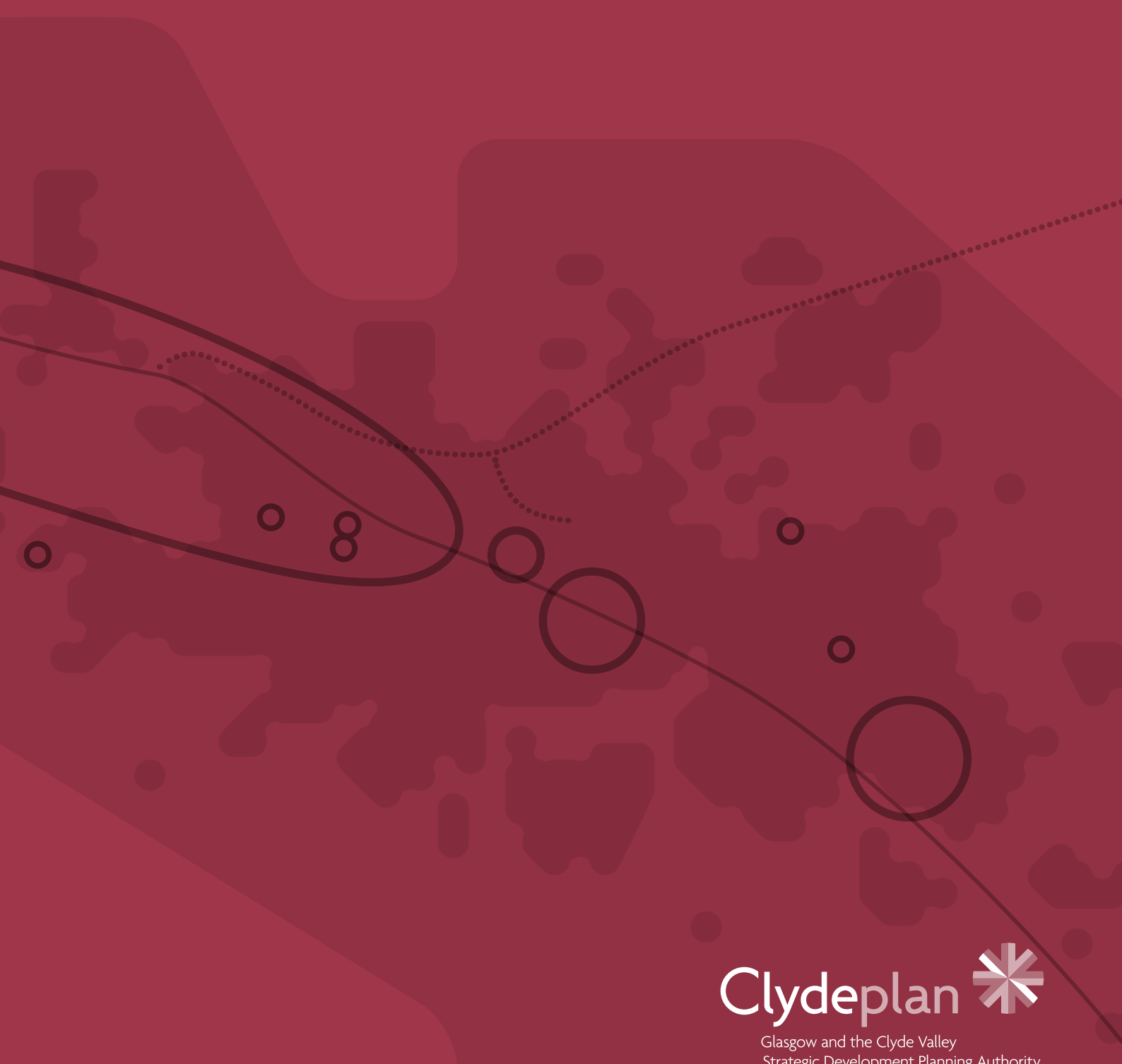
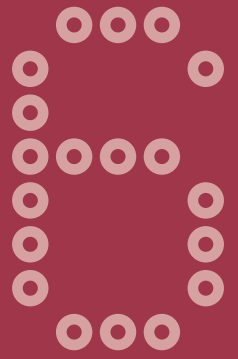


Strategic Development Plan

Proposed Plan - Background Report

January 2016

Strategic Economic Investment Locations





STRATEGIC DEVELOPMENT PLAN

PROPOSED PLAN

BACKGROUND REPORT 6

Strategic Economic Investment Locations

January 2016

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Introduction

This Background Report, as part of the Strategic Development Plan (SDP) process, provides the detail and the policy approach of the network of Strategic Economic Investment Locations (SEILs) and Strategic Freight Transport Hubs (SFTH) in the city region as outlined within the 'City Region as a Successful Place' section of the SDP.

The Spatial Development Strategy identifies 22 SEILs which will support the long term vision of a rebalanced low carbon economy, boosting competitiveness and tackling inequality. The SEILs have been selected because they are the priority locations to promote the Scottish Government's key economic sectors and Scottish Enterprise's locational priorities, and are in sustainable locations. The Report also identifies Strategic Freight Transport Hubs. It will demonstrate how the SEILs and SFTHs support the SDP's ambition for a rebalanced low carbon economy for the city-region and its focus on key existing and new economic sectors.

The primary SEIL is Glasgow City Centre in relation to its dominant roles and functions and its surrounding areas with their employment districts, University campuses, related research and development, cultural quarters, and emerging new green technology focus. The City Centre's inherent accessibility by sustainable transport and its mix of economic activity and employment results in an ability to meet a wide range of economic roles and functions and be the centre for the new low carbon sustainable economy.

The SEILs package of key strategic locations focused on the future key economic sectors does not preclude other economic activity sites being promoted and developed through Local Development Plans in response to local requirements. The Spatial Development Strategy requires focusing on key strategic industrial and business locations and priorities. Local development plans will articulate the detailed policies and proposals to implement the strategic vision.

The Scottish Government's *Economic Strategy* gives clear priority to accelerating economic recovery, with a range of measures to tackle inequality and promote competitiveness. It focuses on actions on four aims to deliver sustainable economic growth and develop a more resilient and adaptable economy. These are:

- Investment;
- Innovation;
- Inclusive growth;
- Internationalisation;

The SDP is the spatial geography of that strategy in the GCV city region and focuses on achieving these aims through the identification and delivery of strategic economic locations and their supporting infrastructure.

The economy of the city region is starting to show signs of recovery following the recession however it is recognised that any recovery will be over an extended period. The city region economy continues to rebalance itself by focussing upon and supporting the Scottish Government's key economic sectors.

This report is split into six sections. This first is the introduction above and the remaining sections are as follows:

- Section 2 – sets out the policy context for the SEILs and supporting infrastructure
- Section 3 – outlines the Oxford Economic projections report, commissioned by Clydeplan, which sets out the economic context for the city region up to 2038. This provides the economic projections options for the SDP.
- Section 4 – is the overview of the existing SEILs and supporting infrastructure and the methodology adopted and supporting evidence
- Section 5 – identifies the policy approach for both the SEILs and SFTHs
- Section 6 – is the consultation and review section which identifies the next steps in the development plan process

2. Policy Context

This section sets out the policy context for the SDP and its network of Strategic Economic Investment Locations (SEILs) and supporting infrastructure.

2.1 Policy framework

The following elements are required to be considered and have informed the policy approach adopted for the SDP.

- Governments Economic Strategy (GES)¹
- National Planning Framework 3² and Action Programme³
- Scottish Enterprise⁴
- Scottish Planning Policy⁵
- National Renewable Infrastructure Plan⁶

2.2 Policy changes since SDP 1 (May 2012)

There have been a number of changes in the policy landscape since SDP 1 that are reflected in the SDP. These are:

- The need to reflect 'significant business clusters' and 'clusters of industries that handle hazardous substances'
- The requirement to identify National Renewable Infrastructure Plan locations and Enterprise Zone designations and nationally or regionally important locations for tourism or leisure development
- The emergence of a greater emphasis on the tourism sector

2.3 The Strategic Development Plan (SDP)⁷

The Scottish Government recognises the potential contribution city regions make to the sustainable economic growth of Scotland. SDPs are expected to be concise visionary documents. They should set out a vision for the long term development of the city regions and deal with cross boundary issues such as housing strategic infrastructure including transport, water supply and waste water and strategic green networks including green belts and set clear parameters for subsequent Local Development Plans.

SDPs are approved by Scottish Ministers and should be aligned with the policy context set out in both NPF3 and SPP. SDP's are required to be reviewed and resubmitted to Scottish Ministers within 4 years of their approval.

¹ <http://www.gov.scot/Resource/0047/00472389.pdf>

² <http://www.gov.scot/Resource/0045/00453683.pdf>

³ <http://www.scotland.gov.uk/Topics/Built-Environment/planning/NPF3-SPP-Review/NPF3-documents/DraftActionProg>

⁴ <http://www.scottish-enterprise.com/about%20us/what%20we%20do/business%20plan>

⁵ <http://www.gov.scot/Resource/0045/00453827.pdf>

⁶ <http://www.gov.scot/Publications/2015/03/7221/3>

⁷ Please see www.clydeplan-sdpa.gov.uk/proposedplan2016

2036 Vision
The place we want to create:

By 2036 Glasgow and the Clyde Valley will be a resilient, sustainable compact city region attracting and retaining investment, improving the quality of life for people and reducing inequalities through the creation of a place which maximises its economic, social and environmental assets ensuring it fulfills its potential as Scotland's foremost city region.

The City Region in 2036

**Contributing to the
Scottish
Government's
Strategic
Objectives:**

Wealthier and Fairer

Smarter

Healthier

Safer and Stronger

Greener

Successful and Sustainable: The largest and most dynamic city region in Scotland for sustainable and inclusive economic growth and one of the UK's fastest growing city regions with a skilled and entrepreneurial workforce.

Low Carbon: Low carbon heat and power, waste management and green networks, contributing to ecologically sustainable economy and lifestyles.

Natural and Resilient: More sustainable and resilient communities and places, better able to meet unforeseen challenges.

Connected: Well connected to UK, European and global markets: digitally, by air, sea and surface transport.

Health and Wellbeing: Enterprising communities that support high levels of personal health and wellbeing and reduce economic and social inequality between people and places.

Collaborative: Working in partnership to deliver outcomes. Using spatial planning as a collaborative tool to stimulate and co-ordinate public and private sector investment in places.

Delivery and Outcomes focus for Planning and Placemaking

**Spatial Land
Use Model:**

Compact City
Region

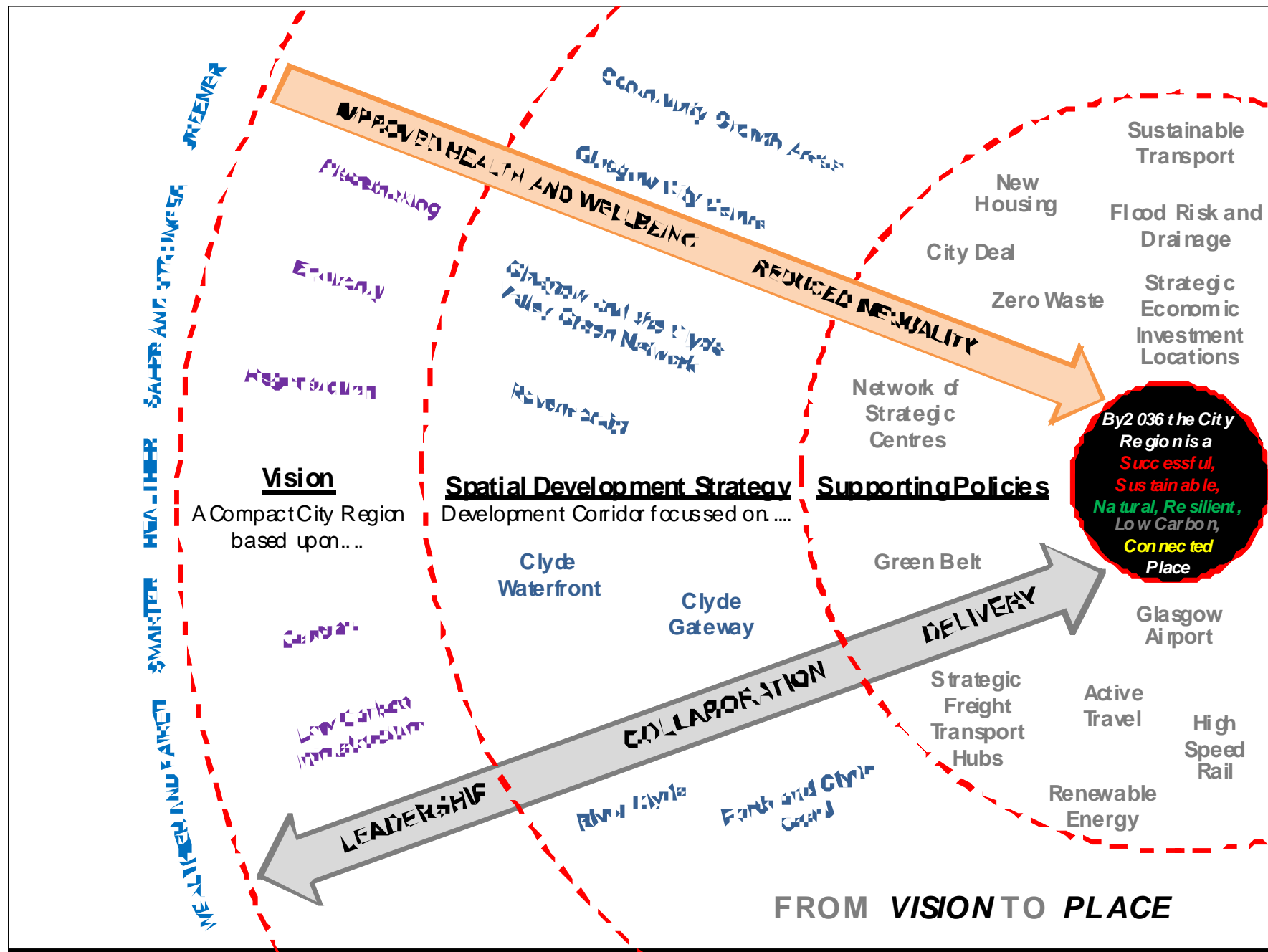
Centres: Glasgow City Centre will be the city region's central connected hub and the employment, retail, civic and cultural core of the city region. It will be accessible from across the city region and further afield particularly by connections to Glasgow International Airport and High Speed Rail connecting to London and other UK regions and centres. Support for other strategic centres to deliver their respective role and function.

Regeneration: Development prioritised to sustainable brownfield locations. Maximising the use of existing infrastructure and assets. Integrate land use with sustainable transport networks. Development prioritised on brownfield land. Minimal extension of the city region's built up area in support of sustainable economic growth. Urban fabric renewed to carbon neutral standards.

Economy: Support for key economic sectors and related Strategic Economic Investment Locations. Investment in freight hubs. Delivery of the Glasgow and Clyde Valley City Deal. Investment in digital infrastructure.

Low Carbon Infrastructure: Heat and power networks, network of waste management infrastructure, transport networks including active travel, green networks and sustainable drainage networks which contribute to a low carbon economy and lifestyles.

Placemaking: Creating places which are distinctive, safe, welcoming, adaptable, resource efficient and easy to move around. Communities reinvigorated by local activity. Places that support individual health and wellbeing and where green infrastructure connects urban and rural areas.



3. Oxford Economics employment structure and projections⁸

This section is a point-in-time economic assessment (2012) of the GCV city region economy with particular attention on population, employment, sectoral structure and productivity. The following elements were examined to identify the implications for the SEILs and their supporting infrastructure and these helped to shape the policy approach identified in Section 5:

1. A comparison of the region against the wider Scottish picture; it will also examine the outlook for the area, and more specifically how the region could potentially recover post-recession.
2. The Local Authority breakdowns within the GCV city region economy
3. Future context for the GCV city region's operating environment
4. Projections for the city region up to 2038
5. Strategic remarks on the GCV city region

Please see Appendix A for the fuller context behind these elements.

3.1 Oxford Economics – Glasgow and the Clyde Valley city region analysis – SWOT analysis

Figure 1 SWOT analysis – Glasgow and the Clyde Valley city region

Strengths	Weaknesses
<ul style="list-style-type: none">■ GVA growth is historically higher than the Scottish average and is forecast to grow by in excess 2% per annum throughout the forecast period.■ The region has higher productivity levels than the Scottish average. Making it an attractive location to invest in.■ The number of business start-ups in the region has increased at an annual rate of 4.3% per annum since 2009.	<ul style="list-style-type: none">■ Total employment has fallen by 86,000 since 2008. These jobs losses are not expected to be recovered within the 25 year forecast.■ The region has an over-reliance upon public services for employment. The public service employment is expected to fall by 2% with a loss of 14,000 jobs over the next decade.■ Slower population growth in the region compared to Scotland and the UK■ High unemployment in some local authorities (Glasgow, Inverclyde, North Lancashire, West Dunbartonshire) relative to Scotland. Longer term labour mobility issues could arise if these levels remain.
Opportunities	Threats
<ul style="list-style-type: none">■ The region has a relatively large admin & support and construction sector. Both are forecast to undergo robust growth.■ Total employment is forecast to grow at a greater rate than total population.■ Affordable housing relative to the UK makes the region attractive to migrants.	<ul style="list-style-type: none">■ The region education sector is smaller relative to Scotland and the UK. Reducing the supply of skilled labour in the future.

⁸ Please see Background Report 1 - www.clydeplan-sdpa.gov.uk/proposedplan2016

Inward migration is expected throughout the forecast period.

- Financial & business services, tourism and creative industries are forecast to be key sectors for growth. The sectors are forecast to create 17,600 additional jobs by 2023.

3.2 Implications of the Oxford economics' analysis

OE Report element	Implications for the SEILs and their supporting infrastructure
City region analysis	<p>2015 has seen a return to growth, with all parts of the private sector in the GCV city region and Scotland participating. In particular the labour market has been stronger than past relationships between output growth and employment would have suggested. Better job prospects and an improved availability of housing finance have given the household sector enough confidence to reduce precautionary saving, so boosting consumption spending. However, there are limits to how far this process can go and sustained growth will require companies to up their spending on investment and an upturn in export sales. There is growing optimism that the return of consumer confidence is spilling over into the corporate sector, while a return to, albeit modest, growth in the Eurozone and a strengthening in world trade should feed through to export growth. This should allow the recovery to build in a way that feeds through to wages and living standards so sustaining growth in the medium term.</p> <p>The issue for the SDP is to identify a range of strategic economic locations with supporting infrastructure to not only support existing businesses but also provide the spatial strategy to encourage new economic development in order to develop the business base in the region and foster the export led recovery identified in Appendix A of this report.</p>
Economies within the city region analysis	The analysis above illustrates the different range of issues and challenges that faces each of the constituent Authorities that

	form the city region. The SDP has to reflect the spatial response to both the Government Economic Strategy and its wider regeneration priorities and by delivering on those, in part through the SEILs, it is envisaged that this will narrow the disparities between the Authorities.
Future context for the city region	The growth sectors identified by OE demonstrate that the existing strengths of some of the SEILs will continue as the creative, financial and business services and tourism sectors are expected to be key areas of growth for the city region in the long term. This builds on the strengths of existing SEILs such as city centre and the International Financial Services District, will continue to be a strong location for business and financial services. For example, the Creative Clyde Enterprise Area (incorporating Hydro/SECC and Pacific Quay) would help to build on the visitor economy opportunities of the city region and other SEILs, such as Queen Elizabeth University Hospital Glasgow, would help support the life science sector.
City region economic scenarios analysis	Both global and UK economic indicators show improvement and this clearly has positive implications for the city region's economy and the ability to tie into these emerging markets and improve the export led trade by indigenous companies will be essential
City region strategic remarks	<p>The following elements will need to be addressed in the SDP:</p> <ul style="list-style-type: none"> ▪ The continued importance of the city centre as the primary SEIL. ▪ The need to focus on the supporting infrastructure - see Section 4 – as this will enable economic growth in the city region ▪ The role of Scottish Enterprise is important in business start-ups and support if the city region is to take advantage of the potential to pursue an export led approach to economic growth. ▪ The new role for town centres which have significantly changed over the years as they adapt to

	<p>changing consumer and technology trends. This will build on the new focus in the SPP and the network of strategic centres identified across the city region – see Background Report 5 Network of Strategic Centres</p> <ul style="list-style-type: none"> ▪ The importance of a mix of housing tenure to retain and attract to sustain economic development will be taken forward through the SDP in the Housing Needs and Demand assessment work – Background Report 4 Glasgow and the Clyde Valley Housing Needs and Demand Assessment (May 2015)
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3.3 Glasgow and Clyde Valley City Deal

The city region also faces numerous challenges that have acted as barriers to economic growth which include high rates of long term unemployment; poor survival rates for business start-ups, stalled development sites in key locations and the need for improved connectivity across the city region.

In response the Clydeplan Local Authorities and the Scottish and UK Governments announced in August 2014 the creation of a Glasgow and Clyde Valley City Deal, which along with employment schemes aimed at reducing unemployment across the city region, has established a £1.13 billion Infrastructure Fund.

The Infrastructure Fund is underpinned by a robust governance process, a rigorous assurance framework and programme management arrangements that are designed to deliver the agreed outcomes.

The Infrastructure Fund will be used over a twenty year period to

- increase economic output by 4.4% per annum;
- create over 28,000 permanent new jobs;
- secure £3.3 billion of private sector investment;
- improve the transport network across the city region;
- unlock key development and regeneration sites including Community Growth Areas; and,
- improve public transport.

The City Deal Infrastructure Fund will support a number of potential projects, aimed at delivering the key strategic priorities. The schedule below is the current list of projects being assessed by the Lead Authorities. The Lead Authorities are working within an agreed assurance framework process in the preparation of the business cases for their respective projects. This process will assist in determining both which projects are taken forward to delivery and the consideration of potential alternative projects.

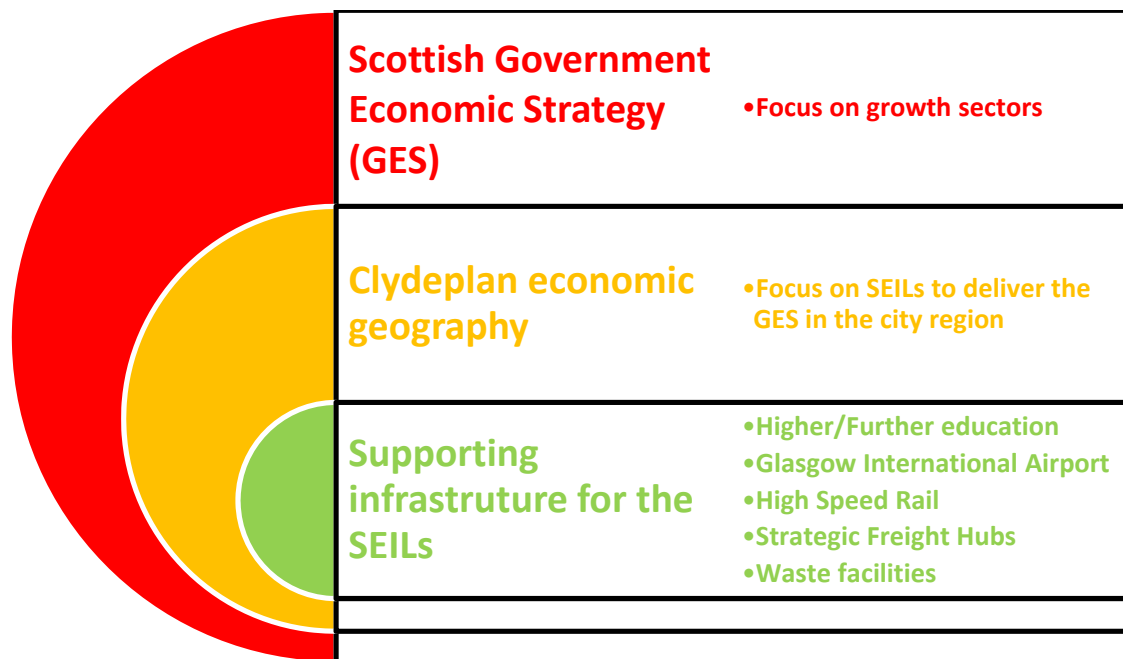
Glasgow and Clyde Valley City Deal Projects (subject to business case assessment)			
	Lead Authority	Project Name	Strategic Priorities
1	East Renfrewshire	M77 Strategic Corridor	Improved strategic connectivity
2	Glasgow	Canal and North Gateway	City Centre improvements
3	Glasgow	City Centre Public Realm Programme	City Centre improvements
4	Glasgow	Clyde Waterfront	Clyde Waterfront
5	Glasgow	Collegelands: Calton/Barras	City Centre improvements
6	Glasgow	Metropolitan Glasgow Strategic Drainage Partnership	Metropolitan Glasgow Strategic Drainage Plan (NPF3 National Development); flood risk and surface water management
7	Inverclyde	Inchgreen	Clyde Waterfront SEIL NFP3 National Renewable Investment Plan (potential site)
8	Inverclyde	Inverkip (former Inverkip Power Station)	Inverclyde Housing Market Area
9	Inverclyde	Greenock Ocean Terminal (including cruise ship port)	Clyde Waterfront Strategic Freight Transport Hub
10	North Lanarkshire	A8/M8 Corridor Access Improvements	Improved strategic connectivity SEIL Strategic Freight Transport Hub
11	North Lanarkshire	Gartcosh/Glenboig Community Growth Area	Community Growth Area Improved strategic connectivity SEIL Strategic Freight Transport Hub
12	North Lanarkshire	Pan Lanarkshire Orbital Transport Corridor	Ravenscraig (NPF3 National Development) Improved strategic connectivity SEIL Motherwell Strategic Centre
13	Renfrewshire	Clyde Waterfront and Renfrew Riverside	SEIL

14	Renfrewshire	Glasgow Airport Investment Zone	SEIL
15	Renfrewshire	Glasgow Airport Access	Improved strategic connectivity
16	South Lanarkshire	Cathkin Relief Road	Improved strategic connectivity SEIL
17	South Lanarkshire	Community Growth Areas (East Kilbride, Newton and Hamilton and Larkhall)	Community Growth Area
18	South Lanarkshire	Greenhills Road/A726 Dual Carriageway	Improved strategic connectivity SEIL
19	South Lanarkshire	Stewartfield Way Transport Capacity Enhancements	Improved strategic connectivity SEIL
20	West Dunbartonshire	Exxon Site Development	Clyde Waterfront
21	Strathclyde Partnership for Transport	Strathclyde Bus Investment Programme	Improved strategic connectivity

4. Overview of the SEILs and their supporting infrastructure

This overview of the SEILs and their supporting infrastructure outlines the range of evidence compiled by Clydeplan and the constituent Authorities to set the policy context for the network of strategic centres. This is set out below.

Figure 2 How the SDP priorities deliver on the Scottish Government Economic Strategy



4.1 Clydeplan Main issues Report (MIR) – January 2015

As part of the MIR⁹ process the Clydeplan constituent Authorities undertook a review¹⁰ of the existing SEILs and their supporting infrastructure. The methodology was as follows:

- Identifying the economic geography of the GCV city region
- Creating SEIL Proformas¹¹
- Re-examining the current and future designation analysis of the SEILs
- Examining whether the SEILs promote the Growth sectors identified in the Oxford Economics report
- Undertaking sectoral specific analysis of the SEILs and the potential to group them around specific clusters or infrastructure
- Identifying Scottish Enterprise views on the SEILs and supporting infrastructure

⁹ http://www.clydeplan-sdpa.gov.uk/files/Main_Issues_Report_January_2015.pdf

¹⁰ <http://www.clydeplan-sdpa.gov.uk/sdp/main-issues-report-january-2015>

¹¹ See Appendix D

- Identifying Scottish Property Federation and the Royal Institute of Chartered Surveyors (RICS) views on the SEILs and supporting infrastructure
- Identifying Freight Transport Association's and Clydeports views on the SEILs and supporting infrastructure
- Identifying Visit Scotland's views on the visitor economy and the SEILs
- Identifying Sports Scotland's view on the SEILs and supporting infrastructure
- Identifying Scottish Environmental Protection Agency's (SEPA's) views on the SEILs and waste management facilities
- Identifying Transport Scotland and Strathclyde Partnership for Transport views on transport connectivity and the SEILs, including Glasgow international airport
- Re-examining the role of further and higher education in supporting the SEILs
- Re-examining the complementary role of the network of strategic centres and the SEILs
- Identifying the potential implications of the City Deal project

Recommendation's from the MIR process

Taking into consideration the above elements of the review, it was felt that the existing network of SEILs should be augmented by the addition of the following new SEIL locations:

- Biocity Scotland - to support the Life Sciences sector
- Creative Clyde (including the Hydro/SECC) in relation to the creative and tourism sectors;
- Glasgow South Hospital in relation to the life sciences sector and the continuing support of the wider further and higher education establishments in the city region and;

The inclusion of additional strategic freight hubs including:

- Burnbrae, Linwood (road/rail)
- King George Fifth Dock (sea)

4.2 Strategic Economic Investment Locations and supporting infrastructure – Context

The following section sets out the key headlines of the analysis across the network of SEILs and supporting infrastructure. Please see Appendix B, C and D for the full detailed analysis that underpins these headlines.

4.2.1 Monitoring of marketable land in the SEILs

The SDP seeks to ensure that the quantity, quality and distribution of the available industrial and business land continues to meet the level of demand for all types of industrial and business proposals that may emerge in the SEILs

This supply side analysis provides analysis at both Local Authority wide and SEIL specific

The key findings¹² for the SEILs were as follows:

- The SEILs themselves represent 56.64% of the total marketable land in the city region.
- The take up in the SEILs in 2013/14 is 28.03ha. This represents 53.92%% of the total take up in 2013/14 in the city region.

These figures reflect the importance of the SEILs to delivering both the Spatial Development Strategy and the Scottish Government Economic Strategy in the city region.

Please see Appendix B for an overview of the specific SEIL and Local Authority wide analysis and the criteria adopted for the monitoring of the industry and business land

4.2.2 The economic geography of the city region

The city region's economic performance is important to the economic potential of Scotland a whole (see Section 3 and Appendix A). The role of the SDP is to better understand the current and future economic geography requirements that will help to deliver on the GES and other related strategies.

Currently through the agreed network of SEILs the city region has a geography that is formed around clusters that include:

- National and regional development priorities
- Specific locations
- Key pieces of supporting infrastructure
- Specific economic sectors

Clearly each of these components overlap and together form a coherent whole as a city region but it is important to understand how the region functions and its economic connections.

National and regional development priorities

To the north west of the city region, the Inverclyde Waterfront (Inchgreen site) is identified as a further potential site in the National Renewables Infrastructure Plan (NRIP). This site has potential for the manufacturing of renewable technologies. Within the Inverclyde Waterfront there is also potential to enhance the facilities at Ocean Terminal to take better advantage of the tourism opportunities from cruise liners and promote linkages between the terminal, the city centre and beyond. On the opposite side of the city region is Ravenscraig (National Development). This is the site of a former steel works and represents a sizeable economic opportunity of the city region given the scale of the site and it's potential. The development has in place a master plan that looks to take forward the proposal over the coming years.

Specific locations

¹² These relate to 2013/14 time period unless stated otherwise

Glasgow City Centre is the core of the city-region and its principal economic and cultural global asset. Sitting between the strategic developments priorities of the Clyde Waterfront and Clyde Gateway, the City Centre is Scotland's primary metropolitan centre and the city-region's economic core with its employment concentrations, journey-to-work catchment and economic development quarters including, Pacific Quay, International Financial Services District, City Science, International Technology and Renewable Energy Zone and Creative Clyde Enterprise Zone.

It also offers a strong tourism role and its UK level visitor destination, in particular, its conference and business tourism offer based around the SECC and the Hydro Arena on the banks of the Clyde. It provides a range of cultural and artistic roles, as its home to Scottish music and dance companies and other key cultural facilities. It provides a significant UK retail offer, second only to London. Finally, given its centrality and accessibility as a public transport hub, it has the UK's second most extensive suburban rail network with radial networks and future High Speed Rail terminus. So it provides excellent levels of connectivity within and to the city region from national and international destinations.

Key pieces of infrastructure

There are two main pieces of economic infrastructure that act as clusters for economic activity at the city region level. The first is Glasgow international Airport. This has developed over the years and is now a significant contributor to the city region's economy. This is further enhanced by the airports role as an international freight hub. The Airport development zone is subject to a master planning exercise, involving a range of partners, in order to deliver on the locations potential.

The second is the extensive motorway network, especially the M8 and M74. This has facilitated the development of a number of logistics and distribution development at both Eurocentral and Poniel.

Specific economic sectors

The city region is currently strong in a number of specific sectors as well as having the potential to exploit opportunities in others. Clearly there is a strong correlation between the city centre and its surrounding areas and the financial services sector.

In the life sciences sector there is established activity at the Bio City development in North Lanarkshire and the West of Scotland Science Park. There is potential commercial spin offs from the Glasgow South Hospital development currently underway and there are linkages between the city region and the other Life Sciences clusters in Irvine, North Ayrshire. The recent development at Queen Elizabeth University Hospital houses a teaching and learning centre, and also research facilities which allow collaboration between academic, industrial and NHS sectors, particularly in the life sciences field, and the research and education sector.

It is important to state that each of the SEILs individually contribute to the city region as each support the GES and offer a location for existing and future business to develop. For example, there are a number of SEILs which are well established economic locations, including Scottish Enterprise Technology Park and Hillington/Renfrew North

which provide successful and marketable locations for a range of economic activity. The SDP also has to identify locations where there is the potential for change to occur and economic opportunities to take place. These locations include Clydebank Riverside, Clyde Gateway, Ravenscraig and Bishopton and some of these locations are also tied into wider national regeneration priorities.

Sectoral specific analysis the SEILs and the potential grouping of them around specific clusters or specific infrastructure

There is a strong correlation between some specific economic sectors, roles and locations across the city region. These include:

- National Renewables Infrastructure Plan locations and national development priorities at Inverclyde Waterfront and Ravenscraig
- Financial services, leisure, visitor economy, life sciences, higher and further education, creative industries and overall employment concentrations in Glasgow City Centre cluster
- Logistics and distribution at Glasgow International Airport, Eurocentral and Poniel.
- Life sciences sector Bio City, West of Scotland Science Park and Queen Elizabeth University Hospital Glasgow
- Creative industries at Pacific Quay and Creative Clyde
- Energy and renewables at City Science (ITREZ)
- General economic activity - Scottish Enterprise Technology Park, Hillington/Renfrew north, Clydebank Riverside, Clyde Gateway, Glasgow International Airport, Lomondgate and Bishopton.

4.2.3 transport connectivity and the SEILs, including Glasgow international airport

Clydeplan has also been involved in discussions with Transport Scotland Strathclyde Partnership for Transport and Glasgow Airport Ltd. The outcomes of these discussions were as follows:

- Significant investment has been made in the city regions transport infrastructure since SDP1 in support of the Scottish Government Strategic Transport Projects review and related Infrastructure Investment Plan 2011 in particular Project 24 West of Scotland Strategic Rail Enhancements and Project 26 Rail Enhancements between Inverclyde / Ayrshire and Glasgow and Strathclyde Partnerships for Transport's Regional Transport Strategy and related Delivery Plan.
- In addition the Glasgow and Clyde Valley City Deal proposes a number of transport related schemes which will improve strategic connectivity and support the SDP's strategic priorities including the Glasgow International Airport link, a Bus Investment Programme and improved transport infrastructure in support of several Community Growth Areas.

It was felt that given the level of recent and projected investment in both the strategic road and public transport networks the role of the SDP would be to identify any gaps/projects which should be prioritised for investment in support of the SDP.

Clydeplan is serviced to a greater or lesser extent by three airports, Glasgow, Edinburgh and Prestwick. Edinburgh and Prestwick lay outwith the boundaries of the SDP and decisions on their long term development lie with other organisations.

NPF3 recognises Glasgow Airport as a key component of Scotland's and the city-region's economic infrastructure. It is the city-region's primary linkage with its national and international business and visitor economy markets, with both sectors being important to the city region's long term future economic competitiveness. Strategic airport enhancements will be required to support the gateway and hub functions of the airport which will be secured through the airport's masterplan and related economic activity delivered by the SEILs located around the airport.

To support these enhancements accessibility by both road and public transport requires to be addressed in the context of the airports masterplan and surface access strategy in order to:

- increase the modal share of public and active transport modes for passengers and employees to and from the airport;
- improve journey times to and from the airport for public and active transport modes such that they are increasingly competitive with the private car; and,
- improve journey time reliability to and from the airport via the M8.

4.2.4 The role of further and higher education in supporting the SEILs

The SDP identifies the importance of both the further and higher to the city region and its long term competitiveness of the city region. The Higher Education Institutions (HEIs) themselves alone exert a number of different impacts on the city regions regional economy¹³.

- Expenditure impacts, that capture the impact of HEIs as businesses (i.e. purchase of inputs from other Scottish firms, employing people who consume Scottish goods plus expenditure impacts of HEIs' students)
- Supply-side impacts that HEIs exert through their outputs:
 - Graduate impact on labour productivity of the host region
 - production/exchange of knowledge improves total factor productivity
 - wider non-market impacts (e.g. social and non-market private benefits of higher education)

4.2.5 The complementary role of the network of strategic centres and the SEILs¹⁴

The SDP identifies a network of 23 strategic centres' and that Glasgow City centre sits at the apex of the network given its importance at a city region level, strategic economic significance and diverse range of core functions. Because of that the city centre is required to be safeguarded by all the relevant authorities. The remaining centres sit

¹³ <http://www.glasgoweconomicfacts.com/GetFile.aspx?itemid=133>

¹⁴ Please see Background Report 5 - www.clydeplan-sdpa.gov.uk/proposedplan2016

below the city centre in terms of the hierarchy. The plan notes that the remaining strategic centres required to be protected and enhanced to meet their differing challenges and that the relevant role, functions and actions should be taken forward through the respective Local Development Plans

SPP identifies a town centre first principle which promotes an approach to wider decision-making that considers the health and vibrancy of town centres. It states that planning for town centres should be flexible and proactive, enabling a wide range of uses which bring people into town centres. The planning system should:

- apply a town centre first policy when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities;
- encourage a mix of uses in town centres to support their vibrancy, vitality and viability throughout the day and into the evening;
- ensure development plans, decision-making and monitoring support successful town centres; and
- consider opportunities for promoting residential use within town centres where this fits with local need and demand

This focus on town centre first and the need to encourage uses which generate footfall will have implications for a range of activities, including economic, being encouraged into town centres. So this will have implications for office, education, tourism and culture orientated economic facilities. The intention is to direct development to assist in the regeneration of the City and Town Centres listed but also as they represent good sustainable locations for access by public transport. These opportunities would be identified by the respective town centre strategy.

It is felt that both approaches to promoting economic development are compatible given the scale and type of economic uses being promoted in the Strategic Centres will be different to those being promoted by the SELs.

4.3 Issues arising from the MIR process

Following the MIR stage and the representations received from interested parties the following issues were identified and are reflected in the SDP.

Issue	Respondent	Outcome
Given their importance to the visitor economy, the identification of both: <ul style="list-style-type: none"> ▪ Forth and Clyde Canal and the ▪ River Clyde 	Visit Scotland	Agreed that both should be specifically recognised in the SDP's Spatial Development Strategy to reflect their importance to the city region.
Rosethay Dock to be included as a Strategic Freight Transport Hub in the SDP	Peel Port	In discussions with the relevant Local Authority, West Dunbartonshire, it was felt that the designation as a strategic freight hub may restrict the potential uses that could take place there and that there was

		a requirement for a degree of flexibility of uses which would support the wider objective of the Queens Quay development priority, as identified in the West Dunbartonshire Council Local Development Plan, whilst recognising that this is an important location for freight movement.
<p>The publication of the Scottish Government's programme for Government¹⁵ the following elements were identified</p> <ul style="list-style-type: none"> ▪ The Government will work with partners to establish a fifth Enterprise Area site at BioCity in North Lanarkshire ▪ Support regional economic development through Regional Partnership Plans supported by new investment of £200,000. 	This was a separate Scottish Government announcement post MIR	The identification of Biocity as Proposed Enterprise Area aligns with the SDP's intention to identify BioCity as a SEIL in the SDP. At this time, the details surrounding the establishment and scope of Regional Partnership Plans are not fully developed so the SDP cannot fully reflect this change at this juncture. This issue will be monitored by the SDP and appropriate actions will be taken.
The removal of the existing status of both 'safeguarded' and 'opportunity' for the SEILs.	Scottish Enterprise, Local Authorities, commercial partners	Agreed. The removal of the existing status of both 'safeguarded' and 'opportunity' for the SEILs. It was felt that these statuses were both confusing and potentially misleading to investors when it came to the promotion these sites as the key economic locations for the city region and reflected the aspirational nature of the Scottish Governments economic strategy and the need for the GCV city region to promote economic development. The SDP will reflect this change and the strengthened policy approach taken would support the protection and promotion of the locations for their specified uses.
The identification of Creative Clyde Creative Clyde	Scottish Enterprise	Agreed. The SDP identifies a new SEIL called 'Creative

¹⁵ <http://www.gov.scot/Resource/0048/00484439.pdf>

Enterprise Area (incorporating Hydro/SECC) as a SEIL and the subsequent incorporation of the existing Pacific Quay SEIL. The MIR proposed that the Creative Clyde Enterprise Area became a SEIL in the Proposed Plan in order to meet SPP requirements. There is an overlap between the existing Pacific Quay SEIL designation and the Creative Clyde Enterprise Zone ¹⁶ which clearly states that Pacific Quay is a 'neighbourhood' within the wider Creative Clyde Enterprise Area. So this had implications for the existing SEIL designation at Pacific Quay.		Clyde Enterprise Area (incorporating Hydro/SECC and Pacific Quay)' which incorporated the existing 'Pacific Quay' SEIL.
<p>City Deal – As a direct response to this in August 2014 the Clydeplan local authorities and the Scottish and UK Governments announced the creation of a Glasgow and Clyde Valley City Deal which along with employment schemes aimed at reducing unemployment across the city region established a £1.13 billion Infrastructure Fund. This Fund will be used over a 20 year period to:</p> <ul style="list-style-type: none"> ▪ increase economic output by 4.4% per annum; ▪ create over 28,000 permanent new jobs; ▪ secure £3.3billion of private sector investment; ▪ improve the transport network across Glasgow and the Clyde Valley; ▪ unlock key development and regeneration sites including Community Growth Areas; 	Local Authorities	Agreed. The SDP should reflect this project and how it supports the agreed Spatial Development Strategy

¹⁶ <http://www.creativeclyde.com/news--events/news/pacific-quay-masterplan>

<ul style="list-style-type: none"> improve public transport. <p>The City Deal Infrastructure Fund will support a number of projects aimed at delivering the key strategic priorities. The Clydeplan local authorities are currently assessing the detailed delivery programme for each of the projects</p>		
Glasgow South Hospital renamed Queen Elizabeth University Hospital Glasgow.	NHS Scotland	Agreed. This change should be reflected in the SDP and this is the name that will be used in relation to the identified SEIL at this location.
The spatial development strategy identifies three business clusters, which allow the SDP to align with other existing economic strategies and provide consistency in how these locations are promoted across a range of strategies. See section 4.2.2 for further details.	Scottish Enterprise, Constituent Authorities	Agreed. This change should be reflected in the SDP

5. Clydeplan Strategic Economic Investment Locations and Strategic Freight Transport Hubs

5.1 Strategic Economic Investment Locations

The Spatial Development Strategy identifies 22 Strategic Economic Investment Locations (SEILs) which will support the long term vision of a rebalanced low carbon economy, boosting competitiveness and tackling inequality. The SEILs have been selected because they are the priority locations to promote the Scottish Government's key economic sectors and Scottish Enterprise's locational priorities, and are in sustainable locations. The Schedule below identifies each SEIL's dominant role and function, the opportunities for growth and challenges which need to be addressed.

Access to wider UK, European and global markets is essential to support the city-region's economy and development of the SEILs. The city region's competitive position is significantly dependent on its ability to access economic markets efficiently and effectively. Continuing investment, including City Deal, in the city region's infrastructure including High Speed Rail, Glasgow International Airport, road, rail, active travel access and digital connectivity will be important in securing its competitive position.

The Glasgow and Clyde Valley City Deal includes a series of infrastructure projects which will make a significant contribution to the future development of the SEILs and their supporting infrastructure. The links between the City Deal and SEILs are identified in the Schedule.

Given its scale and importance to the city region, Glasgow City Centre is the primary SEIL in the network in relation to its dominant roles and functions. Its location and surrounding areas support employment districts, University campuses, related research and development, cultural quarters, and emerging renewable technology focus. Its inherent accessibility by sustainable transport and its mix of economic activity and employment results in an ability to meet a wide range of economic roles and functions and be the centre for the new low carbon sustainable economy.

The Spatial Development Strategy identifies three business clusters, which allow the SDP to align with other existing economic strategies and provide consistency in how these locations are promoted across a range of strategies.

- **Glasgow City Centre cluster** comprising, Glasgow city centre, International Financial Service District, International Technology and Renewable Energy Zone and Creative Clyde Enterprise Area (incorporating Hydro/SECC and Pacific Quay);
- **Bio Corridor cluster** comprising Biocity Scotland (proposed Enterprise Area), West of Scotland Science Park and Queen Elizabeth University Hospital Glasgow;
- **Glasgow Airport Investment Area.**

The Spatial Development Strategy's focus on key strategic locations does not preclude additional business and industrial sites from being promoted and developed through LDPs, in response to local need.

Policy - Strategic Economic Investment Locations

The Strategic Economic Investment Locations (SEILs) set out in Schedule and Diagram are the city-region's strategic response to delivering long-term sustainable economic growth.

To support the Vision and Spatial Development Strategy Local Authorities should

- safeguard and promote investment in the SEILs to support their dominant role and function and to address the opportunities/ challenges as identified in Schedule . This may include providing opportunities for their expansion or consolidation of these locations, where appropriate;
- identify the locations and circumstances when other uses commensurate to the scale of the SEILs non-dominant role and function will be supported. The Implementing the Plan and Development Management section of the Plan should be taken into account when considering non dominant role/function uses within the SEILs.

Schedule Strategic Economic Investment Locations		
Strategic Economic Investment Location	Key Sectors (dominant role and function)	Opportunities/ Challenges
Glasgow City Centre cluster comprising		
Glasgow City Centre	Business and financial services; green technologies; higher and further education; visitor economy	<p>The proposed City Development Plan identifies the preparation of a City Centre Strategic Development Framework (SDF) is a priority. The SDF will encapsulate the spatial elements of the City Centre Strategy. The City Centre Strategy seeks to improve accessibility within the City Centre, and improve connectivity between the Principal Office Area, the Learning Quarter, and other City Centre 'Districts. City Deal investment will support the City Centre Strategy by delivering public realm, smart infrastructure, and sustainable transport projects. The University campus plans, Edinburgh Glasgow Improvement Programme (EGIP), which includes improvements to Queen Street Station, and the extension to Buchanan Galleries will all bring significant improvements to the City Centre</p> <p>(Note that both the International Technology and Renewable Energy Zone (ITREZ) and International Financial Service District (IFSD) SEILs sit within the specific City Centre SEIL boundary)</p>
Creative Clyde Enterprise Area (incorporating Hydro/SECC and Pacific Quay)	Creative and digital industries; visitor economy	<p>This location provides development opportunities on both banks of the River Clyde. On the south bank, its Enterprise Zone status provides incentives to encourage further development for businesses operating within the creative and digital industries, as will the improved accessibility provided by Fastlink. City Deal investment will provide improvements in pedestrian/cycle accessibility. The Scottish Enterprise masterplan seeks a range of complementary uses such as retail, leisure, and residential, in order to create a night-time economy. Visitor economy activity is focused on the Science Centre.</p> <p>On the north bank, the SECC/SSE Hydro is an established high quality location which focuses on visitor economy, including business tourism.</p>
International Financial Service District (IFSD)	Business and Financial services	<p>City Deal investment will support accessibility and public realm, and sustainable transport infrastructure. The City Centre Strategy encourages new build and refurbishment developments which will provide residential, hotel, leisure, and supporting uses in order to promote a night-time economy in the initial IFSD (Broomielaw) area.</p> <p>IFSD, aimed at expanding the financial services sector, has now developed into a City Centre wide brand and is no longer spatially linked to the area around Broomielaw.</p>
International Technology and Renewable Energy Zone (ITREZ)	Green/Renewable Technologies	Development opportunities remain, and the SEIL could benefit from the University of Strathclyde's campus masterplan, the City Centre Strategy's Learning Quarter and other projects. In addition, City Deal investment will improve physical connectivity with other parts of the City Centre.
Bio Corridor cluster comprising		
Biocity Scotland Proposed Enterprise Area	Life Sciences	<p>Recent designation as an "Enterprise Area" by Scottish Government as a key location for life science based businesses.</p> <p>The creation of MediCity as an additional focus will further enhance the Glasgow BioCorridor and</p>

		Scottish Life Science Network bringing together academic institutions, the NHS as well as commercial operators.
Queen Elizabeth University Hospital Glasgow	Life sciences (research and development)	Opportunities through the teaching and learning centre and supporting research facilities will allow collaboration between academic, industrial and NHS sectors. Its accessibility with the Creative Clyde SEIL and the City Centre has been improved by Fastlink, and City Deal investment will create a new pedestrian/cycle route between the Hospital Campus, Govan, Pacific Quay and the City Centre, thus improving sustainable transport links between these key locations. Continued investment in research, education and innovation is encouraged, particularly for life sciences. Improved public transport links to wider hospital catchment.
West of Scotland Science Park	Life Sciences / Green Technologies	This is an established high quality business park for businesses operating in emerging technologies, including life sciences. Development opportunities remain within the park.
Glasgow Airport Investment Area		
Glasgow Airport Investment Area (GAIA)	Distribution and Logistics/ Manufacturing/ Engineering/ Green Technologies/ Life Sciences/ Research and Development/ Airport related use	City Deal investment to improve surface access to Glasgow Airport increasing connectivity to international, national and regional markets. Improving connectivity within the wider SEIL will facilitate the redevelopment and regeneration of key development sites to support growth at this location. This location is also a Strategic Freight Transport Hub which supports the operation of the wider SEIL.
Bishopton	Distribution and Logistics, Manufacturing/Engineering	Redevelopment of previously used land within Community Growth Area. Private sector investment providing fully serviced site as part of wider masterplan. M8 junction improvements/access provision required to facilitate development.
Clyde Gateway	Business and Financial Services / Distribution and Logistics	Within Glasgow, the area is promoted for Use Classes 4, 5 and 6, but other uses such as residential, and hotel will also be appropriate, in line with the approved Masterplan. There has been site acquisition and clearance in order to create development sites. The new 'Smart Bridge' with the National Business District is completed, thereby increasing accessibility across the River Clyde. Surface water management and infrastructure provision is an issue within the southern part of the Glasgow section of the SEIL. Within South Lanarkshire the Shawfield site Phase 1, part of the National Business District, is remediated, serviced and new pedestrian walkways and bridge completed. Consent granted for class 4 and ancillary uses and site currently being marketed. Further development land in Shawfield will be brought forward in future phases, remediation and servicing will require to be undertaken. The area provides an opportunity to bring 10,000 jobs to the location.. A new office and commercial district has been created on a previously derelict 5Ha site bounded by Farmeloan Road and Cambuslang Road in Rutherglen. The site has the potential to bring 1,000 jobs to the area
Clydebank Riverside	Business and Financial Services/Life Sciences	Opportunities for further development exist adjacent to recent business development at Queens Quay and Clyde Gate, which could link to existing and planned health (Golden Jubilee Hospital and proposed care home and health centre), leisure (proposed WDC leisure centre) and educational (Clydebank College) uses. West Dunbartonshire Council has committed £16m towards advance infrastructure to realise a 1,000 house development on Queens Quay.
Eurocentral	Distribution and Logistics	Eurocentral Scotland has been masterplanned to offer a range of serviced plots to accommodate production and distribution businesses and significant development opportunities remain. Large scale

		<p>speculative development has also provided major floorspace with significant accommodation available to the market for business and distribution activities.</p> <p>Additional opportunities at Newhouse Industrial Estate and Mossend Railhead further augment the attractiveness of the SEIL for future development. Enhanced access to the SEIL will be secured through the M8/ M73/ M74 Motorway Improvement Project. City Deal funding offers further opportunities to enhance connectivity to Eurocentral from surrounding communities.</p> <p>This location is also a Strategic Freight Transport Hub which supports the operation of the wider SEIL.</p>
Gartcosh	Business and Financial Services	<p>Significant development potential remains at Gartcosh where three large scale development areas offer a range of options for business users. The location has direct access to the motorway network (M73), a passenger rail station on site, and is in close proximity to the Gartcosh - Glenboig Community Growth Area.</p> <p>Significant opportunities also exist to augment the established Scottish Crime Campus.</p> <p>To help stimulate investment, Fusion Assets are promoting part of the site as the Gartcosh Industrial Park, where advance infrastructure works are ongoing on the first phase of a development. City Deal investment is also being investigated to improve access to the site.</p>
Hamilton International Technology Park	Business and Financial Services / Life Sciences / Creative and Digital Industries	This is an established high quality business park and the key challenge is to retain this character through maintaining the environmental quality and preventing inappropriate changes of use.
Hillington / Renfrew North	Distribution and Logistics, Manufacturing/Engineering, Business Services	<p>Innovative development mechanism (Simplified Planning Zone) in place to encourage growth and diversify uses in this successful sustainable business park location. A need to continue to evolve and adapt to changing market demands and facilitate the development of key sites.</p> <p>This location is also a Strategic Freight Transport Hub which supports the operation of the wider SEIL.</p>
Inverclyde Waterfront	Green Technologies / Business and Financial Services	The National Renewables Infrastructure Plan (NRIP) identifies Inchgreen as a phase 2 site (i.e. further potential site) for distributed manufacturing / operations and maintenance of offshore wind infrastructure. City Deal investment will support the development of this site for renewable and specialist marine services by enabling remediation works and access improvements. There are potential opportunities for public sector funding to progress several sites, i.e. through Riverside Inverclyde (URC). A flexible planning policy approach provides the scope to meet changing market demands, where appropriate.
Lomondgate	Business and Financial Services/Creative and Digital Industries/Tourism	Planning permission for a business park adjacent to existing international businesses and established roadside services on the A82 strategic route. Further opportunities exist within the Vale of Leven Industrial Estate within a wooded setting. Existing properties within the Vale of Leven Industrial Estate would benefit from improvements. Green Network enhancement projects have been identified.
Peel Park North	Life Sciences/Creative and Digital Industries	This is an established high quality business park and the key challenge is to retain this character through maintaining the environmental quality and preventing inappropriate changes of use. City Deal investment in East Kilbride road schemes will increase the accessibility of this location.
Poniel	Distribution and Logistics	Part of the site has been developed for a whisky blending and storage facility. The consent on the remainder of the site has recently been extended by three years. A change of ownership and the economic downturn have delayed progress on the development of the site.

Ravenscraig	Business and Financial Services / Construction / Manufacturing / Engineering /Further and Higher Education	<p>Designation as a National Development within NPF3 reflects the importance given to the regeneration of Ravenscraig to create a sustainable settlement and there is considerable potential to accommodate a range of business and educational opportunities across the site including the continuation of manufacturing and engineering and further and higher education related activities at the New College Lanarkshire Campus.</p> <p>The masterplan for the site is currently under review by Ravenscraig Ltd to reflect current market conditions and opportunities are being examined to consider the scope for utilizing Tax Incremental Financing (TIF) to unlock future opportunities on site.</p>
Robroyston	Business and Financial services	Business pavilions have been developed to provide the Novo Business Park, and the wider area within the site has been prepared for development, offering a range of development opportunities.
Scottish Enterprise Technology Park (SETP)	Life Sciences / Creative and Digital Industries / Green Technologies (Research and Development)	<p>This is an established specialised business park and the key challenge is to retain this character through maintaining the environmental quality and preventing inappropriate changes of use.</p> <p>Ongoing restructuring within the estate has created a number of small scale brownfield sites available for development. City Deal investment in East Kilbride road schemes will increase the accessibility of this location.</p>

Strategic Economic Investment Locations 2016

Glasgow City Centre Cluster

- 1, City Centre
- 2, Creative Clyde Enterprise Area (incorporating Hydro/SECC and Pacific Quay)
- 3, International Financial Services District
- 4, International Technology and Renewable Energy Zone

Bio Corridor Cluster

- 5, BioCity Scotland Proposed Enterprise Area
- 6, Queen Elizabeth University Hospital Glasgow
- 7, West of Scotland Science Park

Glasgow Airport Investment Area Cluster

- 8, Glasgow Airport Investment Area comprising Inchinnan, Netherton Farm and Westway

- 9, Robroyston
- 10, Clyde Gateway
- 11, Inverclyde Waterfront
- 12, Gartcosh
- 13, Eurocentral
- 14, Ravenscraig
- 15, Bishopston
- 16, Hillington / Renfrew North
- 17, Scottish Enterprise Technology Park
- 18, Hamilton International Technology Park
- 19, Poniel
- 20, Peel Park North
- 21, Clydebank Riverside
- 22, Lomond Gate

Freight Hubs 2016

- 1, Eurocentral/ Mossend
- 2, Gartsherrie
- 3, Deanside
- 4, Glasgow International Airport
- 5, Greenock Ocean Terminal
- 6, Burnbrae
- 7, King George V Dock
- Underground Stations
- Rail Stations
- Motorways
- SDP Boundary

5.2 Strategic Freight Transport Hubs

The sustainable transportation of goods and raw materials is essential to the long term growth of a low carbon economy in the city region. In order to achieve this, it is appropriate to promote a modal shift from road to rail and sea.

The Spatial Development Strategy supports this modal shift by safeguarding and promoting investment in seven Strategic Freight Transport Hubs (SFTTHs) as identified in Schedule below.

The schedule also sets out the opportunities for future growth and any challenges which need to be addressed.

The SFTTHs have been selected because they maximise access to ports, rail networks and airports, with Eurocentral/Mossend, Gartsherrie, Deanside and Burnbrae facilitating the transfer of freight from road to rail, while Greenock Ocean Terminal and King George V Dock supports road to sea transfers and Glasgow International Airport allows road to air transfers.

The SFTTHs, when viewed collectively, link all the key transport modes/networks and provide opportunities for freight to be transported by each mode. The SFTTHs are also capable of accommodating the general trend within freight movements towards larger ships and containers.

Policy - Strategic Freight Transport Hubs

The Strategic Freight Transport Hubs set out in Schedule and Diagram comprise the strategic response to long-term sustainable freight movements into and within the city-region.

To support the Vision and Spatial Development Strategy Local Authorities should

- safeguard and promote investment in the Strategic Freight Transport Hubs to support the agreed freight mode and, where appropriate, associated passenger facilities;
- ensure that ancillary land allocations adjacent to freight facilities, where appropriate, are safeguarded solely for the purposes of freight activity. For example, storage, trans-shipment, break-bulk infrastructure and related services.

Strategic Freight Transport Hubs	Mode	Opportunities/ Challenges
Burnbrae Linwood, Renfrewshire	Road//Rail	Sustainable established freight hub in close proximity to various transport modes. Future growth would require the innovative use of existing available land.
Deanside Hillington, Renfrewshire	Rail	Adopted innovative development mechanism can facilitate future growth and enhancement of this freight hub in support of the wider SEIL. Significant expansion of the freight hub would require a comprehensive approach to development.
Eurocentral/Mossend Mossend, North Lanarkshire	Rail / Road	Enhanced access by road to the Freight Hub will be secured following completion of the M8 M73 M74 Motorway Improvement Project. Major opportunity to further encourage the modal shift to rail likely through the planned expansion of the Mossend Railhead, including the development of a new Mossend International Rail Freightpark.
Gartsherrie Coatbridge, North Lanarkshire	Rail / Road	Established freight hub with limited future expansion opportunities. Poor accessibility to wider roads network. City Deal investment offers potential to improve road access to the site.
Glasgow International Airport Paisley, Renfrewshire	Air	City Deal investment offers potential to expand freight hub in support of the Glasgow city region economy. Requirement to improve existing access to wider transport network.
King George V Dock Govan, Glasgow	Sea	Improve existing access to wider transport network.
Greenock Ocean Terminal Greenock, Inverclyde	Sea	City Deal investment will provide the opportunity to improve access, extend the quayside and deliver a dedicated cruise liner terminal. While focused on enhancing cruise liner activity, this project will also release quayside capacity for freight transport activity.

6. Consultation and Review

Clydeplan have an agreed Development Plan scheme¹⁷. The purpose of the Development Plan Scheme is to:

- outline the steps which Clydeplan will take in preparing the SDP for Glasgow and the Clyde Valley; and
- explain the statutory processes involved in preparing the Plan and how you can be involved in terms of accessing documents and making representations

The key remaining stages are as follows:

Strategic Development Plan stages	Key Components	Estimated Timetable
Publication of Proposed Plan, and Supplementary Environmental Report	Publication and consultation on Proposed Plan and related supporting documents including the Action Programme.	January 2016
Proposed Plan Submission	Submission of Proposed Plan to Scottish Ministers for approval.	May 2016
Examination of Proposed Plan	Any unresolved representations will be subject to an Examination conducted by an independent Reporter appointed by Scottish Ministers.	June 2016
Modification of Proposed Plan	Scottish Ministers may amend the Plan in light of the Reporters recommendations. They will publish any modifications along with their reasons for making them.	Late 2016/Early 2017
Approval and Publication of the Plan, Environmental Report and Action Programme	Once Scottish Ministers receive the Examination Report, they may approve the Plan in whole or in part (with or without modification), or reject the plan. Clydeplan will then	Spring 2017

¹⁷ http://www.clydeplansdpa.gov.uk/files/Development_Plan_Scheme_and_Participations_Statement_2015_16%281%29.pdf

	publish the approved SDP as soon as possible after approval. The Action Programme in support of the SDP requires to be adopted and published within three months of the SDP being approved by Scottish Ministers.	
Strategic Environmental Assessment Post Adoption Statement	This details how environmental considerations have been integrated into the SDP.	Spring 2017

Appendix A City region economic context

Oxford Economics – Glasgow and the Clyde Valley city region analysis¹⁸

Table 2 below summarises the contributions of the Glasgow and the Clyde Valley city region economy in terms of population, employment and GVA showing that it accounts for around a third of the Scottish economy whilst only encompassing 4% of the region's landmass.

Table 2: Relative importance of the Glasgow and the Clyde Valley city region, 2012

	2012	% of Scotland
Total Population (000s)	1789	34%
Total Employed (000s)	868	33%
GVA (£m, 2010 prices)	36895	34%
Land	3383 km ²	4%

Source: Nomis, ONS

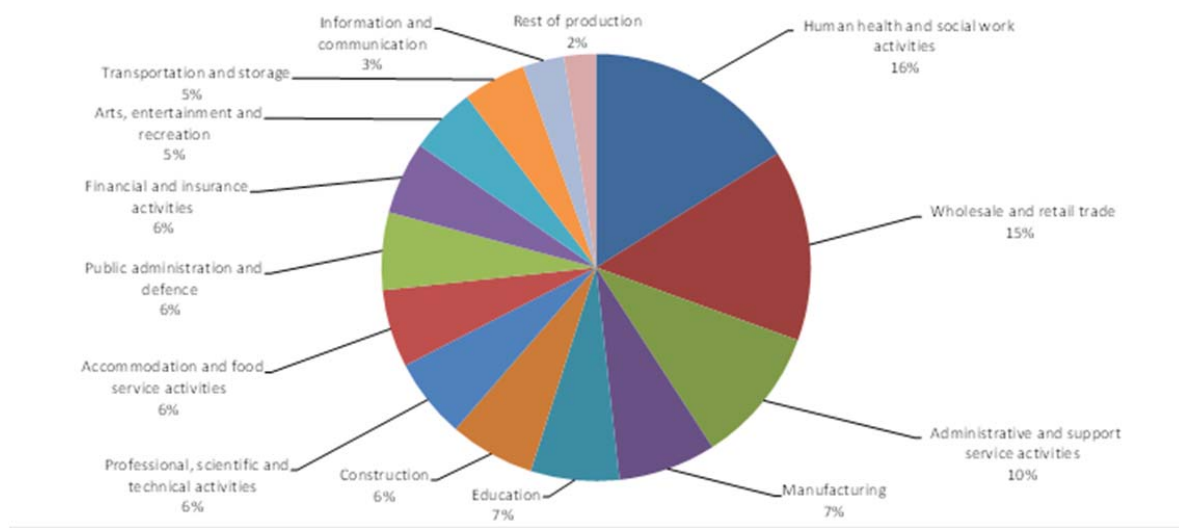
Consistent with the majority of cities in the UK, the Glasgow and the Clyde Valley city region had experienced a declining population until the turning of the 21st century. Population decline in the Glasgow and the Clyde Valley city region was much faster than in Scotland reflecting high levels of outward migration from inner city disadvantaged areas and rising living costs in the more urbanised centres. The migration out of the Glasgow and the Clyde Valley city region was most severe during the 1980s and early 1990s reflecting a period of contraction within the manufacturing sector – a leading sector in area which deteriorated sharply in this time period.

The latest employment data shows that the jobs in the region are broken down as follows (see Figure 6).

- The biggest sector in terms of jobs in the region is health and social work with 16% of total employment
- This is followed by wholesale and retail with a 14% share and admin and support services which accounts for 10% of total employment.
- Business services were the largest sector in the 2010 report with a share of 18%. Split across the new Standard Industry Code 2007 codes it remains unchanged with 10% of total employment in admin and support services, 6% in professional, scientific & technical and 2% in real estate.
- Despite the rapid decline in the 1980s and 1990s the manufacturing sector still holds a significant proportion of overall employment by urban standards, accounting for 7% of total employment.

¹⁸ Please see Background Report 1 - www.clydeplan-sdpa.gov.uk/proposedplan2016

Figure 6: Total employment structure in Glasgow and the Clyde Valley city region (2012)



Source: BRES, Oxford Economics

As might be expected due to its high profile urban status and dominance within the region, the Glasgow and the Clyde Valley city region has a much higher concentration of employment in the service sector – both private and public services. Admin and support services have a percentage share of total employment that is over 2.5 percentage points higher than the Scottish average. Health and social work activities are also a major sector for the Glasgow and the Clyde Valley city region. Despite being an urban area, the region has a smaller share of employment in both accommodation and food services and professional, scientific & technical activities than Scotland.

Table 3: Occupational structure – Glasgow and the Clyde Valley city region and Scotland, 2012

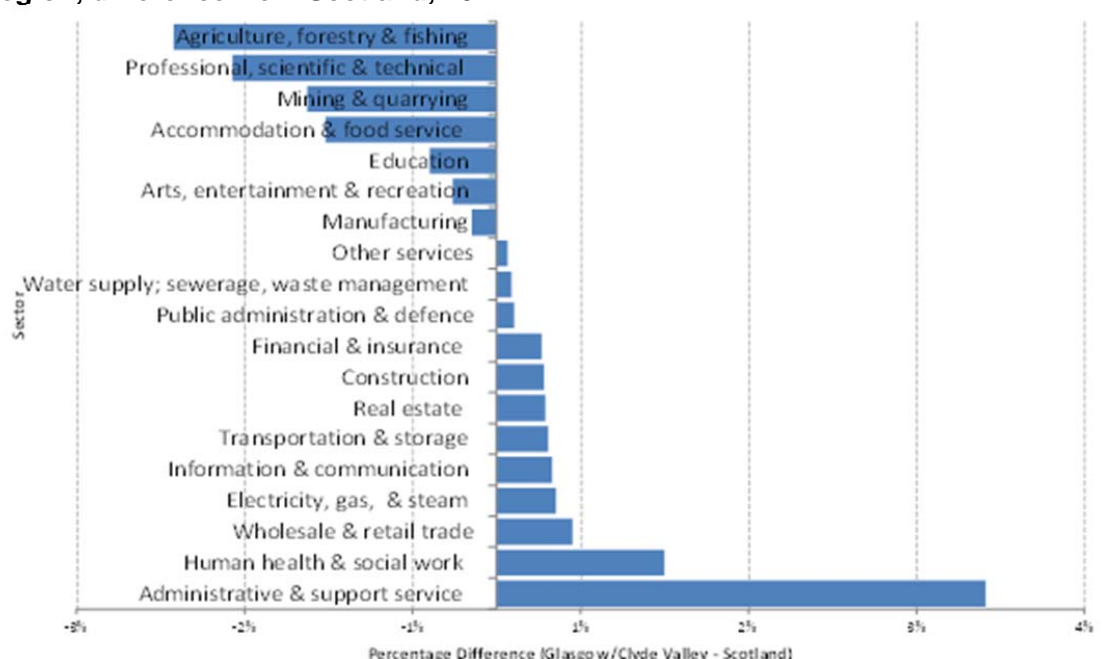
	Glasgow / Clyde Valley	Scotland	Difference from Scotland
Managers & senior officials	7.9%	8.5%	-0.6%
Professional Occupations	19.6%	19.8%	-0.2%
Associate prof & tech occs	12.8%	12.7%	0.1%
Admin & secretarial	11.8%	10.8%	1.0%
Skilled trades occs	9.9%	11.1%	-1.2%
Personal service occs	9.5%	9.4%	0.1%
Sales & customer service	10.3%	9.2%	1.1%
Process, plant & machine	6.8%	6.6%	0.2%
Elementary occs	10.6%	11.2%	-0.6%
Total	100	100	0.0

The occupational structure in Glasgow and the Clyde Valley city region is similar to the Scottish average. The greatest disparity, albeit only 1.2% lower in the Glasgow and the Clyde Valley city region than in Scotland, is in skilled trades. A reduced presence in this classification is compensated by a 1.1% higher representation in the sales & customer service classification and 1.0% higher representation in the admin and secretarial classification. The larger size of these classifications is driven by the higher share of total employment in admin and support services and wholesale and retail sectors relative to Scotland.

The data on skills suggests that Glasgow and the Clyde Valley city region lagged Scotland by 1.0% in 2012 in terms of the proportion of the working age population qualified with an NVQ4+. However the main concern is that the percentage of the working age population with no qualification in 2012 is 13.3% in Glasgow and the Clyde Valley city region, 2.6 percentage points higher than the Scottish average.

Despite the lower skill pool than the Scottish average, skills levels within the area are improving and closing the gap. If we compare the level of skills in Glasgow and the Clyde Valley city region in 2012 to 2008 it can be seen that a marked improvement has occurred. The percentage of the working age population with no qualifications has fallen from 18.0% in 2008 to 13.3% in 2012, a fall of 4.7 percentage points over the period and a narrowing of the gap with Scotland from 4.1 to 2.6 percentage points. Glasgow and the Clyde Valley city region has also experienced a sharp rise in the percentage of the working age population qualified at an NVQ4+ level, rising 5.7 percentage points from 31.8% to 37.5%.

Figure 7: Relative employment concentration - Glasgow and the Clyde Valley city region, difference from Scotland, 2012



Source: Oxford Economics

Table 3: Change in employment - Glasgow and the Clyde Valley city region, 2008-2012

	% Change	
	Scotland	Glasgow/ Clyde Valley
Agriculture	10 %	9 %
Mining and quarrying	12 %	26 %
Manufacturing	-8 %	-11 %
Electricity, gas, & steam	14 %	28 %
Water supply; sewerage, waste management	-2 %	-5 %
Construction	-29 %	-31 %
Wholesale and retail trade	-8 %	-12 %
Transportation and storage	-3 %	-10 %
Accommodation and food service activities	-5 %	-15 %
Information and communication	1 %	4 %
Financial and insurance activities	-12 %	-24 %
Real estate activities	1 %	-4 %
Professional, scientific and technical activities	15 %	-1 %
Administrative and support service activities	3 %	1 %
Public administration and defence	-8 %	-18 %
Education	-11 %	-18 %
Human health and social work activities	-2 %	-3 %
Arts, entertainment and recreation	-1 %	-11 %
Other service activities	-11 %	-19 %
Total	-4 %	-10 %

Source: ~BRES / Oxford Economics

Note: Includes self employed

The table below sets out the occupational structure of the area in the 12 months to December 2012.

Table 4: Occupational structure – Glasgow and the Clyde Valley city region and Scotland, 2012

	Glasgow / Clyde Valley	Scotland	Difference from Scotland
Managers & senior officials	7.9%	8.5%	-0.6%
Professional Occupations	19.6%	19.8%	-0.2%
Associate prof & tech occs	12.8%	12.7%	0.1%
Admin & secretarial	11.8%	10.8%	1.0%
Skilled trades occs	9.9%	11.1%	-1.2%
Personal service occs	9.5%	9.4%	0.1%
Sales & customer service	10.3%	9.2%	1.1%
Process, plant & machine	6.8%	6.6%	0.2%
Elementary occs	10.6%	11.2%	-0.6%
Total	100	100	0.0

The occupational structure in Glasgow and the Clyde Valley city region is similar to the Scottish average. The greatest disparity, albeit only 1.2% lower in the Glasgow and the

Clyde Valley city region than in Scotland, is in skilled trades. A reduced presence in this classification is compensated by a 1.1% higher representation in the sales & customer service classification and 1.0% higher representation in the admin and secretarial classification. The larger size of these classifications is driven by the higher share of total employment in admin and support services and wholesale and retail sectors relative to Scotland.

The data on skills suggests that Glasgow and the Clyde Valley city region lagged Scotland by 1.0% in 2012 in terms of the proportion of the working age population qualified with an NVQ4+. However the main concern is that the percentage of the working age population with no qualification in 2012 is 13.3% in Glasgow and the Clyde Valley city region, 2.6 percentage points higher than the Scottish average.

Despite the lower skill pool than the Scottish average, skills levels within the area are improving and closing the gap. If we compare the level of skills in Glasgow and the Clyde Valley city region in 2012 to 2008 it can be seen that a marked improvement has occurred. The percentage of the working age population with no qualifications has fallen from 18.0% in 2008 to 13.3% in 2012, a fall of 4.7 percentage points over the period and a narrowing of the gap with Scotland from 4.1 to 2.6 percentage points. Glasgow and the Clyde Valley city region has also experienced a sharp rise in the percentage of the working age population qualified at an NVQ4+ level, rising 5.7 percentage points from 31.8% to 37.5%.

Table 5: Education/Skills – Glasgow and the Clyde Valley city region and Scotland for population aged 16-64

	Glasgow / Clyde Valley 2008	Scotland 2008	Difference 2008	Glasgow / Clyde Valley 2012	Scotland 2012	Difference 2012
% with NVQ4+	31.8%	33.1%	-1.3%	37.5%	38.5%	-1.0%
% with NVQ3 only	15.7%	15.5%	0.2%	14.8%	14.7%	0.1%
% with NVQ2 only	12.8%	14.0%	-1.2%	13.8%	14.6%	-0.8%
% with NVQ1 only	9.7%	9.9%	-0.2%	9.7%	10.1%	-0.4%
% with Trade Apprenticeships	5.2%	6.1%	-0.9%	4.5%	5.3%	-0.8%
% with other qualifications	6.8%	7.4%	-0.6%	6.4%	6.1%	0.3%
% with no qualifications	18.0%	13.9%	4.1%	13.3%	10.7%	2.6%
Total	100	100	0.0	100	100	0.0

Source: APS

Benchmarking the GCV city region

Figures 8, 9 and 10 below benchmark the GCV city region against a number of similar and competitor city regions in both Scotland and northern England. Whilst it is difficult to undertake direct comparisons between the city regions as some city regions are of differing scales. In Scottish terms the GCV city region is the largest in terms of population. Whilst of the three English city regions identified, both Manchester¹⁹ and

¹⁹ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/221014/Greater-Manchester-City-Deal-final_0.pdf

Leeds²⁰ are considerably bigger than the GCV area by 45% (2.6 million people) and 67% (3 million people) respectively whilst Liverpool²¹ is of a similar level of population.

These differences in scale are reflected in the employment trends totals from 1991 to 2012 for all the city regions. The GCV performs well against all the Scottish city regions as well as the similarly proportioned Liverpool city region. Its performance post-recession has perhaps been slightly more sluggish than the other city regions but it does seem to indicate that the region is beginning to increase its employment levels.

In terms of productivity levels, the GCV city region outperforms all the other city regions with the exception of Aberdeen and Edinburgh. This could be because on the oil dependent basis of the Aberdeen economy and the benefits that brings to that area. Edinburgh given its financial base has also performed well but it is clear that there is a convergence between the three regions recently and of them the GCV appears to be in the best position to build on its continuing improvements in productivity and the need to invest in skills, management, leadership and strengthening the role of planning as though its ahead of its UK city region competitors, it continues to lag that of the best performing regions

Finally the GVA totals demonstrate that whilst the GCV city region performs strongly and contributes significantly to the Scottish economy there is still a gap between it and Manchester and Leeds areas. The aim will be to build on the strengths of the city region and use them then to drive forward improvements in GVA.

²⁰ <http://www.leedscityregion.gov.uk/about/city-deal/>

²¹ http://www.liverpoollep.org/liverpool_city_region.aspx

Figure 8 Total employment level breakdowns across UK city regions (1991-2013)

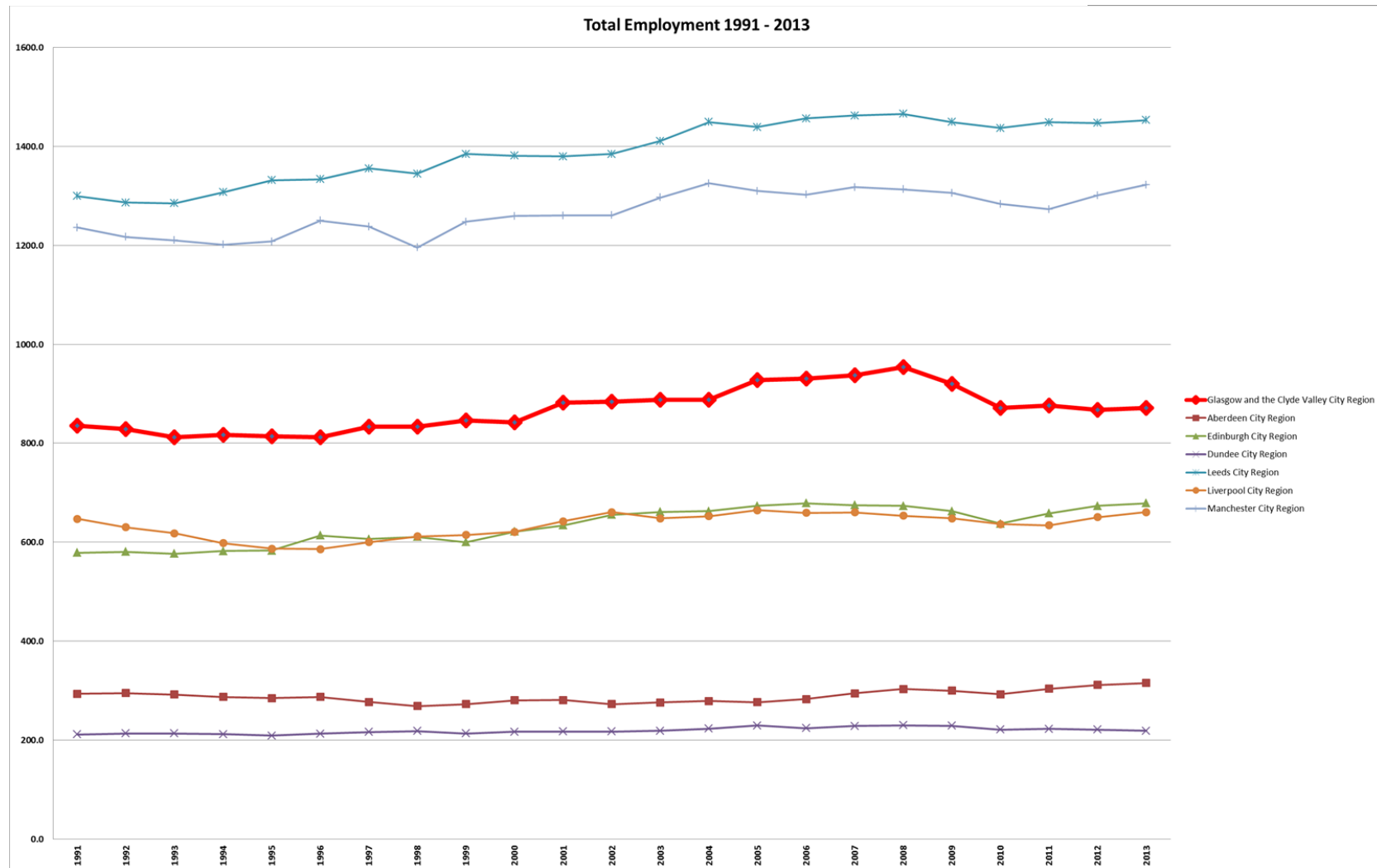


Figure 9 Total productivity level breakdowns across UK city regions (1991-2013)

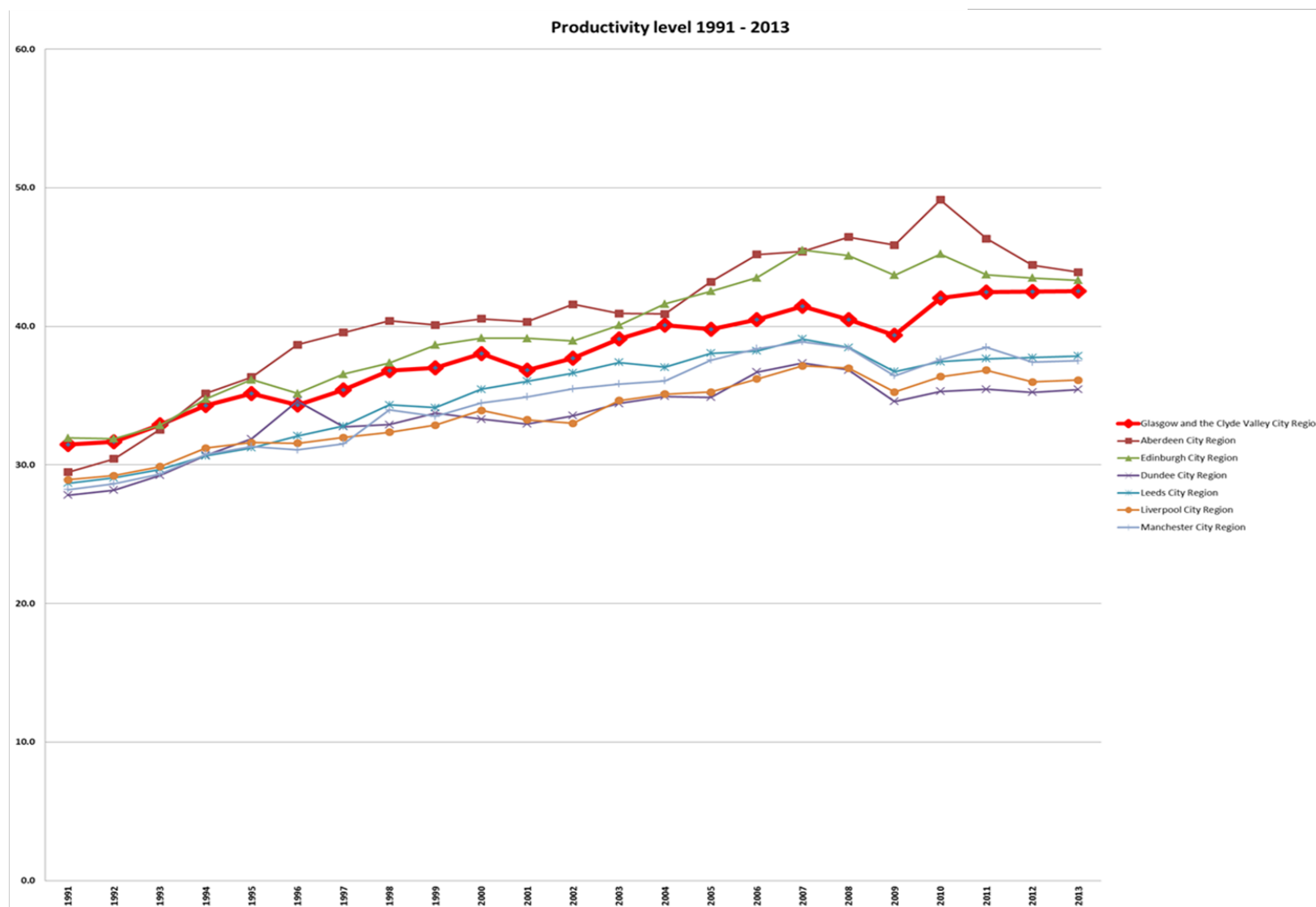
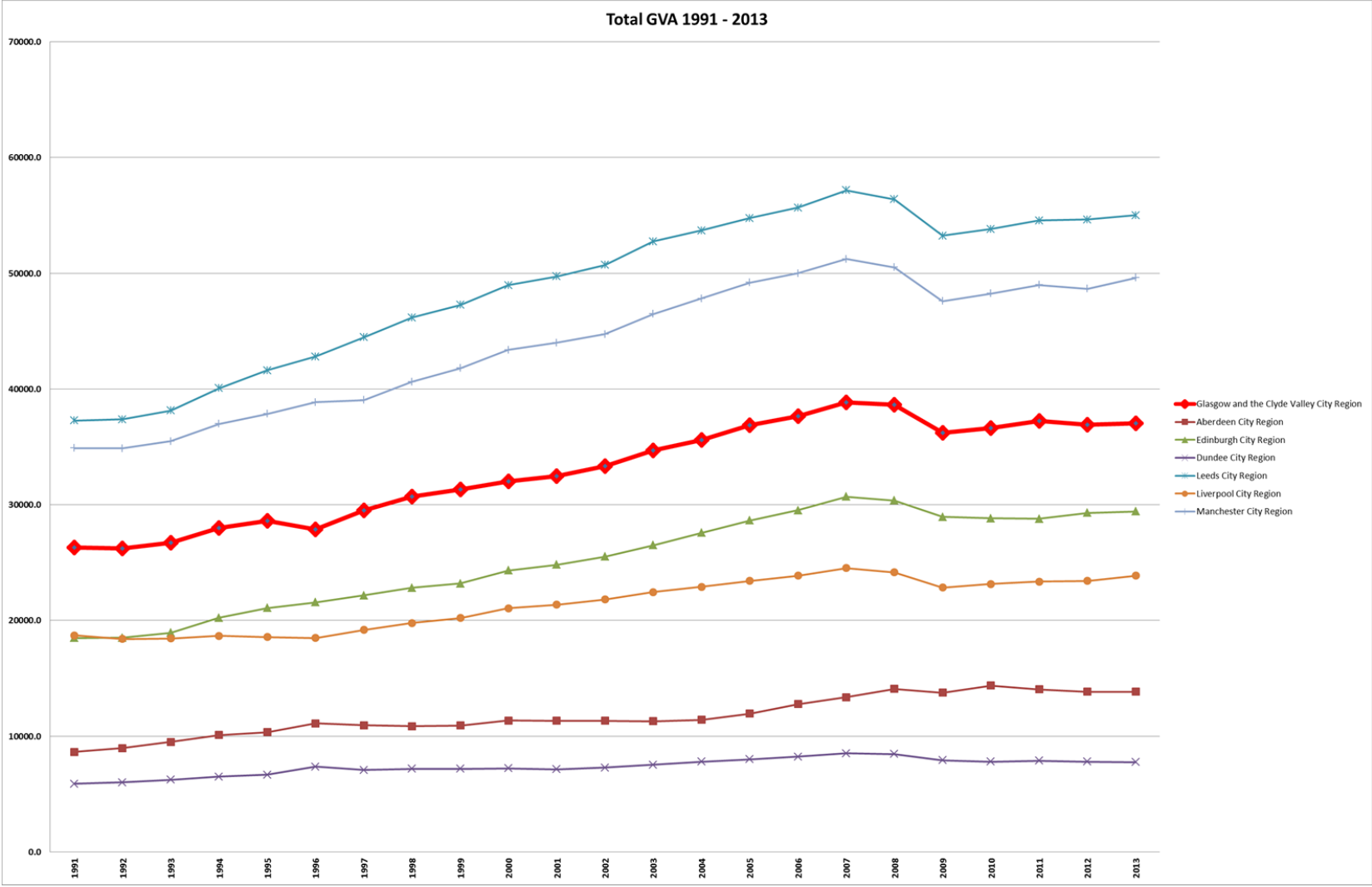


Figure 10 Total GVA breakdowns across UK city regions (1991-2013)



Oxford Economics – Economies within the Glasgow and the Clyde Valley city region analysis

This section will set out the contribution to economic growth from the constituent local authorities to the Glasgow and the Clyde Valley city region.

Resident employment rates are estimated by Oxford Economics based on data from the LFS which is adjusted to be consistent with the census employment rates in 2011. The unemployment rates are calculated as a 12 month average of the claimant unemployment data published on Nomis.

Table 6: Resident employment rate, 2012

	Resident Employment Rate 2012 (%)
East Dunbartonshire	68.2%
East Renfrewshire	71.1%
Glasgow City	64.4%
Inverclyde	66.6%
North Lanarkshire	78.0%
Renfrewshire	66.4%
South Lanarkshire	73.4%
West Dunbartonshire	67.9%
Scotland	72.5%

Source: APS / LFS, Census, Oxford Economics

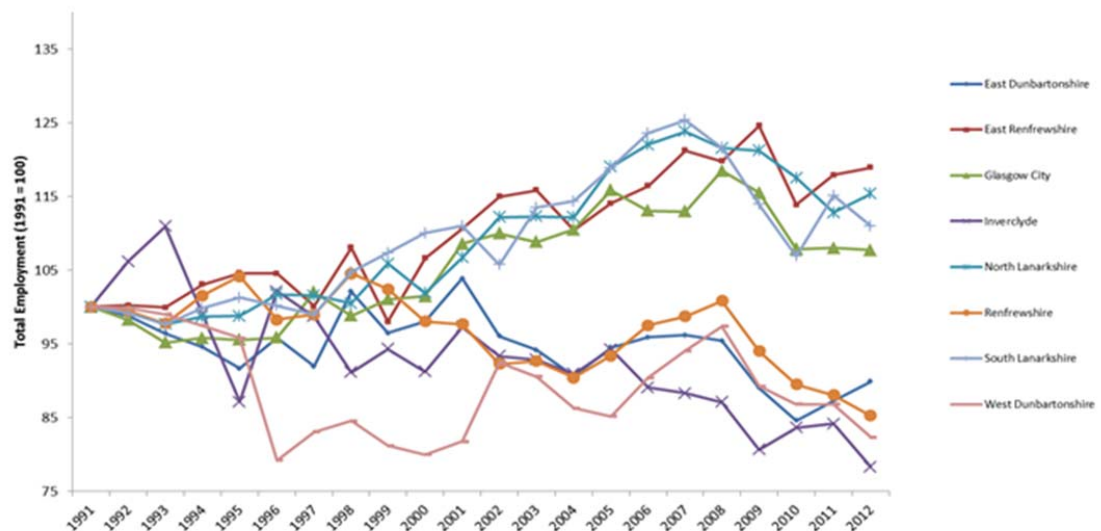
Glasgow City still has the lowest resident employment rate, slipping even further away from the Scottish average in 2012. City regions tend to have lower resident employment rates primarily because of the high living costs in inner city areas driving people out into more built up wealthier suburban areas combined with a higher proportion of students. The unemployment rate has fallen across all localities in the Glasgow and the Clyde Valley city region as Scotland and the UK recover from the recession. In Table 7 it can be seen that West Dunbartonshire has the highest rate of unemployment; sitting at 5.4% this leaves it as the only constituent local authority with unemployment still exceeding 5% in 2013. Glasgow City has the second highest unemployment rate of 4.6%. Glasgow City experienced the fastest fall in unemployment rate over the last 12 months. East Dunbartonshire and East Renfrewshire have the lowest unemployment rate of 1.8%, the only constituent local authorities to have rates below the national average.

Table 7: Unemployment rate change 2012-2013

	Unemployment Rate 2012 (%)	Unemployment Rate 2013 (%)	% Change
East Dunbartonshire	2.5%	1.8%	-0.7%
East Renfrewshire	2.3%	1.8%	-0.5%
Glasgow City	5.6%	4.6%	-1.0%
Inverclyde	5.0%	4.2%	-0.8%
North Lanarkshire	5.1%	4.3%	-0.8%
Renfrewshire	4.5%	3.9%	-0.6%
South Lanarkshire	4.3%	3.7%	-0.7%
West Dunbartonshire	6.2%	5.4%	-0.8%
Scotland	3.9%	3.2%	-0.7%

Source: Nomis

Figure 11: Total employment – Glasgow and the Clyde Valley city region local authorities, 1991 – 2012 (1991=100)



Only half of the local authorities that comprise the Glasgow and the Clyde Valley city region have higher levels of total employment in 2012 than in 1991 – these are East Renfrewshire, Glasgow City, North Lanarkshire and South Lanarkshire.

The greatest increase in total employment is found in the largest local authority Glasgow City with a gain of 30,000 jobs. Despite an increase of 18,000 in North Lanarkshire and 13,000 in South Lanarkshire the total increase in the Glasgow and the Clyde Valley city region is only 2,000 above the rise in Glasgow City alone. Renfrewshire exhibits the largest decline in total employment, falling by 17.3%, 13,000 jobs losses. The local authority that has suffered the greatest percentage fall in total employment is Inverclyde which has seen employment contract by 27.7% - equivalent to 8,000 job losses.

Table 8: Total employment growth by local authority, 1991-2012

	1991-2012	% Change
East Dunbartonshire	-3,000	-11.3%
East Renfrewshire	4,000	15.9%
Glasgow City	30,000	7.2%
Inverclyde	-8,000	-27.7%
North Lanarkshire	18,000	13.3%
Renfrewshire	-13,000	-17.3%
South Lanarkshire	13,000	9.9%
West Dunbartonshire	-7,000	-21.4%
Glasgow/Clyde Valley	32,000	3.7%

Future context for the Clyde Valley city region

Oxford Economics (OE) also provided an outlook for the city region up to 2038 and this included a summary of the global and macro forecasts which sets the wider context for the city region in the long term.

2013 has seen a welcome return to growth, with all parts of the private sector in Glasgow and the Clyde Valley city region and Scotland participating. In particular the labour market has been stronger than past relationships between output growth and employment would have suggested. Better job prospects and an improved availability of housing finance have given the household sector enough confidence to reduce precautionary saving, so boosting consumption spending.

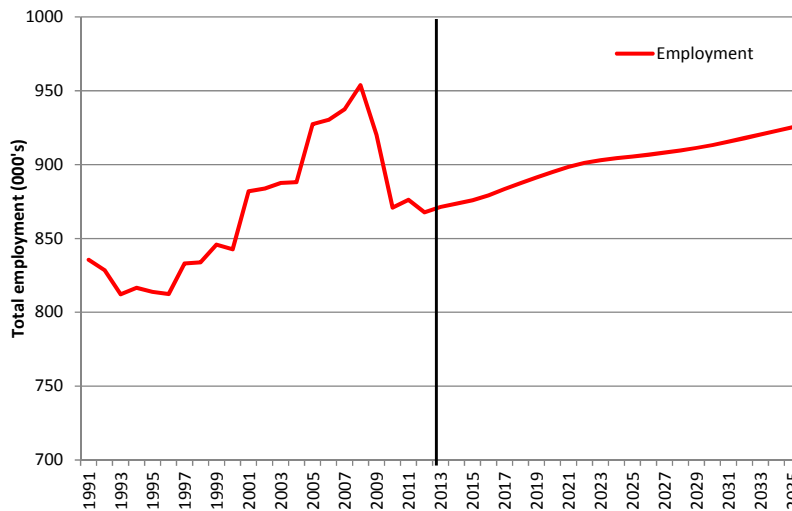
The baseline forecasts suggest that, despite a growing population, Glasgow and the Clyde Valley city region will not regain pre-crisis peak levels of employment until after the end of the forecast horizon to 2038. Over the course of the next decade (2013-23) the base employment forecast projects an increase of 32,000 jobs, recovering around only 40% of the post-crisis employment loss. In GVA terms the Glasgow and the Clyde Valley city region is forecast to grow by 2.6% in the 2013-23 period, the same pace as the Scottish economy as a whole. Some of this growth represents a catching up from the crisis and the projection for the fifteen years from 2023 sees annual GVA growth averaging 2.5%, again in line with the Scottish average.

The goal of the Government Economic Strategy is to “deliver faster sustainable economic growth with opportunities for all to flourish”. The outlook reveals that the Glasgow and the Clyde Valley city region will remain a key contributor of economic growth. The baseline forecasts suggest that the city region is expected to create over 30% of new Scottish jobs over the decade ahead. The area will remain a dominant centre for business services²² (a key driver of the recovery), with one in every three business services jobs expected to be created within the Glasgow and the Clyde Valley city region. As the recovery gathers pace, unemployment is expected to continue to fall, consumer confidence will rise and growth in earnings will return. This will help to relieve pressure of households and provide a greater sense of economic security.

²² Defined as professional services plus admin and support activities

The forecast shows total employment in the Glasgow and the Clyde Valley city region growing by 2,300 (0.3%) in 2014 and by 2,200 (0.4%) in 2015. Thereafter total employment, which bottomed out in 2012 at 867,600, is expected to grow by 0.3% per annum. Nevertheless, total employment remains below its 2008 peak of 954,000 throughout the period to 2038.

Figure 12: Total employment in Glasgow and the Clyde Valley city region, 1991-2038



Source: BRES, Oxford Economics

As is the case for Scotland as a whole, the growth in total employment depends critically on business-oriented services. Administrative and support services, the only sector of the economy to show meaningful employment growth over the 2008-13 period.

Professional scientific and technical activities, real estate activities and Information and communication are projected to add just over 34,000 jobs in the decade to 2023 and a further 27,000 jobs in the fifteen years to 2038. This compares with net job growth for Glasgow and the Clyde Valley city region of 32,000 and 29,000 over these respective periods.

By 2023 25% of jobs in Glasgow and the Clyde Valley city region are expected to be in these business-oriented service activities. This compares with 20% on the eve of the financial crisis in 2007 and 22% in 2013.

Table 9: Sectoral employment change in Glasgow and the Clyde Valley cityregion

	1998-2008 (000s)	2008-2013 (000s)	2013-2023 (000s)	2023-2038 (000s)
Agriculture, forestry and fishing	1.1	-0.3	-0.3	-0.4
Mining and quarrying	-0.3	0.3	-0.2	-0.3
Manufacturing	-44.1	-8.3	-7.0	-13.3
Electricity, gas, & steam	0.2	1.9	-0.8	-1.0
Water supply; sewerage, waste management	-0.7	-0.4	-0.7	-0.9
Construction	9.3	-17.7	7.7	8.7
Wholesale and retail trade	8.3	-12.4	0.5	-2.5
Transportation and storage	0.6	-4.1	3.3	-1.0
Accommodation and food service activities	5.2	-8.6	4.1	1.1
Information and communication	6.3	1.1	4.0	1.7
Financial and insurance activities	12.2	-8.7	0.0	-0.4
Real estate activities	9.0	0.1	3.8	3.5
Professional, scientific and technical activities	14.7	-1.9	9.2	7.8
Administrative and support service activities	22.6	7.4	17.1	13.7
Public administration and defence	8.8	-10.0	-8.6	-0.2
Education	9.9	-9.6	-3.4	0.3
Human health and social work activities	44.1	-4.5	-2.4	8.4
Arts, entertainment and recreation	5.7	-2.6	3.0	2.2
Other service activities	6.9	-4.4	2.8	2.3
Total	120.0	-82.6	31.8	29.6

Source: BRES, Oxford Economics

The construction sector is also likely to see increasing employment through the period to 2038. However, the projected growth of 8,000 in the ten years to 2013 only claws back half of the job losses in the 2008-13 period and, even further job growth of 9,000 in the fifteen years to 2038 would leave total employment a little below its peak level in 2008. Arts, entertainment and recreation and accommodation and food service are two other sectors where employment growth is projected through the period to 2038, each adding around 5,000 jobs or 23% and 10% respectively of employment levels in 2013.

However, in the case of accommodation and food services this means that the sector remains smaller than in 2008 throughout the forecast horizon.

Wholesale and retail employment is forecast to stabilise over the next decade but to decline slightly in the fifteen years to 2038. In 2008 Wholesale and retail employment accounted for 15% of total employment in Glasgow and the Clyde Valley city region, but 2023 this share is projected to be 14%, falling to 13% by 2038. The sector continues to be challenged by online competitors and reduced consumer spending. Indeed, we think that the pace of the consumer recovery is likely to be cooling. After a sharp drop in the savings ratio last year, the scope to reduce savings further is limited, and while the prospects for household incomes are brighter, it will take some time before spending power is sufficiently strong to support the rates of consumption growth seen recently.

The long-term decline in employment in manufacturing is projected to continue, with employment dropping at an annual average rate of 1.5% over the twenty-five years to 2038, a loss of over 20,000 jobs. This does not mean that manufacturing in Glasgow and the Clyde Valley city region will be unsuccessful, rather it reflects continuing technologically-driven productivity growth in the sector and the migration of the classification of many previously manufacturing-type functions into the expanding business services sector.

The public sector is forecast to lose 15,000 jobs in the decade to 2023. This comes on top of the 24,000 jobs lost in the 2008-13 period. More than half of these jobs will be lost from Public administration and defence, with Education losing 3,500 jobs and Health 2,500. In the fifteen years from 2023 employment in Health is projected to rise by over 8,000, while that in Education and Public Administration is broadly flat. This means that the share of Glasgow and the Clyde Valley city region employment in the public sector is projected to fall from 6% in 2013 to 5% in 2023 and 4% in 2038.

Key growth sectors

This section focuses on the outlook for the key growth sectors as defined by the Scottish Government. As part of this project, Oxford Economics developed a model to produce employment forecasts of these sectors. The forecasts set out below are consistent with the conditions and assumptions set out in the previous section of this report. Please note: these are based upon different definitions to those set out above and cannot be directly compared.

Notably, the financial services sector which was an important generator of employment growth in the decade to 2008 is projected to show no growth in jobs over the next twenty five years. The financial services industry plays a significant role in the areas economy, currently accounting for 4% of all employment and generating 7% of economic output. Financial services will continue to contribute positively towards economic growth, but this is likely to be achieved without a substantial increase in financial services employment as a result of increases in productivity. Thus all the projected employment growth in the Financial and Business services 'growth' sector of 9,000 in the ten years from 2013 and of 7,000 in the fifteen years from 2023 is down to the business services segments of this key sector. Such growth is underpinned by growth within the professional services sub-sectors such as legal and accounting services also other business support activities such as call centres and office administration. The sector is a key employer of graduates and such opportunities should help to retain some of the young talented people within the area. Employment growth within financial and business services is expected to average 1% per annum over the decade ahead, significantly above the average of 0.4% for overall employment.

Table 10: Sectoral employment change by key growth sector in Glasgow and the Clyde Valley city region

	1998-2008 (000s)	2008-2013 (000s)	2013-2023 (000s)	2023-2038 (000s)
Creative Industries	6.7	-6.4	4.0	1.9
Energy (including renewables)	0.7	2.5	-0.8	-1.1
Financial and Business Services	29.0	-2.6	8.9	6.6
Food and Drink	-5.7	0.1	-1.4	-3.2
Life Sciences	-2.0	-1.0	0.3	-0.2
Tourism	5.8	-7.7	4.7	1.7
Universities	2.4	-4.3	-0.9	0.0
Total employment	120.0	-82.6	31.8	29.6

Source: BRES, Oxford Economics

The numbers of jobs within the tourism sector are projected to increase in both the medium and longer term, with nearly 5,000 (0.9% per annum) additional jobs in the next decade and further growth of nearly 2,000 in the fifteen years thereafter. Growth within this sector is also expected to outstrip the overall average. The area plays host to the

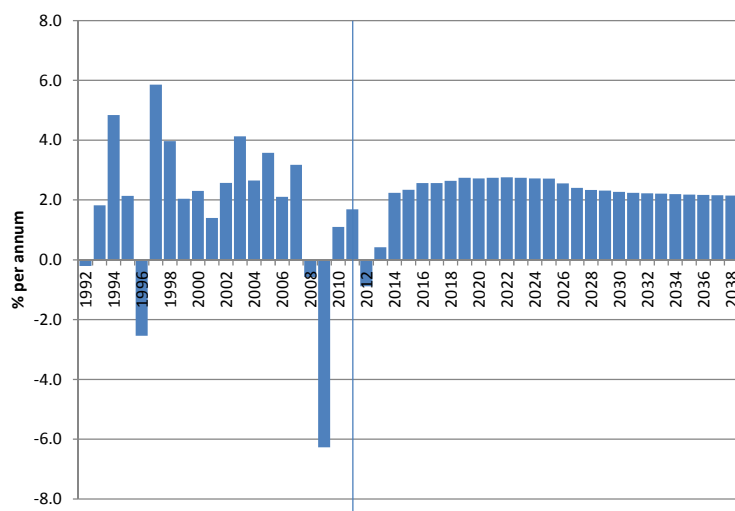
2014 Commonwealth Games, MTV Music Awards and International Festival of Visual Art which are all expected to attract a significant amount of tourists to the area. Also as the recovery gathers pace and incomes begin to rise, the area's attractions including the country parks, M&D's Theme Park and Xscape should also attract visitors to the region. A similar pattern is expected in the creative industries, with an increase of 4,000 jobs in the ten years to 2023 followed by an increase of 2,000 in the period to 2038. Growth within the creative industries (1.1% per annum) is also expected to outperform the overall average (0.4% per annum). As the recovery gathers pace, demand for creative industries will rise given the diverse nature of the sector. Growth within television and music production, software development and professional services sectors such as advertising, marketing and architecture are all expected to be key contributors to growth. Creative industries is one of the most highly qualified sectors and the sectors links with the education institutions will help to provide the talent required to drive such growth. Life Sciences currently accounts for just over 4,000 jobs within the area (1% of total employment). The outlook suggests that employment within the sector is forecast to change little from current levels, rising marginally to 2023 but then falling marginally over the next fifteen years. This outlook is driven by the forecast by parts of the manufacturing and professional services subsectors. Increases in productivity suggest that economic growth within the sector is likely to be achieved without substantial increases in employment.

The other key growth sectors – Energy (including renewables), Food and Drink and Universities are all projected to see employment falls, though these are marginal in the case of Universities. Our forecasts for job losses in these sectors are significantly less than we have seen over the past 10-20 years, and this partly reflects restructuring in the industry, but is also consistent with efforts by governments and others to support the industry. It is worth noting that despite the relatively weak employment forecasts, these sectors are likely to continue to play a key role contributing to the economic growth of the area.

GVA

Following the pattern of GVA growth for the UK and Scotland as a whole, the forecast sees sustainable growth for Glasgow and the Clyde Valley city region over the forecast horizon. The fastest growth is over the next ten years as the economy makes up some of the lost ground caused by the financial crisis and subsequent recession. Between 2014 and 2023 the GVA growth rate (average per annum) for Glasgow and the Clyde Valley city region stands at 2.6%. This subsides to 2.3% over the 2023 to 2038 period. These growth rates are similar to those for Scotland as a whole and with 3.0% and 2.5% for the UK over the same period. Thus in GVA terms Glasgow and the Clyde Valley city region is expected to grow at a similar rate as Scotland but lagging behind the UK.

Figure 13: GVA growth in Glasgow and the Clyde Valley city region, 1971-2038



Source: Regional Accounts, Oxford Economics

Future risks

There remain several sources of vulnerability that could lead to weaker outturns than our current forecast. The UK consumer is a key area of risk, with more aggressive retrenchment a possibility. There is also uncertainty around the labour market, where the recent slump in productivity (employment has remained remarkably resilient through the recession) could mean the recovery sees weaker job creation than forecast. But it could also reflect a structural change that implies poorer medium-term growth prospects. There are also a number of risks to the international economy which would have a detrimental effect on the outlook for the UK economy. These include:

- The Eurozone slides into deflation
- US consumer disappoints
- Capital flows from emerging markets

The probability of each of these shocks is relatively low. Nonetheless, they illustrate how the UK's economic recovery could be put at risk. Under such conditions, Scotland and the Clyde Valley economies would be detrimentally affected by these developments.

Glasgow and the Clyde Valley city region strategic remarks

Whilst the forecasts presented in the OE paper contain, like all forecasts, an element of uncertainty they illustrate the broad outlines of the economic background against which planning and spatial policy decisions will be taken. OE believes that there are a number of strategic considerations that flow from the analysis presented above.

- Employment growth **drivers are likely to remain city-centric**, since the fastest growing sectors in employment terms, such as business services, are those for which close proximity with other specialist, knowledge-intensive businesses provides a more stimulating environment, with particular benefits flowing from the

development of inter-related networks of firms. Understanding Glasgow and the Clyde Valley city region's underperformance relative to Scotland as a whole in high level business services in the post-crisis period would provide a basis for adjusting planning and economic development policies to maximise the potential of this sub-sector to the Glasgow economy.

- City-centric employment growth emphasises the need to:
 - address **transportation challenges** to maximise access to key city centre locations, while minimising costs to commuters and to the environment;
 - encourage **city-centre living**;
 - facilitate **business start-ups and growth** in high-value service activities.
- **Future growth will depend more on external demand.** Maintaining and increasing the region's connectivity with the rest of the UK, Europe and further afield is an important potential ingredient in this growth, with important feedback loops in that economic success is likely to provide the demand that increase the degree of connectivity with external markets. The quality of Glasgow's rail links with the rest of Scotland and the UK, and the range, frequency and affordability of flights from Glasgow's airports are critical inputs to both the development of export opportunities and on increasing the regions draw as a tourist destination.
- **The changing face of retailing offers both challenges and opportunities.** The likelihood that most vacant shop units outside the central areas of towns/cities will be re-occupied by retail operations is low. Finding new uses for these vacant sites would have a significant pay-off in terms of vibrancy and amenity, while the increasing use of 'internet' shopping opens up opportunities for new logistical structures and channels.
- A growing but also an ageing population is likely to **change the ideal mix of housing provision**. Developments which allow older house owners to downsize can have multiple benefits. These include releasing housing stock suitable for family occupation, providing capital to fund higher living standards in retirement and more suitable accommodation for older people that reduces the burdens on the care system. Increased availability of affordable family-sized accommodation is likely to provide one of the key attractions to potential migrants to the Glasgow and the Clyde Valley city region.

Appendix B Industrial and Business Land Supply

Monitoring of Industrial and Business Land

The SDP also seeks to ensure that the quantity, quality and distribution of the available industrial and business land continues to meet the level of demand for all types of industrial and business proposals that may emerge.

Past trends in take-up of land identified through monitoring are used as the basis for likely future development and the Industry and Business Monitoring Survey is undertaken annually. The survey requires that each local authority monitors a range of issues in detail including:

- the level of overall marketable land supply in terms of brownfield and greenfield supply;
- the level of the industrial and business land supply within Strategic Economic Investment Locations (SEILs)
- the overall level of take-up across the city region and within SEILs;
- a comparison of land supply and the 10-years demand for marketable land.

Key monitoring findings

Table 1 Marketable Land Supply 2013-14 (hectares)

Local Authority	Brownfield	Mixed	Greenfield	Total
East Dunbartonshire	33.61		-	33.61
East Renfrewshire	17.61	1.15	7.92	26.68
Glasgow City	72.21		57.02	129.23
Inverclyde	25.08		2.5	27.58
North Lanarkshire	157.95		166.43	324.38
Renfrewshire	84.61		51.46	136.07
South Lanarkshire	68.35		68.21	136.56*
West Dunbartonshire	16.92		18.74	35.66
Glasgow and Clyde Valley	476.34	1.15	372.28	849.77

* Excludes South Lanarkshire Class 8 Poniel site at 74.30ha all Greenfield
Source Clydeplan Annual Monitoring Data

Table 1 indicates the overall marketable land supply by Local Authority in 2014:

- The total for this year has decreased from 892 ha in 2012/13 to 849ha in 2013/14. This decrease of 43ha of overall marketable land represents a 4.82% overall decrease.
- With 324.38 ha of marketable land North Lanarkshire has the highest supply of all eight authorities with 38% of all Marketable Land contained in GCV area. More than double the next highest South Lanarkshire which has 136.56 ha. While Renfrewshire and Glasgow have similar at 136.07 ha and 129.23 ha respectively.
- East Renfrewshire with 26.68ha has the lowest amount of marketable land.

Table 2 Marketable land supply (Ha) in SEILs 2013/14

Local Authority SEIL Total/Specific SEIL	2013/14	2012/13	% Change since 2012/13
East Dunbartonshire	n/a	n/a	n/a
East Renfrewshire	n/a	n/a	n/a
Glasgow City (SEILs total)	35.08	47.83	-26.66
Glasgow City Centre	-	-	-
City Science (ITREZ)	-	-	-
International Financial Services District	-	-	-
Pacific Quay	9.03	9.6	-5.94
Clyde Gateway	3.68	15.02	-75.50
Hillington/Renfrew North		-	-
Robroyston	20.29	21.12	-3.93
West of Scotland Science Park	2.08	2.08	No change
Inverclyde (SEILs total)	5.38	5.72	-5.94
Inverclyde Waterfront	5.38	5.72	-5.94
North Lanarkshire (SEILs total)	282.88	271.75	+4.10
Eurocentral	143.87	132.74	8.38
Gartcosh	47.53	47.53	No change
Ravenscraig	91.48	91.48	No change
Renfrewshire (SEILs total)	86.46	108.8	-20.5%
Bishopton	40.3	40.3	No change
Hillington/Renfrew North	29.3	28.27	3.5
Glasgow Airport Investment Area ²³	16.86	40.2	-58% ²⁴
South Lanarkshire (SEILs total)	17.49	20.89	-16.28
Clyde Gateway	12.28	10.38	18.30
Scottish Enterprise Technology Park	5.21	5.21	No change
Peel Park North	-	5.3	100%
Hamilton International Technology Park	-	-	-
Poniel*	-	-	-
West Dunbartonshire (SEILs total)	30.42	30.01	+1.37
Clydebank Riverside	6.85	8.81	-22.25
Lomondgate	23.57	21.2	11.18

²³ The 2013/14 figure does not include the additional 36 ha (Nehterton Farm area, not currently marketable) within GAIA which would become available following City Deal investment

²⁴ This figure reflects the change that has occurred at GAIA as the previous Linwood component has been removed to reflect SDP2.

Glasgow and Clyde Valley (SEIL total)	481.3	485	-0.76
% of total GCV marketable land in SEILs	56.64%	54.35%	+2.29%

* There is 74.3ha land with ppp for class 5/6

Figure 1 Marketable land supply (Ha) in SEILs 2013/14 by Local Authority

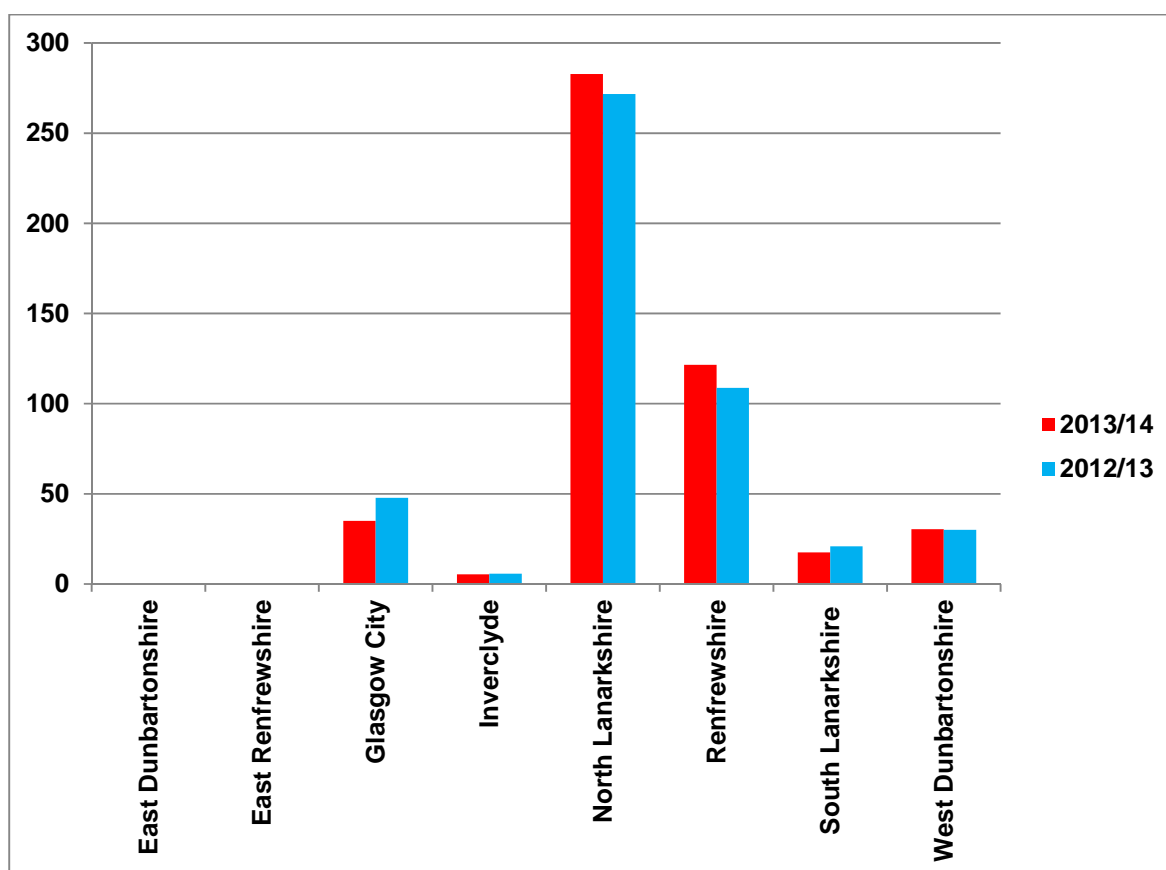


Table 2 and Figure 1 show the breakdown of marketable supply in the Strategic Economic Investment Locations (SEILs). This monitoring year – 2013/14 – is the second year this data has been collected since the SDP was approved by Scottish Ministers in May 2012. The SEILs themselves represent 56.64% of the total marketable land in the GCV city region. This represents an increase of 2.29% since 2012/13.

Both East Dunbartonshire and East Renfrewshire have no SEILs within their boundary. Of the six constituent Authorities that have SEILs within their boundaries the breakdowns are as follows:

- Glasgow City - 35.08ha (27.15% of the total marketable supply in the Authority) This is a 26.66% reduction in their marketable supply in their SEILs since 2012/13.

- Inverclyde - 5.38ha (19.51% of the total marketable supply in the Authority) This is a 5.94% reduction in marketable supply in their SEILs since 2012/13
- North Lanarkshire - 282.88ha – this is the highest amount of all the constituent Authorities (87.21% of the total marketable supply in the Authority) This is a 4.1% increase in marketable supply in their SEILs since 2012/13.
- Renfrewshire – 86.46ha (64% of the total marketable supply in the Authority) This is a 20.5% decrease in marketable supply in their SEILs since 2012/13. Land at Linwood which was previously identified within the SEIL has been removed from the figures to reflect the position in SDP2. Also 36 ha of land within GAIA which would become available following City Deal investment has not been included in this figure.
- South Lanarkshire - 17.49 ha (12.81% of the total marketable supply in the Authority) This is a reduction of 16.28% in marketable supply in their SEILs since 2012/13.
- West Dunbartonshire - 30.42ha (85.3% of the total marketable supply in the Authority) This is an increase of 1.37% in their marketable supply in their SEILs since 2012/13.

**Table 3 Take Up within Strategic Economic Investment Locations (SEILs)
(2013/14)**

SEIL	Take Up (Ha)	Marketable land supply (Ha) in SEILS 2013/14	Take up as a % of total marketable supply in SEIL(s)
East Dunbartonshire	n/a	n/a	n/a
East Renfrewshire	n/a	n/a	n/a
Glasgow City	4.31	35.08	12.29
Glasgow City Centre	1.52	-	-
City Science (ITREZ)	-	-	-
International Financial Services District	-	-	-
Pacific Quay	-	9.03	-
Clyde Gateway	2.79	3.68	75.82
Hillington/Renfrew North	-		-
Robroyston	-	20.29	-
West of Scotland Science Park	-	2.08	-
Inverclyde	-	5.38	-
Inverclyde Waterfront	-	5.38	-
North Lanarkshire	13.94	282.88	4.93
Eurocentral	13.94	143.87	9.69
Gartcosh	-	47.53	-
Ravenscraig	-	91.48	-
Renfrewshire	0.4	86.46	0.46
Bishopton	-	40.3	-
Hillington/Renfrew North	-	28.87	-
Glasgow Airport Investment Area	0.4	16.86	0.98
South Lanarkshire	9.38	17.49	53.63
Clyde Gateway	-	12.28	-
Scottish Enterprise Technology Park	-	5.21	0.00
Peel Park North	-	-	-
Hamilton International Technology Park	-	-	-
Poniel	9.38	-	-
West Dunbartonshire	-	30.42	-
Clydebank Riverside	-	6.85	-
Lomondgate	-	23.57	-
TOTAL	28.03	480.56	5.83

Figure 2 Take Up within Strategic Economic Investment Locations by Local Authority (SEILs) (2013/14)

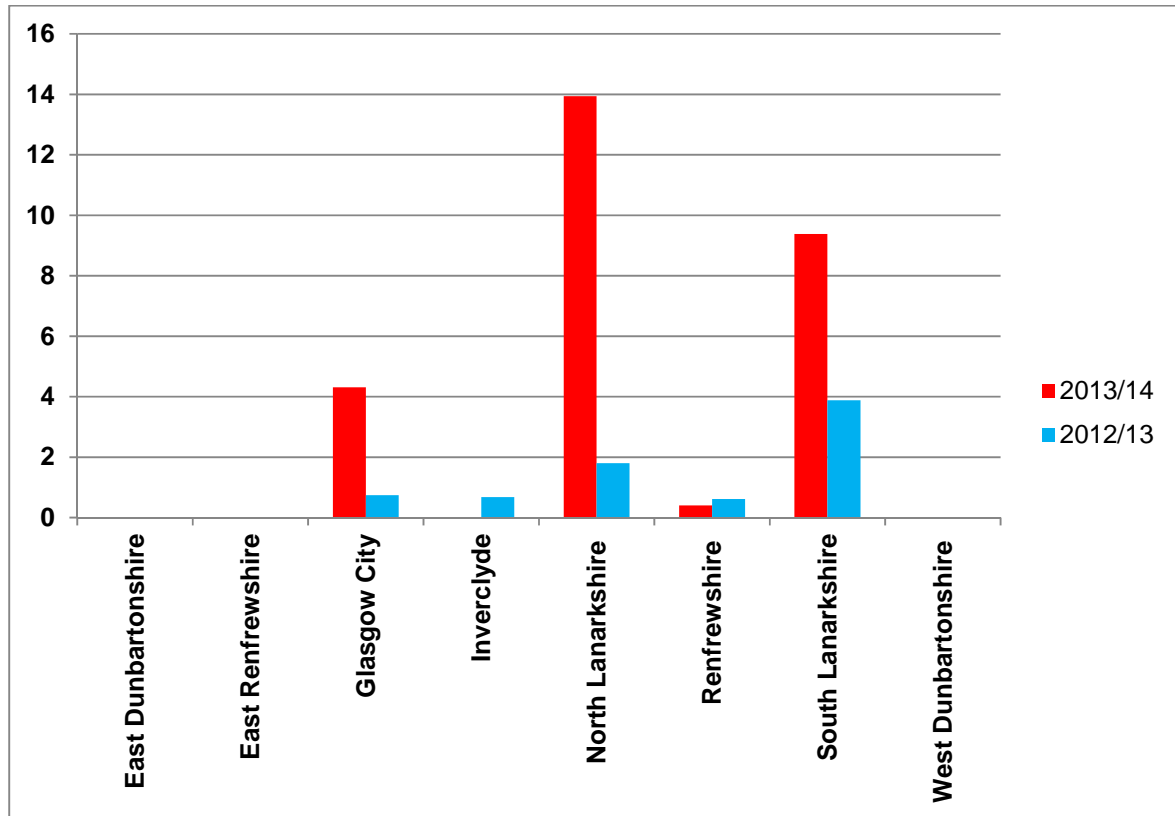


Table 3 and Figure 2 show the breakdown of take up in the Strategic Economic Investment Locations (SEILs). This monitoring year – 2013/14 – is the second year this data has been collected since the SDP was approved by Scottish Ministers in May 2012. The take up in the SEILs represents 53.92% of the total take up in 2013/14 (Table 4 below).

Both East Dunbartonshire and East Renfrewshire have no SEILs within their boundary. Of the six constituent Authorities that have SEILs within their boundaries the breakdowns are as follows:

- Glasgow City – 4.31ha (represents 35.8% of the total take up in the Authority)
The remaining 64.2% of take up took place out with their SEILs
- Inverclyde – no take up in their SEIL in 2013/14 (represents 0% of the total take up in the Authority) Inverclyde had 2.27ha take up out with their SEIL.
- North Lanarkshire – 13.94ha (represents 75.68% of the total take up in the Authority) North Lanarkshire had 24.32% of their take up out with their SEILs
- Renfrewshire – 0.4ha (represents 21.74% of the total take up in the Authority)
The remaining 78.26% of take up took place out with their SEILs
- South Lanarkshire – 9.38 ha (represents 59.14% of the total take up in the Authority) The remaining 40.86% of take up took place out with their SEILs

- West Dunbartonshire – no take up in their SEILs in 2013/14. West Dunbartonshire had 0.87ha take up out with their SEIL.

Table 4 Take up in SEILs as a % of the city region total

Take up in SEILs at GCV city region level (Hectares)	28.03
Take up in SEILs as a % of the total take up	53.92%

The industrial and business land supply is recorded in 15 categories.

- Category 1: **Confirmed Marketable Sites.** Sites with no servicing problems, in good locations and considered marketable by all parties.
- Category 2: **Potential Marketable Sites.** Sites which could be marketed but which require some improvements in terms of promotion, appearance or servicing.
- Category 3: **Remain in Industry Sites.** Additional sites in predominantly older industrial areas.
- 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 Other Use.** Sites that could be re-allocated from industry and business.
- Category 6: **Review to Environmental Improvement.** Sites with little potential for industry or other urban uses but which if improved could aid amenity or open space aspects of surrounding areas, including stalled spaces.
- Category 7: **Review to Housing Potential.** Sites which are surplus to requirements for industry, but which might form a useful addition to the stock of infill housing sites.
- Category 8: **Sites in Rural Areas**
- Category 9: **Review Sites in Rural Areas.**
- Category 10: **Specialised Sites.** Sites with unique circumstances/specific need at location.
- Category 11: **Developed for Industry or Business.**
- Category 12: **Site developed for non-industrial/business purposes**
- Category 13: **Reallocated site no longer identified in the industry and**

business land supply.

Category 14: **Land in use for industrial/business purposes, including storage use, but where no physical development has taken place.**

Category 15: **Airport related use which includes the option of industrial use.**

For the purposes of analysis, the categories are grouped and defined as follows:

a) **Marketable Supply:** Categories 1, 2 and 8.

The concept of marketable land is central to the allocation and monitoring of the industrial land supply. For the purposes of Structure Plan monitoring, the following definition of marketable industrial land is taken. This is based on the definition within NPPG 2: Business and Industry (1993) and is consistent with advice in Scottish Planning Policy 2: Economic Development.

Marketable land should be:

1. Designed for industrial, business and storage and distribution purposes in a development plan (including sites agreed in principle but not yet allocated in 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 insurmountable constraint on servicing capability or other obstacle to development (i.e. potentially marketable). Such land will be available within 1-5 years or could be made available within 1-5 years; and
3. connected to the motorway and trunk road/rail network with access existing or easy to arrange, in a location which allows for good access by sustainable modes of transport; and,
4. will normally be capable of accommodating a broad range of development without significant adverse environmental impact.

b) **Non-Marketable Supply:** Categories 3 and 4.

Land allocated for industry and business that is not part of the marketable or potentially marketable supply such as Category 3 sites which are considered suitable for local use for industry and Category 4 sites which are reserved for a firms "expansion".

c) **Review Sites;** Categories 5, 6, 7, and 9.

These categories contain sites that have the potential for review through the Local Plan process to other uses such as housing or environmental improvements. (Industrial sites under review to other uses in Draft Local Plan stages are considered to be part of the non- marketable supply until the review is confirmed by the Finalised Local Plan when they are then removed from the supply).

d) **Specialised Sites:** Category 10.

These sites are required by SPP 2 to meet specialised needs and include Nationally Safeguarded Single User sites and Regionally Important sites. These are reserved for specialist users and as such are not part of the general marketable industrial land supply.

e) **Developed, Dezoned and Potential Sites:** Categories 11, 12, 13.

Category 11 records industry and business sites developed for industry or business purposes. Category 12 records sites for non- industrial/business purposes including retail/commercial or housing use. Category 13 records sites which are no longer identified within the industry and business land supply.

f) **Potential Sites;** Categories 14, 15.

These categories contain sites with industrial development potential.

Appendix C Clydeplan Authorities Assessors data analysis on industry and business property within their area

Caveats on Use of Assessors Data:

- There are 20 different classifications of property used by the Assessors.
- For the purposes of Industrial and Business Monitoring the key Classes are Office and Industrial.
- Most of these Classes are further broken down into more detailed Assessors Descriptions.
- For "Industrial Subjects" there are 19 detailed descriptions of which the entries above are the main categories.
- Floorspace: Not all subjects have attributed floorspace - e.g. yards tend to be sites and these are not measured, although buildings on site usually are.
- Also note that some entries have no floorspace details provided.
- Vacancy: Caution should be taken with regard to the Assessors understanding of Vacancy.
- In many cases if Rates are being paid then the buildings /subjects are regarded as being occupied even if they area not.
- Missing Records: It should also be noted that in certain circumstances vacant properties which have never been occupied do not appear as Assessors Records.
- Note that data is for the entire Local Authority area

East Renfrewshire Subjects with Floorspace Entry (March 30, 2012)

Industry	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
FACTORY	18	62,486	3	32,930	16.7%	52.7%
STORE	97	55,126	39	31,563	40.2%	57.3%
WAREHOUSE	7	26,223	2	10,496	28.6%	40.0%
WORKSHOP	140	39,855	18	4,087	12.9%	10.3%
YARD	16	825	5	46	31.3%	5.6%
OTHER	61	24,642	5	363	8.2%	1.5%
Grand Total	339	209,157	72	79,485	21.2%	38.0%

Office	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
OFFICE	210	19,901	41	1,778	19.5%	8.9%
Grand Total	210	19,901	41	1,778	19.5%	8.9%

East Dunbartonshire Subjects with Floorspace Entry (October 2013)

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
Industrial	544	403,274	63	35,538	11.6%	8.8%
Factory	27	93,509	2	7,065	7.4%	7.5%
Store	143	37,750	24	4,240	16.8%	11.2%
Warehouse	18	19,021	1	951	5.6%	4.9%
Workshop	257	125,701	23	8,973	8.9%	7.1%
Yard	35	52,693	8	13,147	22.8%	24.9%
Other	64	74,600	5	1,162	7.8%	1.5%
Office (exc Banks)	601	78,253	76	13,197	12.6%	16.8%
Total Business	1,145	481,527	139	48,735	12.1%	10.1%

Glasgow Subjects with Floorspace Entry (March 2014)

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
Industrial	4,008	3,089,050	965	494,409	24.1%	16.0%
Factory	198	868,100	29	52,516	14.6%	6.0%
Store	1413	296,570	430	177,142	30.4%	59.7%
Warehouse	617	1,038,947	114	121,252	18.5%	11.7%
Workshop	1619	710,982	350	95,245	21.6%	13.4%
Yard	161	174,451	42	48,254	26.1%	27.7%
Other						
Office (exc Banks)	6575	2,543,641	1554	518,560	23.6%	20.4%
Total Business	10,583	5,632,691	2519	1,012,970	23.8%	18.0%

Inverclyde Subjects with Floorspace Entry (March 2013)

Assessors Class	Units	Floorspace	Yard Area	Vacant Units	Vacant Floorspace	Vacant Yard Area	% Vacant Units	% Vacant Floorspace	% Vacant Yard Area
Industrial	458	286,082	294,485	108	120,503	59,085	19.10 %	29.60%	16.70 %
Factory	32	88,387	0	8	80,347	0	20.00 %	47.60%	0.00%
Store	82	33,618	803	12	4,320	0	12.80 %	11.40%	0.00%
Warehouse	12	21,617	823	2	4,043	0	14.30 %	15.80%	0.00%
Workshop	220	96,365	6,891	47	20,078	550	17.60 %	17.20%	7.40%
Yard	18	1,109	53,557	4	0	2,885	18.20 %	0.00%	5.10%
Other	94	44,986	232,411	35	11,715	55,650	27.10 %	20.70%	19.30 %
Office (exc Banks)	297	112,118	0	45	5,152	5,795	13.20 %	4.40%	
Total Business	755	398,200	294,485	153	125,655	64,880	16.90 %	34.00%	16.70 %

Note: 48 office and 20 industrial subjects have no floorspace figures provided by the Assessors.
Data Run 24/9/2013

North Lanarkshire Subjects with Floorspace Entry (March 2013)

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
Industrial	2,695	2,391,590	369	263,508	13.7%	11.0%
Factory	238	706,429	25	28,894	10.5%	4.1%
Store	645	289,583	115	36,991	17.8%	12.8%
Warehouse	299	233,070	46	154,839	15.4%	66.4%
Workshop	1093	437,397	145	38,524	13.3%	8.8%
Yard	281	44,409	35	3,995	12.5%	9.0%
Other	139	680,702	3	265	2.2%	0.0%
Office (exc Banks)	1709	99,131	365	61,701	21.4%	62.2%
Total Business	4,404	2,490,722	734	325,209	16.7%	13.1%

Note: 22 office and 190 industrial subjects have no floorspace figures provided by the Assessors.
Data Run 6/3/2013

**Renfrewshire Industrial and Office unit Floorspace
entry (March 2013)**

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
Industrial	1,531	1,787,084	259	247,853	17.0%	14.0%
Factory	116	777,086	16	71,760	14.0%	9.0%
Store	366	185,106	71	53,871	19.0%	29.0%
Warehouse	138	350,806	24	47,689	17.0%	14.0%
Workshop	735	400,254	116	60,296	15.0%	15.0%
Yard	97	9,005	26	1,023	27.0%	11.0%
Other	79	64,827	6	13,212	8.0%	20.0%
Office (exc Banks)	1,065	211,984	280	57,224	26.0%	27.0%
Total Business	2,596	1,999,068	539	305,077	21.0%	15.0%
		Total Yard Space		Vacant Yard Space		% Vacant
		723,079		115,201		16.0%

Note: 13 office and 24 industrial records have no floorspace figures provided by the Assessors.
All properties within Glasgow Airport Campus (154 records identified as offices, 9193 sqm) have been removed from the study

South Lanarkshire subjects with floor space entry 2013

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	% Vacant Units	% Vacant Floorspace
Industrial	2,235	1,959,938	290	152,303	13.0%	7.8%
Factory	270	791,448	27	47,728	10.0%	6.0%
Store	638	236,252	112	26,392	17.6%	11.2%
Warehouse	167	385,288	18	44,420	10.7%	11.5%
Workshop	997	368,973	125	32,092	12.5%	8.7%
Yard	99	15,744	3	130	3.0%	0.8%
Other	64	162,233	5	1,541	7.8%	0.9%
Office (exc Banks)	1589	327,477	397	40,696	25.0%	12.4%
Total Business	3,824	2,287,415	687	192,999	18.0%	8.4%

West Dunbartonshire Subjects with Floorspace Entry (April 2013)

Assessors Class	Units	Floorspace	Vacant Units	Vacant Floorspace	%Vacant Units	%Vacant Floorspace
INDUSTRIAL	1434	1,249,323	136	140,901	9.5	11.0
Factory	106	361,020	8	19,250	7.5	5.3
Store/s	328	171,809	44	27,703	13.4	16.1
Warehouse	72	79,312	2	1,442	2.7	1.8
Workshop	515	191,539	32	8,214	6.2	4.3
Yard	106	148,266	16	24,355	15.0	16.4
Garage	96	67,945	2	672	2.0	1.0
Other	211	229,432	32	59,265	15.2	25.0
OFFICE	835	157674	193	23434	23%	15%
Total Business	2269	1,406,997	329	200166	14.5	14.2

Appendix D SEIL Proformas²⁵

As part of the process the SDP team, in conjunction with its constituent Authorities, produced a suite of documents to provide an overview of the Strategic Economic Investment Locations (SEILs) across the city region and set out the key characteristics and information on each of them in order to provide a stronger evidence base for strategic decisions and monitoring purposes.

The evidence underpinning this work has been provided by each of the respective Local Authorities and be augmented with inputs from Scottish Enterprise and the commercial sector. This aimed to provide a baseline position for our refreshed monitoring purposes.

The Proformas contain a range of information including:

- Local Authority within which the site is located
- SEIL's strengths
- Site history
- Site address
- Site reference number
- Total Gross area
- Ownership (if known)
- Status of the site, i.e.:
- SDP level/LDP level (in which land supply)
- In a geographical area for a particular land use
- Planning Permission Status: PPP or Full
- Current Uses Classes on site
- What sectors have been designated for this location?
- Availability, i.e.:
 - Site is not likely to be developed, site preparation is required;
 - Site is likely to be available; preparation commenced, or preparation programmed with funding in place;
 - Site is marketed.
- Any relevant additional information on the SEIL
- Existing Designated sectors
- Connectivity analysis for the SEIL

The Proformas also contain analysis undertaken on the SEILs.

²⁵ Additional Supporting material for Background Report 6 document – www.clydeplan-sdpa.gov.uk/proposedplan2016



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