply was agreed, however, there are occasions where the Local Authority consider a site effective and its programming reasonable but Homes for Scotland disagree, either wholly or in part. On these occasions the outstanding units are recorded as disputed.

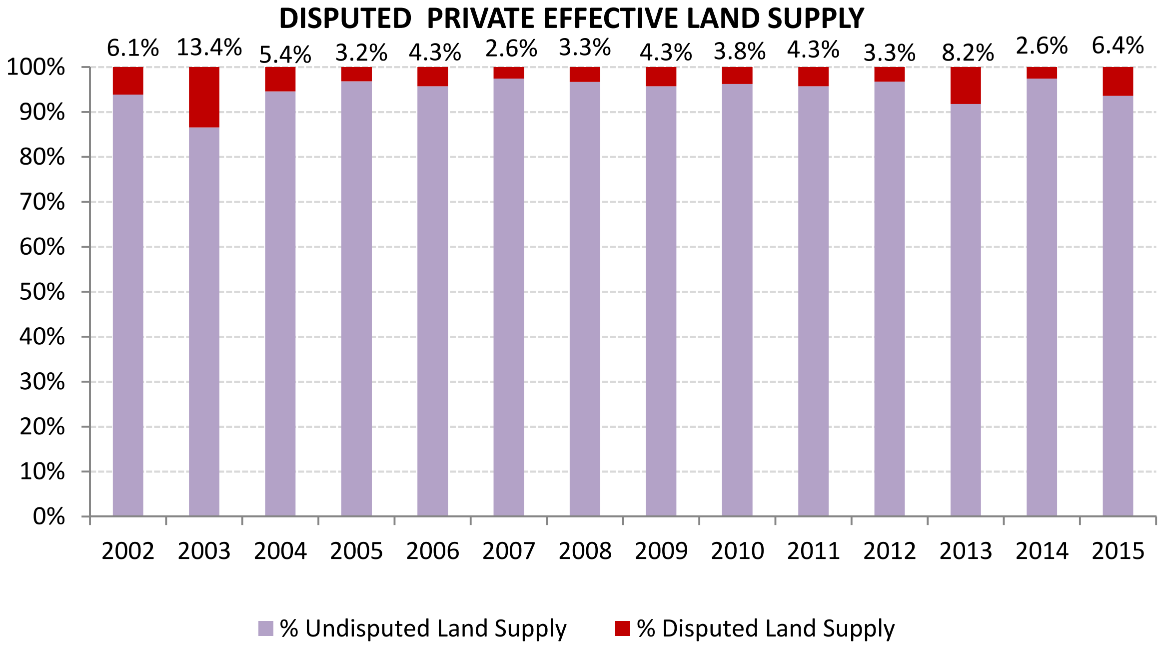
Figure 5.1



5.4 Disputed sites are recorded for private tenure units only. They accounted for 2% of the private tenure established land supply in 2014.

5.5 There were 38 sites, accounting for 2,310 units that were disputed which is markedly up on previous levels of disputes and this will continue to be monitored in future years.

Figure 5.2



5.6 The fluctuation of these figures in the past 4 years could be down to a number of factors including the continuing uncertainty in the market and the difficulty, for both the Local Authorities and the house-builders, in assessing effectiveness and predicting programming over a 7 year period. Variances in dispute levels may also correlate with the plan preparation stage a local authority is at. Ongoing monitoring may reveal any relevant patterns.

6 Delivery

Who is planning to Build

6.1 As noted above Homes for Scotland represent some of the major housebuilders in Scotland. The following is a list of the developers anticipated to be responsible for the largest proportion of completions in the Clydeplan area over the next 7 years (21% of all programmed units, 12,894 from 48,076).

6.2 Of the total units programmed in the next 7 years (48,076), 12,152 units or 25% are programmed for the affordable sector with Glasgow and Sanctuary Housing Associations being major developers in that sector.

Figure 6.1

Rank	Developer	Units Programmed for effective period (2015/16-2021/22)
1	Persimmon Homes	2,018
2	Taylor Wimpey	1,935
3	Glasgow Housing Association	1,789
4	Miller Homes	1,368
5	Cala	1,319
6	Sanctuary Scotland Housing Association	1,146
7	Bellway	927
8	Bett	894
9	Cruden	778
10	Mactaggart & Mickel	720
	TOTAL of TOP 10	**12,894**

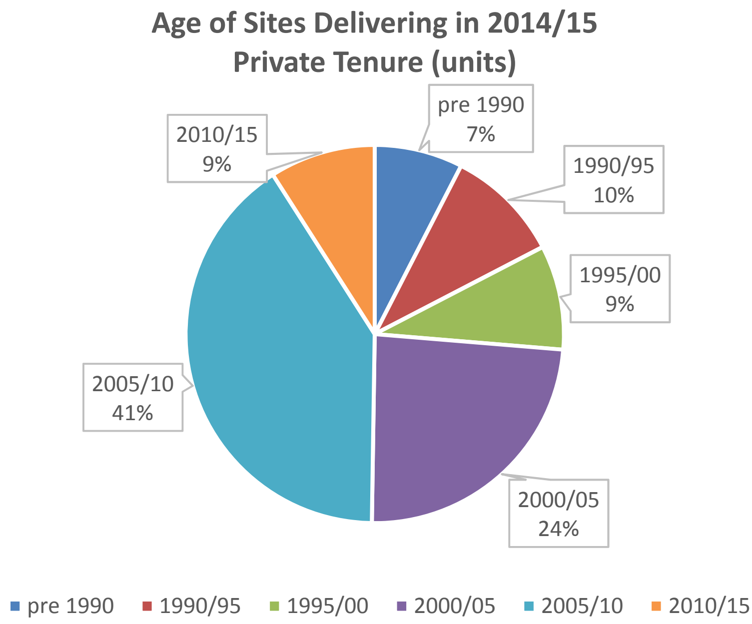
What is the Age of Sites delivering – Private Tenure

6.3 Of the 4,991 units built last year from 247 sites, we know that 3,336 were brownfield and the remaining 1,655 were greenfield. This is a split of 67%/33% which is consistent with the pattern over recent years and indeed the longer term (See Figure 6.5 below).

6.4 Delivery came from 247 sites and for 25 of these, the age was not recorded. These were exclusively social sector housing sites in Glasgow where this information has not previously been recorded, therefore the following analyses focuses on private sector delivery only.

6.5 196 sites accounting for 3,336 units were exclusively built for the private sector with the vast majority for owner occupation. Of those sites that delivered in 2014/15, only 9% were 5 years old or younger. 50% were under 10 years old meaning of course that half of the sites that delivered in 2014/15 have been in the land supply for 10 years or more. 65% of sites that delivered have been in the survey for between 5 and 15 years.

Figure 6.2



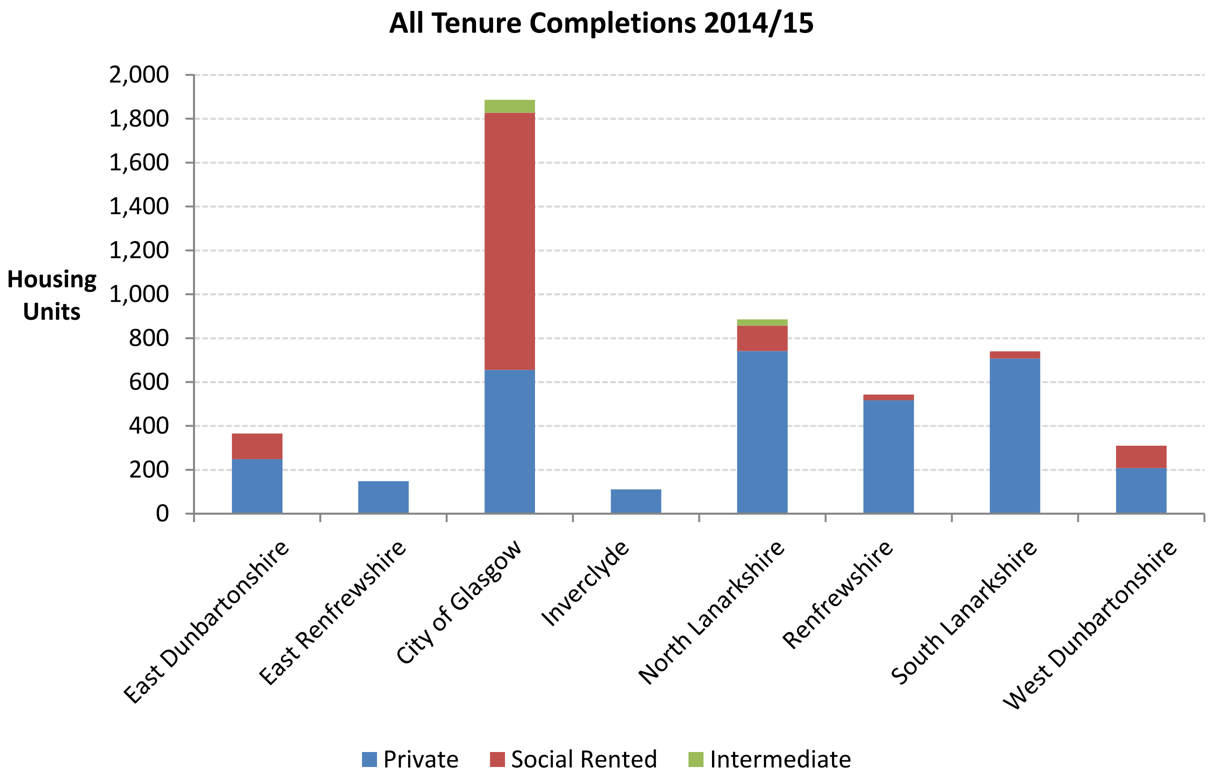
6.6 Analysis of the 2014 audit, supports these findings which call into question a couple of assumptions. Firstly, Scottish planning Policy is predicated on delivery within a 5 year time frame and this analysis reveals that only 9% of private sector delivery arises from sites 5 years or younger. Secondly, over 44% of sites that deliver are over 12 years old which places some question over the Homes for Scotland assumption that any site which has appeared in the housing land audit for 12 more years, without significant recent progress, is non-effective.

6.7 Age of sites delivering will continue to be monitored and future years will look to analyse the social sector as well as the private.

Private or Affordable Sectors

6.8 With regards to the importance of tenure and the contribution that private, social and intermediate tenures make to the completions figures, the following graph summarises the position for each Local Authority. Overall, completions are significantly down on the peak periods but the picture is not consistent across Local Authorities.

Figure 6.3



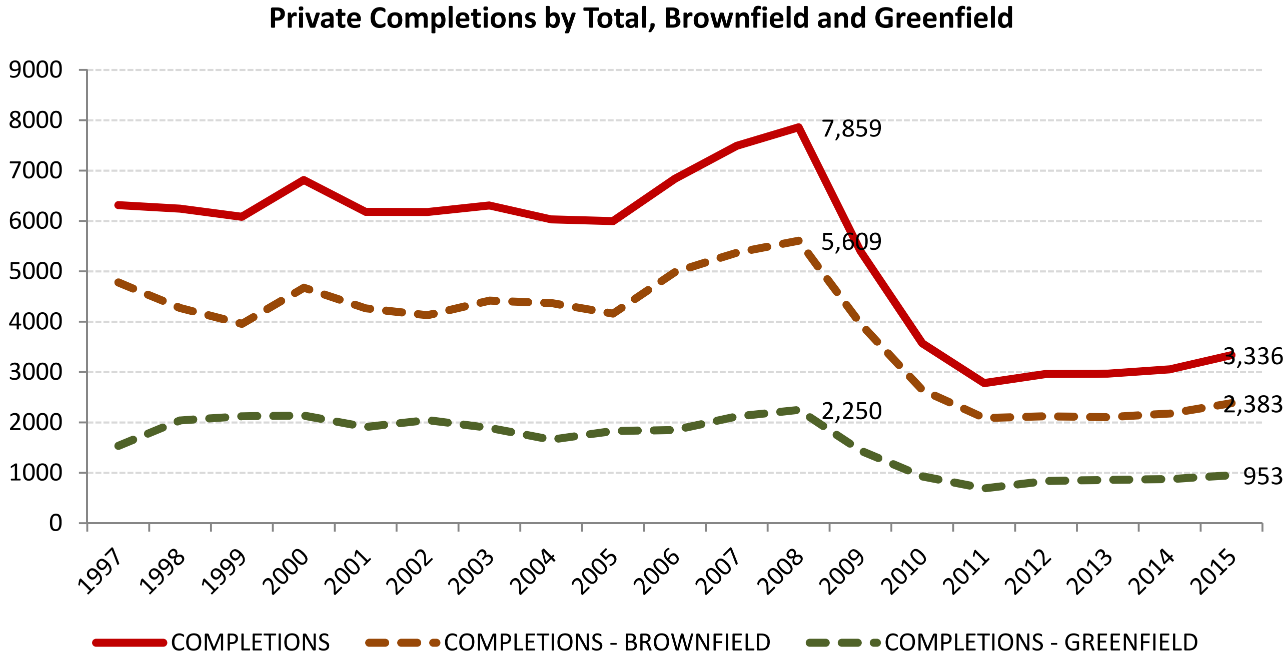
6.9 Clearly Glasgow continues to dominate in terms of total completions. The amount of social rented and intermediate products (65%) compared with private completions (35%) highlights the importance of this sector in Glasgow. on the other hand, East Renfrewshire, Renfrewshire, South Lanarkshire and unusually Inverclyde, are dominated by private sector completions with only 60 affordable products completed in these four Local Authorities from 1,543 completions.

Brownfield/Greenfield

6.10 Examining the private tenure element of completions specifically, the graph below outlines the brownfield/greenfield split. Both elements have experienced a fall in completions from the peak in 2007/08 but the brownfield decrease involves significantly more units (3,226 less compared with 1,297 less – 2007 compared with 2015).

6.11 Also interesting to note is the obvious improvements in brownfield delivery in the 7 years prior to the crash. During the period 2002 to 2008, annual greenfield completions rose by 10% (201 units - from 2,049 to 2,250), but subsequently fell by 62% (~1,400 units) to 876 completions this year. This is in comparison to annual brownfield completions which rose 35% (~1,500 units) from 4,129 to 5,609 prior to the crash before subsequently falling by nearly 60%. Clearly the crash affected both elements of the supply with similar severity but the brownfield element seems to have benefitted most from the peak build conditions.

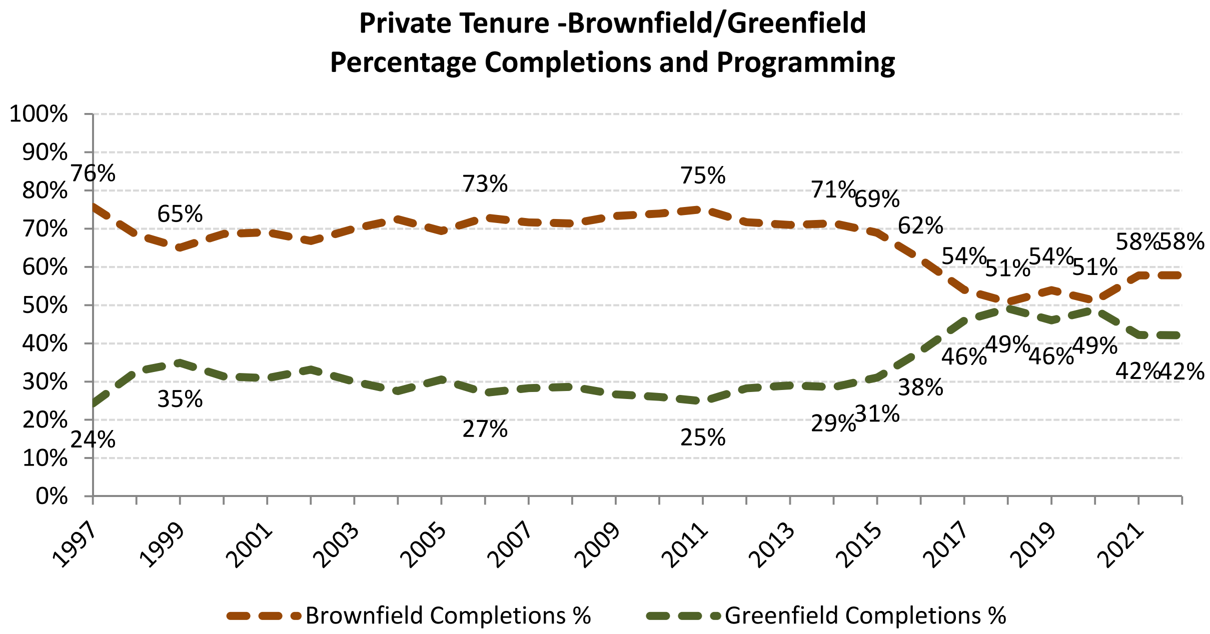
Figure 6.4



6.12 Setting aside the general fall in delivery, the proportion of brownfield and greenfield completions has been maintained throughout the peak and fall of 2002 to 2014 at around 75%/25%. For 2015, 71% of completions were brownfield while 29% were greenfield. (figure 6.3)

6.13 Differing from 2014, this year's programming suggests that the narrowing gap between brownfield and greenfield, will begin to widen again from 2020 onwards. A number of indicators including completions and programming are beginning to reflect more confidence regarding the general outlook, and this estimated improvement in brownfield delivery perhaps confirms this increasing optimism. Figure 6.3 below extends to the programmed period 2015 to 2021.

Figure 6.5



6.14 While other factors, such as windfall additions, may have an effect on raising brownfield completions (and so maintaining a wider gap) the general direction in relation to programming of sites in the audit, is towards an increasing reliance on proportionately more greenfield units for delivery. This may be reflecting some of the anticipated reliance on the delivery of the CGAs over the next 7 years but the wider potential policy implications with regards to brownfield regeneration will be important to revisit as time progresses.

Housing-Sub Market Areas

6.15 The following table summarises delivery in private sector completions within the housing-sub market areas (HSMAs):

Figure 6.6, Completions by Housing Sub Market Area						
	PRIVATE		Affordable		Total	
	Units	%	Units	%	Units	%
Glasgow East	300	9%	628	38%	928	19%
Greater Glasgow South	449	13%	338	20%	787	16%
Renfrewshire	524	16%	26	2%	550	11%
Greater Glasgow North West	296	9%	238	14%	534	11%
Strathkelvin/Glasgow North East	236	7%	177	11%	413	8%
Motherwell	324	10%	0	0%	324	6%
Hamilton	304	9%	0	0%	304	6%
Cumbernauld	158	5%	131	8%	289	6%
Airdrie and Coatbridge	259	8%	14	1%	273	5%
Dumbarton/Vale of Leven HMA	138	4%	69	4%	207	4%
East Kilbride	173	5%	33	2%	206	4%
Inverclyde HMA	111	3%	1	0%	112	2%
Clydesdale	64	2%	0	0%	64	1%
Grand Total	3336	100%	1655	100%	4991	100%

NB HSMA names have now been updated and differ from those used in Figure 3.3

6.16 This year, Glasgow East HSMA dominates completions overall with 19% more down to the significant contribution from the affordable sector. Greater Glasgow South is the next highest performing in completions also helped by strong affordable sector completions. Locations that have performed well include the commonwealth games village and the Baillieston/Broomhouse/Carmyle CGA.

6.17 In Greater Glasgow South, completions were driven by major developments in Laurieston, Newton CGA and Greenlaw Urban Expansion Area in Newton Mearns. Elsewhere the Bishopton CGA is producing completions faster than had been anticipated contributing to Renfrewshire being the highest performing Sub Market area for private sector completions.

6.18 Note: The geographies, populations and other demographics of each of these areas differ significantly making direct comparisons between for example, rural and urban areas, less appropriate.

7 General Outlook

7.1 The graph below (Figure 7.1) provides completions from 1999 to 2015 alongside estimated programming for the next 7 years.

7.2 The general outlook is one of more programmed private units overall compared with 2014 and higher levels of anticipated annual completions compared with the build rates achieved in 2015.

7.3 The private tenure outlook suggests a higher level of completions in 2016 than there were in 2015 (3,623 compared with 3,336), then annual rises to 18/19 when growth falls back. Average growth over the projection period for the private sector is approximately 6% per annum.

7.4 Whilst the rise and dramatic fall of the private sector follows a clear pattern paralleling the wider economy, the picture in respect of the social sector is less distinctive. Social sector funding and delivery is not subject to the same market drivers and external economic factors affecting the private sector. Land for social sector housing is often from the public estate, funding is from government, and delivery is not dependent on sales as is the case with the private sector.

7.5 Essentially therefore when government funding is available, this results in speedy delivery in the social sector. As sites, funding and planning permissions are made available, social sector housing sites are built out and occupied rapidly. This is quite different to the private sector where delivery and occupation are highly subject to market conditions, market confidence and the lending environment in respect of development finance and particularly mortgage lending.

7.6 The land supply also follows differing patterns within the social sector as compared with the private sector. Strategic Housing Investment Plans and associated government funding that drives delivery in this sector, tend to look at a shorter term horizon of 3-5 years. Land often becomes available through the public sector land disposal programmes or through affordable housing negotiations, and again therefore the land may well not appear in the land supply until closer to the point of delivery. Windfall is another source of land for this sector including from redevelopment of brownfield sites. This is evidenced in Figure 7.1(b) which shows a decline in the longer term affordable housing supply from 2019 onwards.

Figure 7.1

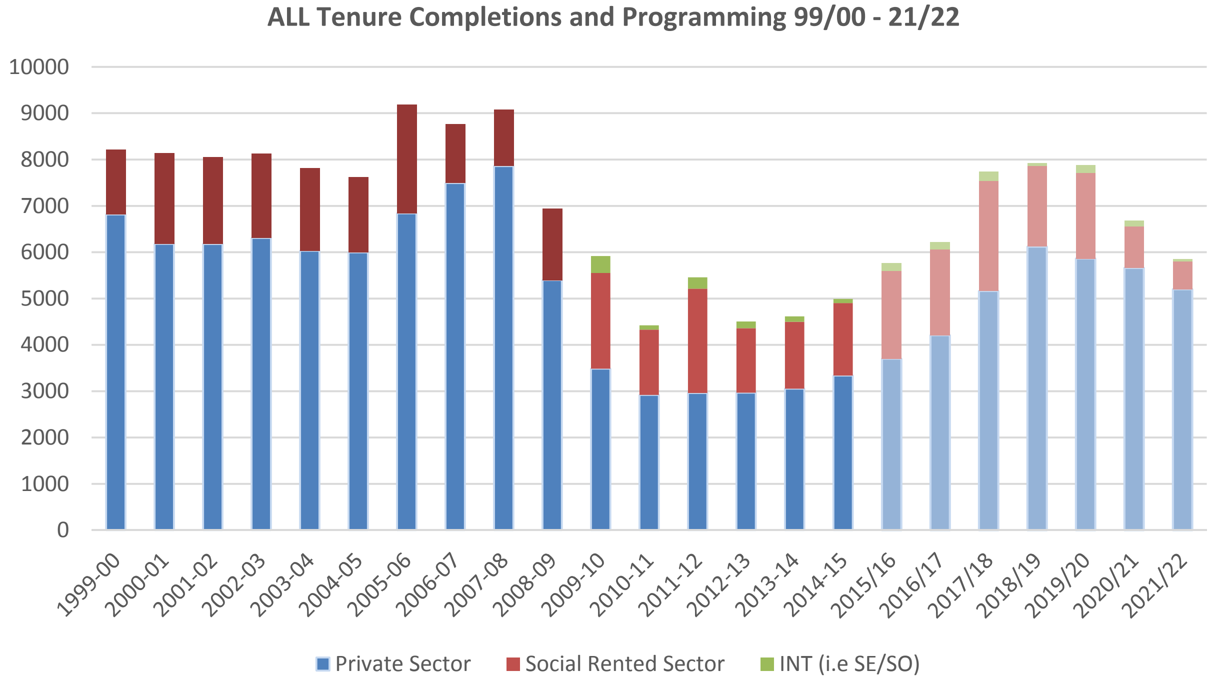


Figure 7.1(a)

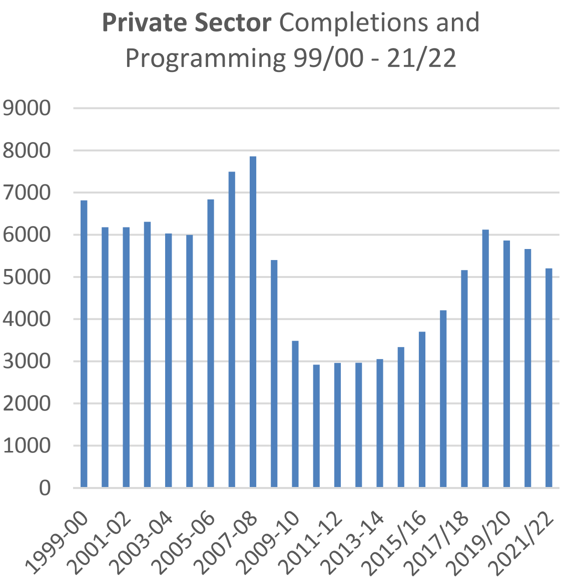
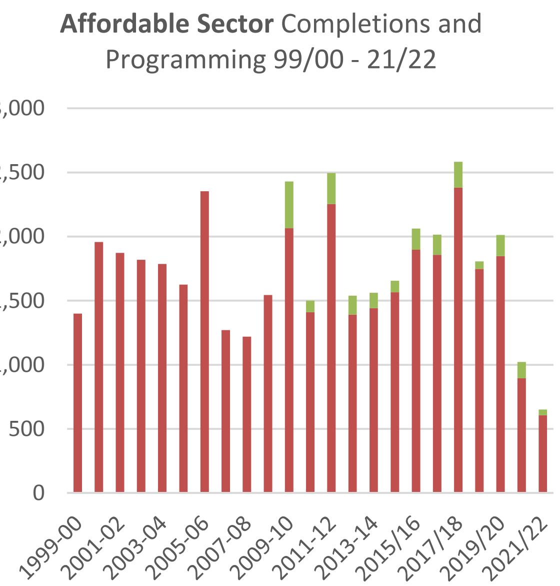


Figure 7.1(b)



Note:

- Social sector completions from 1999 – 2009 are sourced from the NB1 returns collated and published by the Scottish Government. All other data is sourced from the Clydeplan housing land audit.
- Intermediate products have only been identified in the return since 2009/10.
- The total completions for the period prior to 2009 is based on differing survey methods and therefore indicative.

8 Concluding Observations

8.1 Although delivery remains generally low, within the development corridor which is a key focus of the spatial development strategy of Clydeplan, delivery has improved since last year and looks set to continue at levels of around 1,600 homes per annum. (Figure 2.2) This year delivery is focused on major regeneration initiatives at the Commonwealth Games Village, Laurieston, and identified Urban Expansion Areas and Community Growth Areas at locations including Bishopton, Baillieston, Newton and Newton Mearns. From slow beginnings, the Community Growth Areas are beginning to deliver units in more significant numbers with activity expected in 5 CGAs in the next year and output increasing up to over 1,000 units in the year 2018/19 (Figure 2.5) (Section 2)

8.2 The number of units in the established land supply has remained relatively static at a historically high scale at over 113,000 units (Figure 1). Additions to the supply combined with site capacity increases, have compensated for completions and sites deallocated (Section 3). Completions have improved but are still at historically low levels within the private sector. Since 2009/10 the average for that period is around 5,400 units per year, whereas last year (2014/15) they were only 3,336 (Figure 3.6). Social sector completions were slightly above average at 1,800 (Figure 3.7) (Section 3).

8.3 The private established supply remains at around 95,000 units which is a historic high scale having increased by 68% in the last 19 years. The number of private sector units considered 'effective' has remained relatively stable currently at around 36,000 units (Figure 4.5).

8.4 Whilst the scale of the land supply regarded as effective increased significantly in the period leading up to the peak in 2007/08, and over other periods has been rarely below 35,000, the proportion that results in delivery has varied and generally reduced over time. The same amount of land supply in 2015 is delivering proportionately only half what was delivered in the late nineties, 8% now in 2015 and 18% in 1997 (Figure 4.6). Over 45,000 units have the benefit of planning permission and of those 13,000 are under construction (Figure 4.7). The majority (94%) of the land supply is not disputed by Homes for Scotland (Figure 5.2). Given the scale of the land supply available and analysis of delivery trends, it follows that provision of a substantial land supply is not on its own sufficient to achieve the scale of delivery sought and that other activities and measures, beyond land use planning are required to improve delivery particularly within the private sector.

8.5 Persimmon, Taylor Wimpey and Glasgow Housing Association are planning to build the largest amount of housing in the effective period. Of the private tenure units built last year, 65% have been in the survey for between 5 and 15 years and only 9% were 5 years or younger. (Figure 6.2) Of the local authorities, the largest number of homes built last year were in Glasgow where the social rented sector makes a significant contribution. (Figure 6.3)

8.6 There is a large remaining supply of brownfield land which continues to yield delivery of 71% in the private sector and 93% in the affordable sector (79% overall) (Figure 6.4). This aligns with the overall spatial strategy of the SDP to promote development in sustainable locations and reduce the carbon footprint of the city region.

8.7 However, in line with overall trends, delivery of private sector brownfield development has declined significantly since the peak. Trend graphs show that in the boom period prior to the peak, delivery of brownfield land improved more so than greenfield, and it follows that it may be more difficult to deliver this development during recessionary or depressed periods of delivery (Figure 6.4). Social sector delivery remains relatively buoyant and the proportion of social sector land regarded as effective and deliverable within 7 years (68% - 12,152 effective compared with 17,872 established (Figure 3.5c) is much higher than compared with the private sector (38%). Therefore supporting private sector delivery in brownfield locations remains an important policy objective.

8.8 In terms of the outlook, in the early years of the projection period the affordable sector is projected to continue to play a strong role in delivery with over 1,900 units per year in the next 5 years.. Private sector programming in the short term shows signs of optimism with growth averaging 14% per annum over the next 4 years, and 6% per annum over the next seven years. Total programming is estimated to average 6,800 units per annum over the next 7 years and land exist to accommodate that scale of delivery (Figure 7).

8.9 Although not previously monitored, the growth in student housing within the city has been significant and given its potential impact on the housing system, it merits closer analysis in future years.

8.10 In a general sense a number of indicators are positive and suggest a growing confidence within the industry that the market is improving and that higher levels of delivery are anticipated. These include completions last year, CGAs that are now delivering, accelerated funding for social sector housing, and improved programming agreed with the HfS including for brownfield development.

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Note:

- Housing Land Audit Data available on request.
- Minor changes to local authority data may have been made following submission to Clydeplan.
- Data source: \\clydeplanfs1\nt_data\SEC C TOPIC GROUPS\C.2 HOUSING\C.2.10 LAND SUPPLY MONITORING REPORTS\2015\2015 Final Data and Monitoring Clydeplan (May 2017).xlsx.

Note on Tenure Definitions

Unless otherwise stated the definitions below have been applied in the analysis detailed in the Tables 1-20.

Private Sector	Owner Occupied (OO), Private Rental (PR) and Other Tenures Only
Affordable Tenure	Social rented (SR) and Intermediate Tenures (INTTEN)
Intermediate Tenure Sector	Shared Equity, Mid-Market Rent (private), Unsubsidised Low Cost Housing and Discount Sale
Social Housing Sector	Local Authority and Registered Social Landlord and Mid-Market Rent (Social and incorporating IRO (Intermediate Rent Other) products)
All Tenure	Private + Affordable - (i.e. all housing of any tenure)

In 2015, all units were assigned to a tenure and none were recorded as “Tenure not Specified”.

Note:

- More detailed definitions of tenures like social mid-market rent can be found in the Housing Land Audit Guidance 2015 notes.

ANNEX 1A - Private Sector Housing Land Supply – 2015

TABLE 1: PRIVATE SECTOR: ESTABLISHED LAND SUPPLY 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
HOUSING MARKET AREAS					
1st Tier Housing Market Area					
Conurbation	89,848	52,621	59%	37,227	41%
2nd Tier Housing Market Areas					
Central Conurbation HMA	66,111	40,617	61%	25,494	39%
Eastern Conurbation HMA	23,737	12,004	51%	11,733	49%
2nd Tier Total	**89,848**	**52,621**	**59%**	**37,227**	**41%**
3rd Tier Sub-Market Areas					
Greater Glasgow North West	15,634	14,239	91%	1,395	9%
Strathkelvin and Glasgow North East	4,612	1,649	36%	2,963	64%
Glasgow East	10,346	7,453	72%	2,893	28%
Cumbernauld	5,316	844	16%	4,472	84%
Greater Glasgow South	13,673	8,427	62%	5,246	38%
Renfrewshire	11,174	7,576	68%	3,598	32%
East Kilbride	5,356	429	8%	4,927	92%
Airdrie and Coatbridge	3,900	2,389	61%	1,511	39%
Motherwell	8,784	6,133	70%	2,651	30%
Clydesdale	4,987	1,952	39%	3,035	61%
Hamilton	6,066	1,530	25%	4,536	75%
3rd Tier Total	**89,848**	**52,621**	**59%**	**37,227**	**41%**
Discrete (self-contained HMAs)					
Dumbarton and Vale of Leven HMA	2,443	2,131	87%	312	13%
Inverclyde HMA	3,113	2,260	73%	853	27%
UNITARY COUNCILS					
East Dunbartonshire	2,265	947	42%	1,318	58%
East Renfrewshire	4,539	1,154	25%	3,385	75%
City of Glasgow	34,704	27,942	81%	6,762	19%
Inverclyde	3,195	2,305	72%	890	28%
North Lanarkshire	18,000	9,366	52%	8,634	48%
Renfrewshire	8,604	6,573	76%	2,031	24%
South Lanarkshire	19,416	4,356	22%	15,060	78%
West Dunbartonshire	4,681	4,369	93%	312	7%
COUNCIL TOTAL	**95,404**	**57,012**	**60%**	**38,392**	**40%**

TABLE 2: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY 2015-22					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
HOUSING MARKET AREAS					
1st Tier Housing Market Area					
Conurbation	33,952	18,304	54%	15,648	46%
2nd Tier Housing Market Areas					
Central Conurbation HMA	26,657	14,245	53%	12,412	47%
Eastern Conurbation HMA	7,295	4,059	56%	3,236	44%
2nd Tier Total	**33,952**	**18,304**	**54%**	**15,648**	**46%**
3rd Tier Sub-Market Areas					
Greater Glasgow North West	4,261	3,697	87%	564	13%
Strathkelvin and Glasgow North East	1,917	737	38%	1,180	62%
Glasgow East	3,982	2,507	63%	1,475	37%
Cumbernauld	2,607	560	21%	2,047	79%
Greater Glasgow South	6,873	3,477	51%	3,396	49%
Renfrewshire	4,691	3,066	65%	1,625	35%
East Kilbride	2,326	201	9%	2,125	91%
Airdrie and Coatbridge	1,447	981	68%	466	32%
Motherwell	2,496	1,813	73%	683	27%
Clydesdale	1,088	364	33%	724	67%
Hamilton	2,264	901	40%	1,363	60%
3rd Tier Total	**33,952**	**18,304**	**54%**	**15,648**	**46%**
Discrete (self-contained HMAs)					
Dumbarton and Vale of Leven HMA	1,008	775	77%	233	23%
Inverclyde HMA	964	615	64%	349	36%
UNITARY COUNCILS					
East Dunbartonshire	1,967	745	38%	1,222	62%
East Renfrewshire	2,353	433	18%	1,920	82%
City of Glasgow	11,145	8,539	77%	2,606	23%
Inverclyde	1,038	654	63%	384	37%
North Lanarkshire	6,550	3,354	51%	3,196	49%
Renfrewshire	3,606	2,725	76%	881	24%
South Lanarkshire	7,506	1,718	23%	5,788	77%
West Dunbartonshire	1,759	1,526	87%	233	13%
COUNCIL TOTAL	**35,924**	**19,694**	**55%**	**16,230**	**45%**

TABLE 3: PRIVATE SECTOR: COMPLETIONS - 2014/15					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
HOUSING MARKET AREAS					
1st Tier Housing Market Area					
Conurbation	3,087	2,174	70%	913	30%
2nd Tier Housing Market Areas					
Central Conurbation HMA	2,136	1,349	63%	787	37%
Eastern Conurbation HMA	951	825	87%	126	13%
2nd Tier Total	**3,087**	**2,174**	**70%**	**913**	**30%**
3rd Tier Sub-Market Areas					
Greater Glasgow North West	296	291	98%	5	2%
Strathkelvin and Glasgow North East	236	99	42%	137	58%
Glasgow East	300	246	82%	54	18%
Cumbernauld	158	55	35%	103	65%
Greater Glasgow South	449	172	38%	277	62%
Renfrewshire	524	431	82%	93	18%
East Kilbride	173	55	32%	118	68%
Airdrie and Coatbridge	259	250	97%	9	3%
Motherwell	324	287	89%	37	11%
Clydesdale	64	59	92%	5	8%
Hamilton	304	229	75%	75	25%
3rd Tier Total	**3,087**	**2,174**	**70%**	**913**	**30%**
Discrete (self-contained HMAs)					
Dumbarton and Vale of Leven HMA	138	138	100%	0	0%
Inverclyde HMA	111	71	64%	40	36%
UNITARY COUNCILS					
East Dunbartonshire	249	107	43%	142	57%
East Renfrewshire	148	54	36%	94	64%
City of Glasgow	655	563	86%	92	14%
Inverclyde	111	71	64%	40	36%
North Lanarkshire	741	592	80%	149	20%
Renfrewshire	517	425	82%	92	18%
South Lanarkshire	707	363	51%	344	49%
West Dunbartonshire	208	208	100%	0	0%
COUNCIL TOTAL	**3,336**	**2,383**	**71%**	**953**	**29%**

TABLE 4: PRIVATE SECTOR: 3rd TIER HOUSING SUB-MARKET AREAS SUMMARY									
As at 31 March 2015									
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN									
	ELS - Total	**ELS - Brown**	**ELS - Green**	**Eff - Total**	**Eff - Brown**	**Eff - Green**	**Comp - Total**	**Comp - Brown**	**Comp - Green**
Conurbation (1st Tier HMA)	89,848	52,621	37,227	33,952	18,304	15,648	3,087	2,174	913
Central Conurbation (2nd Tier HMA)	66,111	40,617	25,494	26,657	14,245	12,412	2,136	1,349	787
Greater Glasgow North West (3rd Tier HSMA)	**15,634**	**14,239**	**1,395**	**4,261**	**3,697**	**564**	**296**	**291**	**5**
East Dunbartonshire	*553*	*192*	*361*	*532*	*188*	*344*	*34*	*29*	*5*
Glasgow City	*12,843*	*11,809*	*1,034*	*2,978*	*2,758*	*220*	*192*	*192*	*0*
West Dunbartonshire	*2,238*	*2,238*	*0*	*751*	*751*	*0*	*70*	*70*	*0*
Strathkelvin and Glasgow North East (3rd Tier HSMA)	**4,612**	**1,649**	**2,963**	**1,917**	**737**	**1,180**	**236**	**99**	**137**
East Dunbartonshire	*1,712*	*755*	*957*	*1,435*	*557*	*878*	*215*	*78*	*137*
Glasgow City	*2,900*	*894*	*2,006*	*482*	*180*	*302*	*21*	*21*	*0*
Glasgow East (3rd Tier HSMA)	**10,346**	**7,453**	**2,893**	**3,982**	**2,507**	**1,475**	**300**	**246**	**54**
Cumbernauld (3rd Tier HSMA)	**5,316**	**844**	**4,472**	**2,607**	**560**	**2,047**	**158**	**55**	**103**
Greater Glasgow South (3rd Tier HSMA)	**13,673**	**8,427**	**5,246**	**6,873**	**3,477**	**3,396**	**449**	**172**	**277**
East Renfrewshire	*2,051*	*196*	*1,855*	*1,342*	*131*	*1,211*	*141*	*48*	*93*
Glasgow City	*8,615*	*7,786*	*829*	*3,703*	*3,094*	*609*	*142*	*104*	*38*
South Lanarkshire	*3,007*	*445*	*2,562*	*1,828*	*252*	*1,576*	*166*	*20*	*146*
Renfrewshire (3rd Tier HSMA)	**11,174**	**7,576**	**3,598**	**4,691**	**3,066**	**1,625**	**524**	**431**	**93**
East Renfrewshire	*2,488*	*958*	*1,530*	*1,011*	*302*	*709*	*7*	*6*	*1*
Inverclyde	*82*	*45*	*37*	*74*	*39*	*35*	*0*	*0*	*0*
Renfrewshire	*8,604*	*6,573*	*2,031*	*3,606*	*2,725*	*881*	*517*	*425*	*92*
East Kilbride (3rd Tier HSMA)	**5,356**	**429**	**4,927**	**2,326**	**201**	**2,125**	**173**	**55**	**118**
Eastern Conurbation (2nd Tier HMA)	23,737	12,004	11,733	7,295	4,059	3,236	951	825	126
Airdrie and Coatbridge (3rd Tier HSMA)	**3,900**	**2,389**	**1,511**	**1,447**	**981**	**466**	**259**	**250**	**9**
Motherwell (3rd Tier HSMA)	**8,784**	**6,133**	**2,651**	**2,496**	**1,813**	**683**	**324**	**287**	**37**
Clydesdale (3rd Tier HSMA)	**4,987**	**1,952**	**3,035**	**1,088**	**364**	**724**	**64**	**59**	**5**
Hamilton (3rd Tier HSMA)	**6,066**	**1,530**	**4,536**	**2,264**	**901**	**1,363**	**304**	**229**	**75**
Discrete HMAs									
Dumbarton and Vale of Leven (Discrete HMA)	2,443	2,131	312	1,008	775	233	138	138	0
Inverclyde (Discrete HMA)	3,113	2,260	853	964	615	349	111	71	40

TABLE 5: 2015 PRIVATE SECTOR DISPUTED SITES WITH HOMES FOR SCOTLAND			
As at 31 March 2015			
UNITARY COUNCILS	**Private Effective Land Supply**	**Units Disputed**	**% of Private Effective Land Supply Disputed**
East Dunbartonshire	1,967	121	6.2%
East Renfrewshire	2,353	0	0.0%
City of Glasgow	11,145	669	6.0%
Inverclyde	1,038	150	14.5%
North Lanarkshire	6,550	888	13.6%
Renfrewshire	3,606	0	0.0%
South Lanarkshire	7,506	0	0.0%
West Dunbartonshire	1,759	482	27.4%
GCVSDPA TOTAL	**35,924**	**2,310**	**6.4%**

Notes:

- Only Private Sector sites (Owner Occupied and Private Rental) with completions programmed in the effective period (years 1 -7), are included in this table summarising disputes.
- NLC final figures updated (June 2016)

ANNEX 1B - Affordable Sector Housing Land Supply – 2015 (Social rented and Intermediate Tenures)

TABLE 6A: AFFORDABLE SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2015
As at 31 March 2015
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN

	Total	Brownfield		Greenfield	
UNITARY COUNCILS					
East Dunbartonshire	804	311	39%	493	61%
East Renfrewshire	288	148	51%	140	49%
City of Glasgow	8,216	7,293	89%	923	11%
Inverclyde	1,674	1,316	79%	358	21%
North Lanarkshire	2,415	1,161	48%	1,254	52%
Renfrewshire	1,269	1,189	94%	80	6%
South Lanarkshire	2,018	1,073	53%	945	47%
West Dunbartonshire	1,188	1,125	95%	63	5%
COUNCIL TOTAL	**17,872**	**13,616**	76%	**4,256**	24%

TABLE 6B: AFFORDABLE SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2015
As at 31 March 2015
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN

	Total	Brownfield		Greenfield	
UNITARY COUNCILS					
East Dunbartonshire	766	302	39%	464	61%
East Renfrewshire	288	148	51%	140	49%
City of Glasgow	6,195	5,458	88%	737	12%
Inverclyde	758	667	88%	91	12%
North Lanarkshire	1,717	1,119	65%	598	35%
Renfrewshire	362	362	100%	0	0%
South Lanarkshire	1,329	999	75%	330	25%
West Dunbartonshire	737	724	98%	13	2%
COUNCIL TOTAL	**12,152**	**9,779**	80%	**2,373**	20%

TABLE 6C: AFFORDABLE SECTOR - COMPLETIONS TOTAL 2015
As at 31 March 2015
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN

	Total	Brownfield		Greenfield	
UNITARY COUNCILS					
East Dunbartonshire	117	87	74%	30	26%
East Renfrewshire	0	0	0	0	0
City of Glasgow	1,231	1,206	98%	25	2%
Inverclyde	1	1	100%	0	0%
North Lanarkshire	145	110	76%	35	24%
Renfrewshire	26	0	0%	26	100%
South Lanarkshire	33	33	100%	0	0%
West Dunbartonshire	102	102	100%	0	0%
COUNCIL TOTAL	**1,655**	**1,539**	93%	**116**	7%

NB: Affordable Sector– Social rented (SR) and Intermediate Tenures (INTTEN)

TABLE 7A: SOCIAL HOUSING SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	721	278	39%	443	61%
East Renfrewshire	246	148	60%	98	40%
City of Glasgow	7,256	6,503	90%	753	10%
Inverclyde	937	761	81%	176	19%
North Lanarkshire	2,310	1,056	46%	1,254	54%
Renfrewshire	1,269	1,189	94%	80	6%
South Lanarkshire	2,018	1,073	53%	945	47%
West Dunbartonshire	1,173	1,110	95%	63	5%
COUNCIL TOTAL	**15,930**	**12,118**	76%	**3,812**	24%

TABLE 7B: SOCIAL HOUSING SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	683	269	39%	414	61%
East Renfrewshire	246	148	60%	98	40%
City of Glasgow	5,686	5,033	89%	653	11%
Inverclyde	593	502	85%	91	15%
North Lanarkshire	1,612	1,014	63%	598	37%
Renfrewshire	362	362	100%	0	0%
South Lanarkshire	1,329	999	75%	330	25%
West Dunbartonshire	722	709	98%	13	2%
COUNCIL TOTAL	**11,233**	**9,036**	80%	**2,197**	20%

TABLE 7C: SOCIAL HOUSING SECTOR - COMPLETIONS TOTAL 2014					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	116	87	75%	29	25%
East Renfrewshire	0	0	0	0	0
City of Glasgow	1,172	1,149	98%	23	2%
Inverclyde	0	0	0	0	0
North Lanarkshire	116	81	70%	35	30%
Renfrewshire	26	0	0%	26	100%
South Lanarkshire	33	33	100%	0	0%
West Dunbartonshire	102	102	100%	0	0%
COUNCIL TOTAL	**1,565**	**1,452**	93%	**113**	7%

Social Housing Sector (Social Rent) = Local Authority and Registered Social Landlord and Mid-Market Rent (Social and incorporating IRO (Intermediate Rent Other) products)

TABLE 8A: INTERMEDIATE TENURE SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	83	33	40%	50	60%
East Renfrewshire	42	0	0%	42	100%
City of Glasgow	960	790	82%	170	18%
Inverclyde	737	555	75%	182	25%
North Lanarkshire	105	105	100%	0	0%
Renfrewshire	0	0	0%	0	0%
South Lanarkshire	0	0	0%	0	0%
West Dunbartonshire	15	15	100%	0	0%
COUNCIL TOTAL	**1,942**	**1,498**	77%	**444**	23%

TABLE 8B: INTERMEDIATE TENURE SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	83	33	40%	50	60%
East Renfrewshire	42	0	0%	42	100%
City of Glasgow	509	425	83%	84	17%
Inverclyde	165	165	100%	0	0%
North Lanarkshire	105	105	100%	0	0%
Renfrewshire	0	0	0%	0	0%
South Lanarkshire	0	0	0%	0	0%
West Dunbartonshire	15	15	100%	0	0%
COUNCIL TOTAL	**919**	**743**	81%	**176**	19%

TABLE 8C: INTERMEDIATE TENURE SECTOR - COMPLETIONS TOTAL 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	1	0	0%	1	100%
East Renfrewshire	0	0	0	0	0
City of Glasgow	59	57	97%	2	3%
Inverclyde	1	1	100%	0	0%
North Lanarkshire	29	29	100%	0	0%
Renfrewshire	0	0	0%	0	0%
South Lanarkshire	0	0	0%	0	0%
West Dunbartonshire	0	0	0%	0	0%
COUNCIL TOTAL	**90**	**87**	97%	**3**	3%

Intermediate Tenure Sector = Shared Equity, Mid-Market Rent (private), Unsubsidised Low Cost Housing and Discount Sale

ANNEX 1C – All Tenure Housing Land Supply – 2015

TABLE 9: All TENURE - ESTABLISHED LAND SUPPLY 2015					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	3,069	1,258	41%	1,811	59%
East Renfrewshire	4,827	1,302	27%	3,525	73%
City of Glasgow	42,920	35,235	82%	7,685	18%
Inverclyde	4,869	3,621	74%	1,248	26%
North Lanarkshire	20,415	10,527	52%	9,888	48%
Renfrewshire	9,873	7,762	79%	2,111	21%
South Lanarkshire	21,434	5,429	25%	16,005	75%
West Dunbartonshire	5,869	5,494	94%	375	6%
COUNCIL TOTAL	**113,276**	**70,628**	**62%**	**42,648**	**38%**

TABLE 10: ALL TENURE - EFFECTIVE LAND SUPPLY 2015/22					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	2,733	1,047	38%	1,686	62%
East Renfrewshire	2,641	581	22%	2,060	78%
City of Glasgow	17,340	13,997	81%	3,343	19%
Inverclyde	1,796	1,321	74%	475	26%
North Lanarkshire	8,267	4,473	54%	3,794	46%
Renfrewshire	3,968	3,087	78%	881	22%
South Lanarkshire	8,835	2,717	31%	6,118	69%
West Dunbartonshire	2,496	2,250	90%	246	10%
COUNCIL TOTAL	**48,076**	**29,473**	**61%**	**18,603**	**39%**

TABLE 11: ALL TENURE - COMPLETIONS 2014/15					
As at 31 March 2015					
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN					
	Total	**Brownfield**		**Greenfield**	
UNITARY COUNCILS					
East Dunbartonshire	366	194	53%	172	47%
East Renfrewshire	148	54	36%	94	64%
City of Glasgow	1,886	1,769	94%	117	6%
Inverclyde	112	72	64%	40	36%
North Lanarkshire	886	702	79%	184	21%
Renfrewshire	543	425	78%	118	22%
South Lanarkshire	740	396	54%	344	46%
West Dunbartonshire	310	310	100%	0	0%
COUNCIL TOTAL	**4991**	**3,922**	**79%**	**1,069**	**21%**

All Tenure = Private + Affordable + Tenure Not Specified (TNS) - (i.e. all housing of any tenure)

ANNEX 1D - HISTORIC TIME SERIES

The following time series tables use the previously published private tenure figures.

TABLE 13: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - TOTAL (2002/09 to 2015/22)														
As at 31 March 2015														
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN														
	2002-09	**2003-10**	**2004-11**	**2005-12**	**2006-13**	**2007-14**	**2008-15**	**2009-16**	**2010-17**	**2011-18**	**2012-19**	**2013-20**	**2014-21**	**2015-22**
HOUSING MARKET AREAS														
1st Tier Housing Market Area														
Conurbation	38,582	40,101	44,794	48,790	56,916	57,947	48,593	37,504	34,632	32,412	30,720	32,588	34,608	33,952
2nd Tier Housing Market Area														
Central Conurbation HMA	28,962	31,220	35,126	39,434	42,306	43,146	35,455	27,523	26,257	24,348	23,939	25,491	26,570	26,657
Eastern Conurbation HMA	9,620	8,881	9,668	9,356	14,610	14,801	13,138	9,981	8,375	8,064	6,781	7,097	8,038	7,295
2nd Tier Total	**38,582**	**40,101**	**44,794**	**48,790**	**56,916**	**57,947**	**48,593**	**37,504**	**34,632**	**32,412**	**30,720**	**32,588**	**34,608**	**33,952**
Discrete (self-contained HMAs)														
Dumbarton and Vale of Leven HMA	1,310	1,730	1,791	2,030	2,168	2,264	1,835	1,750	1,595	1,246	1,207	1,146	1,147	1,008
Inverclyde HMA	1,464	1,319	1,472	1,699	1,867	1,970	1,864	1,700	1,150	1,082	1,055	987	961	964
GCVSDP HMA Total	**41,356**	**43,150**	**48,057**	**52,519**	**60,951**	**62,181**	**52,292**	**40,954**	**37,377**	**34,740**	**32,982**	**34,721**	**36,716**	**35,924**
UNITARY COUNCILS														
East Dunbartonshire	454	1,130	1,013	1,132	1,738	1,768	1,621	1,457	1,569	1,721	1,564	1,534	1,501	1,967
East Renfrewshire	1,357	1,376	1,523	1,500	1,545	1,491	1,763	1,431	1,337	1,204	1,108	2,069	2,225	2,353
City of Glasgow	16,505	18,162	21,284	24,670	24,706	24,960	18,060	13,665	13,807	12,971	13,338	11,365	12,225	11,145
Inverclyde	1,554	1,394	1,526	1,748	1,899	2,041	1,937	1,779	1,229	1,172	1,133	1,021	1,013	1,038
North Lanarkshire	6,628	7,204	7,280	7,242	9,426	8,740	6,722	6,379	6,122	6,696	7,045	7,334	7,315	6,550
Renfrewshire	3,923	3,949	4,060	4,212	4,478	5,321	4,896	3,684	3,712	2,883	2,296	4,256	3,916	3,606
South Lanarkshire	8,721	7,257	8,134	8,564	13,328	14,075	14,092	10,019	7,378	6,268	4,723	5,382	6,838	7,506
West Dunbartonshire	2,214	2,678	3,237	3,451	3,831	3,785	3,201	2,540	2,223	1,825	1,775	1,760	1,683	1,759
COUNCIL TOTAL	**41,356**	**43,150**	**48,057**	**52,519**	**60,951**	**62,181**	**52,292**	**40,954**	**37,377**	**34,740**	**32,982**	**34,721**	**36,716**	**35,924**

TABLE 14: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - BROWNFIELD (2002/09 to 2015/22)														
As at 31 March 2015														
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN														
	2002-09	**2003-10**	**2004-11**	**2005-12**	**2006-13**	**2007-14**	**2008-15**	**2009-16**	**2010-17**	**2011-18**	**2012-19**	**2013-20**	**2014-21**	**2015-22**
HOUSING MARKET AREAS														
1st Tier Housing Market Area														
Conurbation	25,767	27,863	32,564	35,874	40,513	41,990	32,510	25,918	23,767	22,130	20,726	20,131	19,861	18,304
2nd Tier Housing Market Area														
Central Conurbation HMA	20,850	23,203	26,898	29,927	31,602	32,960	24,910	19,268	18,339	16,706	15,954	15,425	15,032	14,245
Eastern Conurbation HMA	4,917	4,660	5,666	5,947	8,911	9,030	7,600	6,650	5,428	5,424	4,772	4,706	4,829	4,059
2nd Tier Total	**25,767**	**27,863**	**32,564**	**35,874**	**40,513**	**41,990**	**32,510**	**25,918**	**23,767**	**22,130**	**20,726**	**20,131**	**19,861**	**18,304**
Discrete (self-contained HMAs)														
Dumbarton and Vale of Leven HMA	644	1,239	1,482	1,835	1,891	2,190	1,735	1,635	1,548	1,200	1,164	1,031	907	775
Inverclyde HMA	764	754	819	954	1,292	1,439	1,334	1,189	800	779	741	618	580	615
GCVSDP HMA Total	**27,175**	**29,856**	**34,865**	**38,663**	**43,696**	**45,619**	**35,579**	**28,742**	**26,115**	**24,109**	**22,631**	**21,780**	**21,348**	**19,694**
UNITARY COUNCILS														
East Dunbartonshire	246	828	772	774	1,261	1,241	1,052	943	1,036	1,065	803	674	710	745
East Renfrewshire	113	149	382	339	353	370	572	462	470	416	449	626	457	433
City of Glasgow	13,373	15,093	17,715	20,475	20,761	21,207	14,396	11,084	10,875	9,978	10,323	8,935	9,212	8,539
Inverclyde	846	818	846	974	1,307	1,502	1,397	1,261	870	860	813	648	630	654
North Lanarkshire	3,940	3,916	4,392	4,279	6,119	6,018	4,951	4,490	4,062	4,247	4,166	4,105	3,802	3,354
Renfrewshire	3,342	3,504	3,619	3,836	4,219	4,835	4,370	3,234	3,302	2,595	1,999	3,117	2,994	2,725
South Lanarkshire	4,038	3,465	4,355	4,770	6,182	6,790	5,788	4,852	3,324	3,169	2,346	2,030	2,100	1,718
West Dunbartonshire	1,277	2,083	2,784	3,216	3,494	3,656	3,053	2,416	2,176	1,779	1,732	1,645	1,443	1,526
COUNCIL TOTAL	**27,175**	**29,856**	**34,865**	**38,663**	**43,696**	**45,619**	**35,579**	**28,742**	**26,115**	**24,109**	**22,631**	**21,780**	**21,348**	**19,694**
% of Effective Land Supply	**66%**	**69%**	**73%**	**74%**	**72%**	**73%**	**68%**	**70%**	**70%**	**69%**	**69%**	**63%**	**58%**	**55%**

TABLE 15: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - GREENFIELD (2002/09 to 2015/22)														
As at 31 March 2015														
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN														
	2002-09	**2003-10**	**2004-11**	**2005-12**	**2006-13**	**2007-14**	**2008-15**	**2009-16**	**2010-17**	**2011-18**	**2012-19**	**2013-20**	**2014-21**	**2015-22**
HOUSING MARKET AREAS														
1st Tier Housing Market Area														
Conurbation	12,815	12,238	12,230	12,916	16,403	15,957	16,083	11,586	10,865	10,282	9,994	12,457	14,747	15,648
2nd Tier Housing Market Area														
Central Conurbation HMA	8,112	8,017	8,228	9,507	10,704	10,186	10,545	8,255	7,918	7,642	7,985	10,066	11,538	12,412
Eastern Conurbation HMA	4,703	4,221	4,002	3,409	5,699	5,771	5,538	3,331	2,947	2,640	2,009	2,391	3,209	3,236
2nd Tier Total	**12,815**	**12,238**	**12,230**	**12,916**	**16,403**	**15,957**	**16,083**	**11,586**	**10,865**	**10,282**	**9,994**	**12,457**	**14,747**	**15,648**
Discrete (self-contained HMAs)														
Dumbarton and Vale of Leven HMA	666	491	309	195	277	74	100	115	47	46	43	115	240	233
Inverclyde HMA	700	565	653	745	575	531	530	511	350	303	314	369	381	349
GCVSDP HMA Total	**14,181**	**13,294**	**13,192**	**13,856**	**17,255**	**16,562**	**16,713**	**12,212**	**11,262**	**10,631**	**10,351**	**12,941**	**15,368**	**16,230**
UNITARY COUNCILS														
East Dunbartonshire	208	302	241	358	477	527	569	514	533	656	761	860	791	1,222
East Renfrewshire	1,244	1,227	1,141	1,161	1,192	1,121	1,191	969	867	788	659	1,443	1,768	1,920
City of Glasgow	3,132	3,069	3,569	4,195	3,945	3,753	3,664	2,581	2,932	2,993	3,015	2,430	3,013	2,606
Inverclyde	708	576	680	774	592	539	540	518	359	312	320	373	383	384
North Lanarkshire	2,688	3,288	2,888	2,963	3,307	2,722	1,771	1,889	2,060	2,449	2,879	3,229	3,513	3,196
Renfrewshire	581	445	441	376	259	486	526	450	410	288	297	1,139	922	881
South Lanarkshire	4,683	3,792	3,779	3,794	7,146	7,285	8,304	5,167	4,054	3,099	2,377	3,352	4,738	5,788
West Dunbartonshire	937	595	453	235	337	129	148	124	47	46	43	115	240	233
COUNCIL TOTAL	**14,181**	**13,294**	**13,192**	**13,856**	**17,255**	**16,562**	**16,713**	**12,212**	**11,262**	**10,631**	**10,351**	**12,941**	**15,368**	**16,230**
% of Effective Land Supply	**34%**	**31%**	**27%**	**26%**	**28%**	**27%**	**32%**	**30%**	**30%**	**31%**	**31%**	**37%**	**42%**	**45%**

TABLE 16: PRIVATE SECTOR: COMPLETIONS - TOTAL (2002/03 to 2014/15)													
As at 31 March 2015													
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN													
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
HOUSING MARKET AREAS													
1st Tier Housing Market Area													
Conurbation	5,970	5,756	5,745	6,436	7,170	7,473	5,160	3,386	2,633	2,791	2,737	2,837	3,087
2nd Tier Housing Market Area													
Central Conurbation HMA	4,238	3,915	3,689	4,322	5,192	5,361	3,614	2,489	2,072	2,039	2,036	2,107	2,136
Eastern Conurbation HMA	1,732	1,841	2,056	2,114	1,978	2,112	1,546	912	562	752	701	730	951
2nd Tier Total	**5,970**	**5,756**	**5,745**	**6,436**	**7,170**	**7,473**	**5,160**	**3,401**	**2,634**	**2,791**	**2,737**	**2,837**	**3,087**
Discrete (self-contained HMAs)													
Dumbarton and Vale of Leven HMA	99	108	117	206	102	133	79	73	49	89	137	142	138
Inverclyde HMA	240	167	134	196	221	221	150	113	99	81	93	75	111
GCVSDP HMA Total	**6,309**	**6,031**	**5,996**	**6,838**	**7,493**	**7,827**	**5,389**	**3,587**	**2,782**	**2,961**	**2,967**	**3,054**	**3,336**
UNITARY COUNCILS													
East Dunbartonshire	68	143	271	95	98	221	148	29	96	154	241	285	249
East Renfrewshire	132	84	94	41	57	105	99	69	92	101	168	264	148
City of Glasgow	2,406	2,339	2,004	2,704	3,207	3,348	1,874	1,381	1,073	955	802	729	655
Inverclyde	263	193	160	223	237	221	150	115	109	90	95	76	111
North Lanarkshire	1,434	1,316	1,339	1,413	1,278	1,563	1,182	611	456	540	629	686	741
Renfrewshire	442	506	402	440	679	661	635	371	286	282	251	313	517
South Lanarkshire	1,331	1,253	1,551	1,690	1,823	1,516	1,124	876	577	739	638	547	707
West Dunbartonshire	233	197	175	232	114	192	177	135	93	100	143	154	208
COUNCIL TOTAL	**6,309**	**6,031**	**5,996**	**6,838**	**7,493**	**7,827**	**5,389**	**3,587**	**2,782**	**2,961**	**2,967**	**3,054**	**3,336**
% Brownfield	**70%**	**72%**	**69%**	**73%**	**72%**	**71%**	**73%**	**74%**	**75%**	**72%**	**71%**	**71%**	**71%**
% Greenfield	**30%**	**28%**	**31%**	**27%**	**28%**	**29%**	**27%**	**26%**	**25%**	**28%**	**29%**	**29%**	**29%**

TABLE 17: PRIVATE SECTOR: COMPLETIONS - BROWNFIELD (2002/03 to 2014/15)													
As at 31 March 2014													
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN													
	2002/03	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**2008/09**	**2009/10**	**2010/11**	**2011/12**	**2012/13**	**2013/14**	**2014/15**
HOUSING MARKET AREAS													
1st Tier Housing Market Area													
Conurbation	4,235	4,231	4,017	4,705	5,118	**5,248**	3,776	2,515	1,990	1,998	1,916	2,001	2,174
2nd Tier Housing Market Area													
Central Conurbation HMA	3,174	3,258	2,970	3,422	3,864	**3,958**	2,749	1,865	1,512	1,444	1,343	1,389	1,349
Eastern Conurbation HMA	1,061	973	1,047	1,283	1,254	**1,290**	1,027	650	478	554	573	612	825
2nd Tier Total	**4,235**	**4,231**	**4,017**	**4,705**	**5,118**	**5,248**	**3,776**	**2,515**	**1,990**	**1,998**	**1,916**	**2,001**	**2,174**
Discrete (self-contained HMAs)													
Dumbarton and Vale of Leven HMA	15	41	84	193	97	**133**	67	70	48	89	137	142	138
Inverclyde HMA	168	98	62	88	156	**196**	106	73	52	37	53	35	71
GCVSDP HMA Total	**4,418**	**4,370**	**4,163**	**4,986**	**5,371**	**5,577**	**3,949**	**2,658**	**2,090**	**2,124**	**2,106**	**2,178**	**2,383**
UNITARY COUNCILS													
East Dunbartonshire	46	82	159	67	98	**200**	131	24	78	117	166	157	107
East Renfrewshire	33	38	79	16	16	**22**	45	23	34	10	45	91	54
City of Glasgow	2,136	2,166	1,765	2,368	2,682	**2,761**	1,606	1,183	927	743	664	612	563
Inverclyde	188	118	75	105	163	**196**	106	74	62	43	55	35	71
North Lanarkshire	871	877	926	904	724	**900**	735	457	419	471	472	556	592
Renfrewshire	262	421	369	413	595	**612**	577	344	227	271	240	296	425
South Lanarkshire	751	538	648	894	984	**701**	608	430	251	369	321	277	363
West Dunbartonshire	131	130	142	219	109	**185**	141	123	92	100	143	154	208
COUNCIL TOTAL	**4,418**	**4,370**	**4,163**	**4,986**	**5,371**	**5,577**	**3,949**	**2,658**	**2,090**	**2,124**	**2,106**	**2,178**	**2,383**

TABLE 18: PRIVATE SECTOR: COMPLETIONS - GREENFIELD (2002/03 to 2014/15)													
As at 31 March 2014													
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN													
	2002/03	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**2008/09**	**2009/10**	**2010/11**	**2011/12**	**2012/13**	**2013/14**	**2014/15**
HOUSING MARKET AREAS													
1st Tier Housing Market Area													
Conurbation	1,735	1,525	1,728	1,731	2,052	2,225	1,384	886	644	793	821	836	913
2nd Tier Housing Market Area													
Central Conurbation HMA	1,064	657	719	900	1,328	1,403	865	624	560	595	693	718	787
Eastern Conurbation HMA	671	868	1,009	831	724	822	519	262	84	198	128	118	126
2nd Tier Total	**1,735**	**1,525**	**1,728**	**1,731**	**2,052**	**2,225**	**1,384**	**886**	**644**	**793**	**821**	**836**	**913**
Discrete (self-contained HMAs)													
Dumbarton and Vale of Leven HMA	84	67	33	13	5	0	12	3	1	0	0	0	0
Inverclyde HMA	72	69	72	108	65	25	44	40	47	44	40	40	40
GCVSDP HMA Total	**1,891**	**1,661**	**1,833**	**1,852**	**2,122**	**2,250**	**1,440**	**929**	**692**	**837**	**861**	**876**	**953**
UNITARY COUNCILS													
East Dunbartonshire	22	61	112	28	0	21	17	5	18	37	75	128	142
East Renfrewshire	99	46	15	25	41	83	54	46	58	91	123	173	94
City of Glasgow	270	173	239	336	525	587	268	198	146	212	138	117	92
Inverclyde	75	75	85	118	74	25	44	41	47	47	40	41	40
North Lanarkshire	563	439	413	509	554	663	447	154	37	69	157	130	149
Renfrewshire	180	85	33	27	84	49	58	27	59	11	11	17	92
South Lanarkshire	580	715	903	796	839	815	516	446	326	370	317	270	344
West Dunbartonshire	102	67	33	13	5	7	36	12	1	0	0	0	0
COUNCIL TOTAL	**1,891**	**1,661**	**1,833**	**1,852**	**2,122**	**2,250**	**1,440**	**929**	**692**	**837**	**861**	**876**	**953**

ANNEX 1E – PROGRAMMING 2016/22

TABLE 19: PRIVATE TENURE PROGRAMMING 2016-2022												
As at 31 March 2015												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
HOUSING MARKET AREAS	**2015/16**	**2016/17**	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**Effective Total**	**Effective %**	**Post 2022**	**Non-Effective %**	**Established Total**
1st Tier Housing Market Area												
Conurbation	3,423	3,939	4,838	5,797	5,644	5,349	4,962	**33,952**	38%	**55,896**	62%	**89,848**
2nd Tier Housing Market Areas												
Central Conurbation HMA	2,578	3,121	3,685	4,278	4,404	4,409	4,182	26,657	40%	39,454	60%	**66,111**
Eastern Conurbation HMA	845	818	1,153	1,519	1,240	940	780	7,295	31%	16,442	69%	**23,737**
2nd Tier Total	**3,423**	**3,939**	**4,838**	**5,797**	**5,644**	**5,349**	**4,962**	**33,952**	**38%**	**55,896**	**62%**	**89,848**
3rd Tier Sub-Market Areas												
Greater Glasgow North West	251	281	382	667	842	953	885	4,261	27%	11,373	73%	**15,634**
Strathkelvin & Glasgow North East	252	262	342	330	322	211	198	1,917	42%	2,695	58%	**4,612**
Glasgow East	544	575	475	604	621	688	475	3,982	38%	6,364	62%	**10,346**
Cumbernauld	225	363	412	554	438	327	288	2,607	49%	2,709	51%	**5,316**
Greater Glasgow South	689	856	1,069	1,060	1,030	1,071	1,098	6,873	50%	6,800	50%	**13,673**
Renfrewshire	489	609	712	677	714	724	766	4,691	42%	6,483	58%	**11,174**
East Kilbride	128	175	293	386	437	435	472	2,326	43%	3,030	57%	**5,356**
Airdrie and Coatbridge	192	192	226	290	214	173	160	1,447	37%	2,453	63%	**3,900**
Motherwell	285	228	349	598	441	318	277	2,496	28%	6,288	72%	**8,784**
Clydesdale	118	125	184	228	194	142	97	1,088	22%	3,899	78%	**4,987**
Hamilton	250	273	394	403	391	307	246	2,264	37%	3,802	63%	**6,066**
3rd Tier Total	**3,423**	**3,939**	**4,838**	**5,797**	**5,644**	**5,349**	**4,962**	**33,952**	**38%**	**55,896**	**62%**	**89,848**
Discrete (self-contained HMAs)												
Dumbarton & Vale of Leven HMA	144	132	152	161	101	173	145	**1,008**	41%	**1,435**	59%	**2,443**
Inverclyde HMA	134	138	173	163	120	140	96	**964**	31%	**2,149**	69%	**3,113**

TABLE 20: ALL TENURE PROGRAMMING BY LOCAL AUTHORITY 2016-2022												
As at 31 March 2015												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
	2015/16	**2016/17**	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**Effective Total**	**Effective %**	**Post 2022**	**Non-Effective %**	**Established Total**
East Dunbartonshire	381	435	673	604	449	123	68	2,733	89%	336	11%	**3,069**
East Renfrewshire	287	377	447	425	421	371	313	2,641	55%	2,186	45%	**4,827**
City of Glasgow	2,403	2,356	2712	2260	2738	2640	2231	17,340	40%	25,580	60%	**42,920**
Inverclyde	226	246	297	288	271	264	204	1,796	37%	3,073	63%	**4,869**
North Lanarkshire	860	1,139	1245	1714	1472	1005	832	8,267	40%	12,148	60%	**20,415**
Renfrewshire	577	562	630	518	526	545	610	3,968	40%	5,905	60%	**9,873**
South Lanarkshire	754	827	1372	1712	1603	1328	1239	8,835	41%	12,599	59%	**21,434**
West Dunbartonshire	276	282	370	406	397	408	357	2,496	43%	3,373	57%	**5,869**
COUNCIL TOTAL	**5,764**	**6,224**	**7,746**	**7,927**	**7,877**	**6,684**	**5,854**	**48,076**	42%	**65,200**	**58%**	**113,276**

TABLE 20A: PRIVATE TENURE PROGRAMMING BY LOCAL AUTHORITY 2015-2021												
As at 31 March 2014												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
	2015/16	**2016/17**	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**Effective Total**	**Effective %**	**Post 2022**	**Non-Effective %**	**Established Total**
East Dunbartonshire	293	327	422	405	334	118	68	1,967	87%	298	13%	**2,265**
East Renfrewshire	220	320	416	375	371	348	303	2,353	52%	2,186	48%	**4,539**
City of Glasgow	1,052	1,184	1194	1570	1822	2242	2081	11,145	32%	23,559	68%	**34,704**
Inverclyde	136	151	184	177	142	152	96	1,038	32%	2,157	68%	**3,195**
North Lanarkshire	702	783	987	1442	1093	818	725	6,550	36%	11,450	64%	**18,000**
Renfrewshire	453	501	556	498	510	508	580	3,606	42%	4,998	58%	**8,604**
South Lanarkshire	680	770	1168	1345	1306	1153	1084	7,506	39%	11,910	61%	**19,416**
West Dunbartonshire	165	173	236	309	287	323	266	1,759	38%	2,922	62%	**4,681**
COUNCIL TOTAL	**3,701**	**4,209**	**5,163**	**6,121**	**5,865**	**5,662**	**5,203**	**35,924**	38%	**59,480**	**62%**	**95,404**

TABLE 20B: AFFORDABLE TENURE PROGRAMMING BY LOCAL AUTHORITY 2015-2021												
As at 31 March 2014												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	Effective Total	Effective %	Post 2022	Non-Effective %	Established Total
East Dunbartonshire	88	108	251	199	115	5	0	766	95%	38	5%	**804**
East Renfrewshire	67	57	31	50	50	23	10	288	100%	0	0%	**288**
City of Glasgow	1,351	1,172	1,518	690	916	398	150	6,195	75%	2,021	25%	**8,216**
Inverclyde	90	95	113	111	129	112	108	758	45%	916	55%	**1,674**
North Lanarkshire	158	356	258	272	379	187	107	1,717	71%	698	29%	**2,415**
Renfrewshire	124	61	74	20	16	37	30	362	29%	907	71%	**1,269**
South Lanarkshire	74	57	204	367	297	175	155	1,329	66%	689	34%	**2,018**
West Dunbartonshire	111	109	134	97	110	85	91	737	62%	451	38%	**1,188**
COUNCIL TOTAL	**2,063**	**2,015**	**2,583**	**1,806**	**2,012**	**1,022**	**651**	**12,152**	68%	**5,720**	**32%**	**17,872**

TABLE 20B(i): SOCIAL HOUSING SECTOR PROGRAMMING BY LOCAL AUTHORITY 2015-2021												
As at 31 March 2014												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	Effective Total	Effective %	Post 2022	Non-Effective %	Established Total
East Dunbartonshire	47	95	234	199	103	5	0	683	95%	38	5%	**721**
East Renfrewshire	57	36	20	50	50	23	10	246	100%	0	0%	**246**
City of Glasgow	1,272	1,100	1,405	654	809	306	140	5,686	78%	1,570	22%	**7,256**
Inverclyde	71	95	98	96	83	77	73	593	63%	344	37%	**937**
North Lanarkshire	142	304	228	265	379	187	107	1,612	70%	698	30%	**2,310**
Renfrewshire	124	61	74	20	16	37	30	362	29%	907	71%	**1,269**
South Lanarkshire	74	57	204	367	297	175	155	1,329	66%	689	34%	**2,018**
West Dunbartonshire	111	109	119	97	110	85	91	722	62%	451	38%	**1,173**
COUNCIL TOTAL	**1,898**	**1,857**	**2,382**	**1,748**	**1,847**	**895**	**606**	**11,233**	71%	**4,697**	**29%**	**15,930**

TABLE 20B(ii): INTERMEDIATE HOUSING SECTOR PROGRAMMING BY LOCAL AUTHORITY 2015-2021												
As at 31 March 2014												
GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN												
	Effective									Non-Effective		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	Effective Total	Effective %	Post 2021	Non-Effective %	Established Total
East Dunbartonshire	41	13	17	0	12	0	0	83	100%	0	0%	**83**
East Renfrewshire	10	21	11	0	0	0	0	42	100%	0	0%	**42**
City of Glasgow	79	72	113	36	107	92	10	509	53%	451	47%	**960**
Inverclyde	19	0	15	15	46	35	35	165	22%	572	78%	**737**
North Lanarkshire	16	52	30	7	0	0	0	105	100%	0	0%	**105**
Renfrewshire	0	0	0	0	0	0	0	0	0%	0	0%	**0**
South Lanarkshire	0	0	0	0	0	0	0	0	0%	0	0%	**0**
West Dunbartonshire	0	0	15	0	0	0	0	15	100%	0	0%	**15**
COUNCIL TOTAL	**165**	**158**	**201**	**58**	**165**	**127**	**45**	**919**	47%	**1,023**	**53%**	**1,942**

Clydeplan

Glasgow and the Clyde Valley
Strategic Development Planning Authority

May 2017