

Glasgow and the Clyde Valley Strategic Development Plan

Proposed Plan

Background Report 05

Strategic Economic Investment Locations

June 2011

05



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APPENDICE

Definition of Marketable Land

Definition of Quality Land

The Role and Function of the Proposed Strategic Economic Investment Locations within the SDP proposed by Local Authorities

Criteria Spreadsheet Data – Basic Data, Accessibility Scores, Role and Function Criteria inc SE's View on Key Sector priority, Relationship to OE's Growth Sectors.

1. Introduction

The purpose of this Background Paper is to advise on how support will be given in the Strategic Development Plan for a rebalanced low carbon economy for the city-region. The Strategic Development Plans focus will support key existing and new economic sectors. This Background Paper will show how the Strategic Development Plan identifies a priority set of locations, Strategic Economic Investment Locations (SEILs), based upon their ability to offer specific roles and functions within the new rebalanced low carbon economy. The Report also identifies Strategic Freight Hubs.

It is proposed that the primary SEIL is Glasgow City Centre and its surrounding areas with their employment districts, University campuses, related research and development, cultural quarters, and emerging new green technology focus. The City Centres 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 have been selected to support the Scottish Government's key sectors, Scottish Enterprise locational priorities and the growth in the rebalancing low carbon economic sectors. As strategic priorities, they best reflect the need for sustainable locations to address long-term drivers of change. 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 strategy of the Strategic Development Plan requires to focus 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 Agenda for Sustained Growth in the 2006 Alteration to the Structure Plan sought to achieve a positive step change in the metropolitan area's economic performance. The current uncertain economic circumstances allowed the opportunity for a critical evaluation of the strategic growth perspective and the implications for industry, business and office land designations in the Strategic Development Plan. This Report looks at the potential economic and demographic futures outlined by Oxford Economics in Background Paper 1 and looks at the implications of these economic changes on the sectorial industrial balance and future jobs.

This Background Report focuses firstly upon the strategic future of the Competitive Economic Framework and the Strategic Economic Locations in Glasgow and the Clyde Valley, as part of the Strategic Development Plan process. The Report examines critically and focuses on the Strategic Industrial and Business Locations (SIBLs), former Safeguarded High Amenity Locations and any new emerging economic locations of in terms of their strategic roles and functions.

The Report examines the inherited Structure Plan policy on economic competitiveness sought to accommodate an increased rate of economic development and set out the Competitive Economic Framework of strategic economic development opportunities in order to achieve this growth.

The Report critically examined the existing Structure Plan assumptions in relation to industry, business and office policy. This allowed a fundamental reassessment of the

policies contained in the current Structure Plan, assess what was strategically important and of crucial importance allow an assessment if the designations were still relevant. The challenge was how to make the industry, business and office location preferences, clearer and more focused for inclusion into the new Strategic Development Plan.

In response to the major issue in the Issues Paper of “Should any of the existing Strategic Economic Locations no longer be considered strategic? The consensus from stakeholders was that the number of locations to be included in the SDP should be substantially reduced. The Report will outline the terms of the assessment process and how a series of criteria was set in order to assist in assessing “what is strategic”. The identified strategic economic locations were derived from analysis and a strategic assessment of each locations wider roles and functions. This analysis was high level and comparative and required often the exercise of subjective professional judgement.

The Report will explain how with the assistance of the Topic Group the task of assessing and rationalizing the Strategic Economic Locations focusing on the Strategic Industry and Business Locations, Safeguarded High Amenity Locations and any new potential strategic location was undertaken. The Report will recommend a list of Strategic Economic Investment Locations (SEILs) for inclusion in the Strategic Development Plan within the context of a network of strategic economic investment locations which are either to be safeguarded from non industrial or business used or are opportunity locations for future development.

The Report will show the analysis of the existing strategic economic locations which were taken forward into three scenarios:

Preferred List:- High level locations which support by role and function the Key Sectors and Growth Sectors. A focus on the network of strategic economic locations either to be safeguarded or which were opportunity locations based strictly upon strategic role and function. This option proposes identifying those locations which exhibit strategic role and function characteristics by their contribution to – the Governments Key Sectors, Scottish Enterprise’s Key Sectoral Locational Priorities, the promotion of the growth sectors identified in Oxford Economics Report. Refining the opportunity locations by a risk analysis based on the locations “Fit with Strategy” and on the barriers, uncertainties and timescale for delivery. This was the preferred option.

Alternative 1 - Continue to safeguard all the current Structure Plan Strategic Economic Locations. This option was seen as the least sustainable option in terms of centralisation and accessibility and diluted the strategic importance of key locations in terms of role and function. This was the least preferred option.

Alternative 2 - Strategic Safeguarded Locations which support Key Sectors and Growth Sectors plus “longer list” of Opportunity Locations. This option included all the Safeguarded Locations plus all the opportunity locations that were the subject of a risk analysis. This option included opportunity locations which may not promote key sectors, may be poorly accessible and may have uncertainties as to if and when they would be delivered. This was the second preferred option.

Finally the Report will provide the preferred option of a final schedule of high level locations which support, by role and function, the key growth sectors for a rebalanced low carbon economy. The Report will also provide a schedule of Strategic Freight Hubs.

2. Policy Context

2.1 Governments Economic Strategy

Higher sustainable economic growth is the key priority and the approach to achieving that is set out the Government Economic Strategy (GES).

The Scottish Government has set the following economic targets:

- to raise Scotland's GDP growth rate to the UK level by 2011;
- to match the growth rate of the small independent EU countries by 2017; and
- to match average European (EU-15) population growth over the period from 2007 to 2017.

The Government wants Scotland to be the best place in Europe to do business.

The Government published in December 2010 "A Low Carbon Economic Strategy for Scotland" and identifies the potential for an additional 60,000 new jobs to be generated in Scotland by 2020 associated with a rebalanced economy focusing on the "green" low-carbon economy. A shift in focus in part away from reliance on the service economy and in particular Business and Financial Sector and towards a growth in specialist high-value products and related services associated with "green technology" sectors, "green environmental" sectors, tourism and leisure sectors. The rebalanced low carbon economy is the approach adopted in the SDP.

2.2 National Planning Framework

The National Planning Framework (NPF) guides the spatial development of Scotland to 2025, setting out a vision of Scotland in which other plans and programmes can share and to which they can contribute.

The second Framework - NPF 2 - for Scotland sets out in broad terms how development and land use could and should be occur up to 2030.

The Planning etc. (Scotland) Act 2006 puts the NPF on a statutory footing. NPF 2 advises the key aims of the strategy for Scotland's spatial development to 2030 are:

- to contribute to a wealthier and fairer Scotland by supporting sustainable economic growth and improved competitiveness and connectivity;
- to promote a greener Scotland by contributing to the achievement of climate change targets and protecting and enhancing the quality of the natural and built environments;
- to help build safer, stronger and healthier communities, by promoting improved opportunities and a better quality of life; and

- to contribute to a smarter Scotland by supporting the development of the knowledge economy.

NPF 2 advises specifically in relation to industry and business that while there is generally an adequate supply of land for business and industrial development across Scotland, development plans must ensure that an effective supply of good quality serviced sites is maintained in the right locations to meet demand.

NPF 2 also advises that the sites safeguarded for high amenity use are considered to be sufficient to meet potential requirements.

Knowledge economy businesses generally need less space and land than the older industries. Many office-based activities are compatible with residential and other uses and therefore relatively easy to integrate into mixed use developments within the existing urban fabric.

Against that background, the redevelopment of urban areas is likely to create opportunities for the reallocation of some of the current industrial land supply for housing and other uses.

Further information about the NPF and NPF 2 can be found at www.scotland.gov.uk/Topics/Built-Environment/planning/National-Planning-Policy/themes/npf

2.3 Scottish Enterprise

Scottish Enterprise has been refocused to support key industries and provide a more streamlined service for the business community.

The aim is to create a knowledge-driven economy capable of meeting the challenges of a highly competitive global environment. Progress towards a more competitive position will be based on a skilled workforce, creativity and enterprise and the transfer of knowledge into the market place.

Scotland's universities, higher education institutions and further education colleges lie at the core of the strategy for developing the skills base necessary to support a knowledge driven economy.

Scottish Enterprise is also now focusing on metropolitan regions, undertaking collaborative strategy development at the regional level.

Scottish Enterprise are a major partner and stakeholder in the process of establishing the SDP's view on industry and business locations and their views on priority key industries will be a major consideration in helping to focus on the strategic locations to be safeguarded or developed as opportunity locations. Scottish Enterprise's input to the assessment process is described further in Chapter 4.

2.4 Scottish Planning Policy

Consolidated Scottish Planning Policy

The Scottish Government has rationalised national planning policy by replacing the previous series of SPPs and NPPGs with a single SPP document.

The consolidated SPP published in February 2010 provides a shorter, clearer and more focused statement of national planning policy.

Subject policies that are covered in the consolidated SPP include Economic Development (paragraphs 45 to 51) and it would appear that the policy advice has not materially changed from Scottish Planning Policy (SPP) 2 Economic Development published by Scottish Executive in November 2002.

The consolidated SPP states that:

“Planning authorities should ensure that there is a choice of suitable marketable sites and locations for business allocated in development plans, including opportunities for mixed development, to meet anticipated requirements and a variety of size and quality requirements”

This SPP focuses on five themes where planning can contribute to economic development:

- Taking account of the economic benefits of the proposed development in development plans.
- Promoting development in sustainable locations, particularly in terms of accessibility.
- Promoting regeneration and the full and appropriate use of land, buildings and infrastructure.
- Supporting development which will provide new employment opportunities and enhance local competitiveness and
- Promoting the integration of employment generation opportunities with supporting infrastructure and housing development.

The SPP advises that new sites should be brought forward where existing allocations do not meet current or anticipated market expectations. Allocated sites are to be regularly reviewed taking their marketability into account. And where locations are no longer appropriate, the sites should be reallocated and redeveloped for other uses through the development plan.

The specific needs of different businesses should be taken into account including the importance of access to strategic road and rail networks.

Under the heading of Strategic Business Locations, Strategic Development Plans are advised **to identify an appropriate range of strategic business locations** such as mixed developments, business parks, science parks, medium and large industrial sites and high amenity business locations.

Strategic sites for business use which are high amenity and accessible by all forms of transport should be identified in Strategic Development Plans and protected from inappropriate uses and development.

Crucially the advice on single user high amenity sites is clarified in that the Scottish Government no longer considers it necessary to identify and safeguard these locations and should be considered by planning authorities if they are required for future strategic use.

Copies of the consolidated SPP is available at
www.scotland.gov.uk/resources/doc/47007/0026443.pdf

2.5 Glasgow and the Clyde Valley Joint Structure Plan

The Structure Plan set out a long-term Metropolitan Development Strategy for Glasgow and the Clyde Valley to 2025 by identifying its development requirements and settlement strategy for the area and identifying priorities for urban and rural regeneration.

In addition, the Structure Plan set out an Agenda for Sustained Growth as the basis for a twenty-year planning and development strategy for Glasgow and the Clyde Valley. It was based upon a Vision which would contribute to the renaissance of Scotland by providing a framework for growth and regeneration based upon care for the environment.

The key elements of this plan were in the following areas:

- Glasgow City Centre – the central focus of the metropolitan economy
- Clyde Waterfront - renewing and regenerating the core urban river corridor
- Clyde 'Gateway' - the restructuring of eastern Glasgow and parts of western South Lanarkshire
- Ravenscraig - the restructuring of the central North Lanarkshire conurbation
- Glasgow International Airport – the international gateway to the west and to the metropolitan business and visitor economy.
- Community Growth Areas (CGAs) - catering for long-term metropolitan expansion, 13 locations accommodating approximately 19,000 houses
- GCV 'Green Network' (and Central Scotland 'Green Network') - a positive action multi-objective laden economic 'place-setting'; and, environmental recovery project.

The approach to land for business and industry in the Structure Plan was based around improving the attractiveness of the area for investment and in identifying a framework of development opportunities which meet the needs of new and expanding businesses.

The strategy was intended to be responsive to economic uncertainties and demands through a framework of competitive economic locations which were significant in scale and accessible to all parts of the labour market, and was not dependent on car usage.

Increasing the rate of economic development was a key priority for achieving one of the strategic aims to improve economic competitiveness.

The Structure Plan sought to achieve this aim, by setting out a Competitive Economic Framework of development opportunities by which this growth would be achieved, including:

- accommodating new and expanding businesses in locations which have the potential to be closely integrated into the public transport system, and the network of town centres, and which are well related to areas of employment need; and
- the creation of a competitive place by enhancing the environment and developing better international links.

The Structure Plan sought to improve economic competitiveness through Strategic Policy 5 Competitive Economic Framework which supports:

- the development, safeguarding from inappropriate uses and enhancement of Strategic Economic Locations for industrial and business use. These Strategic Economic Locations consist of Strategic Business Centres (SBCs), Strategic Industry and Business Locations (SIBLs); Core Economic Development Areas (CEDAs) and Safeguarded High Amenity Locations (SHALs);
- maintaining a minimum 10 year potentially marketable and serviceable land supply; and
- promoting the economic role of the other key assets - Tourism Development Areas, International Transport Facilities and University Campuses.

The Structure Plan set out the spatial framework that local planning authorities and other agencies should follow in order to accommodate the scale and type of business facilities needed to achieve a sustainable economy. The Structure Plan sought a supply of land for employment use that was of sufficient quality and quantity to support economic growth and the supply must also reflect the implications of creating a more productive economy. The lack of basic skills and qualifications was identified as a barrier to the regional economy.

The Glasgow and the Clyde Valley Joint Structure Plan is available at www.gcvsdpa.gov.uk/structure_plan/structureplan2006.htm

Strategic Policy 5 Competitive Economic Framework

Strategic Economic Locations

The 2006 Structure Plan Alteration - Strategic Policy 5 identifies **66 locations** as Strategic Economic Locations, Schedules 5(a) - 5(d) (refer Annex A) to be protected and developed.

The framework for Strategic Economic Locations includes:

- **9 Strategic Business Centres (SBCs)** - service industries are dependent upon an effective network of SBCs for the development of office, education, tourism and culture orientated economic facilities

Figure 1 Strategic Business Centres

Schedule 5(a) Strategic Business Centres	
Glasgow City Centre	Greenock
Clydebank	Hamilton
Cumbernauld	Motherwell
Dumbarton	Paisley
East Kilbride	

- **40 Strategic Industrial and Business Locations (SIBLs)** - the most marketable strategic industrial and business locations are safeguarded as SIBLs and are given priority in terms of industrial, business, infrastructure and ancillary use investment

Figure 2 Strategic Industry and Business Locations

Schedule 5(b) Strategic Industrial and Business Locations
Barrhead
Blantyre/Whistleberry
Cambuslang
Cartsburn

Clyde Gateway
Clydebank Riverside
City Science/College Business park
Clydebank Business Park
Cumbernauld North West
Darnley Mains
East Kilbride South and West
Erskine Riverfront
Faulds Park
Gartcosh
Glasgow Business Park
Greenock/Port Glasgow (Riverside)
Hillington/Cardonald
Inchinnan
Former Lanarkshire Enterprise Zone sites of Airbles, Calder, Dunalistair, Excelsior Park, Mossend, Shawhead and Tannochside.
Larkhall South
Linwood
Newhouse and Newhouse West/Eurocentral
Pacific Quay
Queenslie
Ravensraig
Righead/Bellshill/Strathclyde Business Park
Robroyston
Vale of Leven Industrial Estate
West of Scotland Science Park
Westerhill
Westway, Renfrew

- **13 Core Economic Development Areas (CEDAs)** - new development was to be promoted in these areas in order to achieve a higher rate of economic activity and to provide brownfield development opportunities which were better related to the workforce and the public transport system, reducing the trend of firms moving from core to peripheral areas. (Some locations were both SIBLs and CEDAs)

Figure 3 Core Economic Development Areas

Schedule 5(c) Core Economic Development Areas
Clyde Waterfront
Clydebank Waterfront
Dumbarton
Govan
Inverclyde Waterfront
North Clyde
Renfrew
Clyde Gateway
Glasgow East End
Canbuslang/Rutherglen
Ravenscraig/Motherwell/Wishaw
Ravenscraig
Airdrie/Coatbridge
Gartcosh
Glasgow North
Paisley North

- **9 Safeguarded High Amenity Locations** - SPP 2 required that specific locations were identified and safeguarded as National High Amenity Sites and a number of regionally significant high amenity locations were also identified. The consolidated SPP now advises that there no longer requires the 5 Single User High Amenity sites be safeguarded.

Other key assets

The Structure Plan also identified a further **22 locations** which promote the role of other key assets listed in Schedules 5(e) - 5(g).

These other key asset locations include:

- **10 Tourism Development Areas** - tourist related development which support the strategy were also identified.
- **8 International Transport Facilities** - economic competitiveness depends on the effectiveness of the international transport network of airports, docks, rail freight facilities and road links.

- **4 University Campuses** - the higher rates of economic development will be driven by the knowledge economy. The economic role of the four universities was therefore recognized.

Maintaining a 10-year supply

In addition to the Competitive Economic Framework the Structure Plan also sought to ensure that the quantity, quality and distribution of the available industrial and business land continued to meet the level of demand for all types of industrial and business proposals that emerge.

The Structure Plan required a ten-year supply of marketable and serviceable land for business and industry, including a five year supply of readily available marketable sites. Marketable sites were those categorized as Confirmed Marketable, Potential Marketable and Marketable Sites in Rural Investment Areas.

Monitoring of Industrial and Business Land

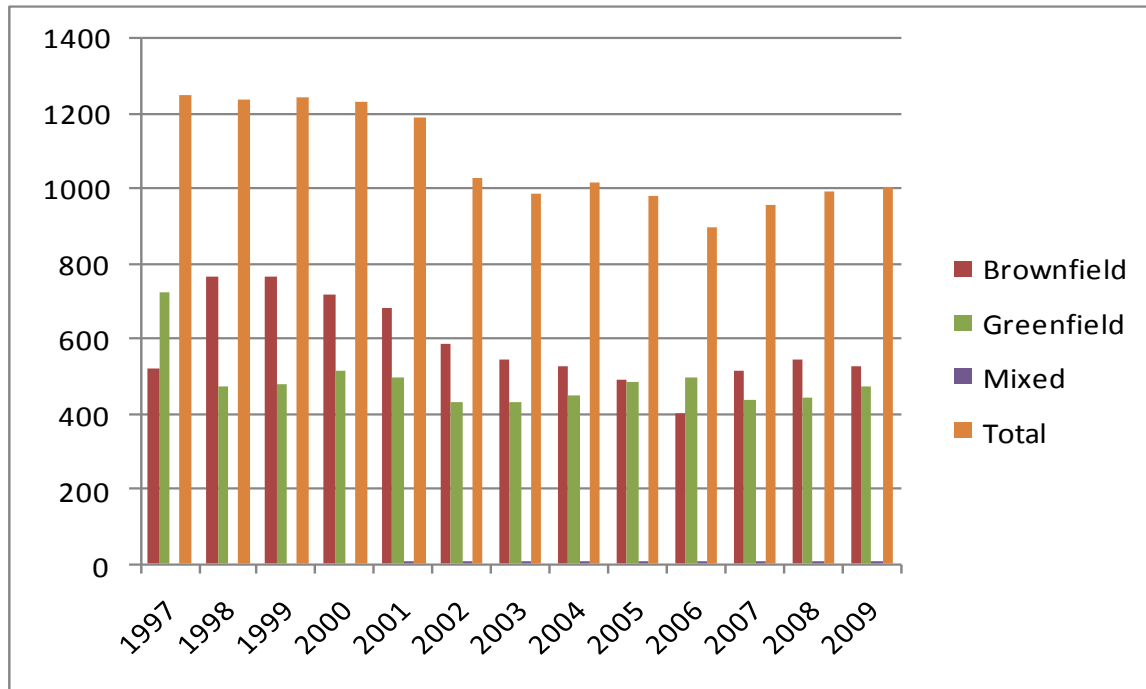
Past trends in take-up of land identified through monitoring were used as the basis for likely future development, integrated with a target of providing additional land in core economic development areas.

The Industry and Business Monitoring Survey was undertaken annually with a base date of 31 March. The survey required that each local authority monitored 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 Core Economic Development Areas (CEDAs) and Strategic Industrial and Business Locations (SIBLs);
- the level of take-up overall and within CEDAs and SIBLs;
- the level of quality supply and potential quality supply by local authority area; and
- a comparison of land supply and the 10-years demand for marketable land.

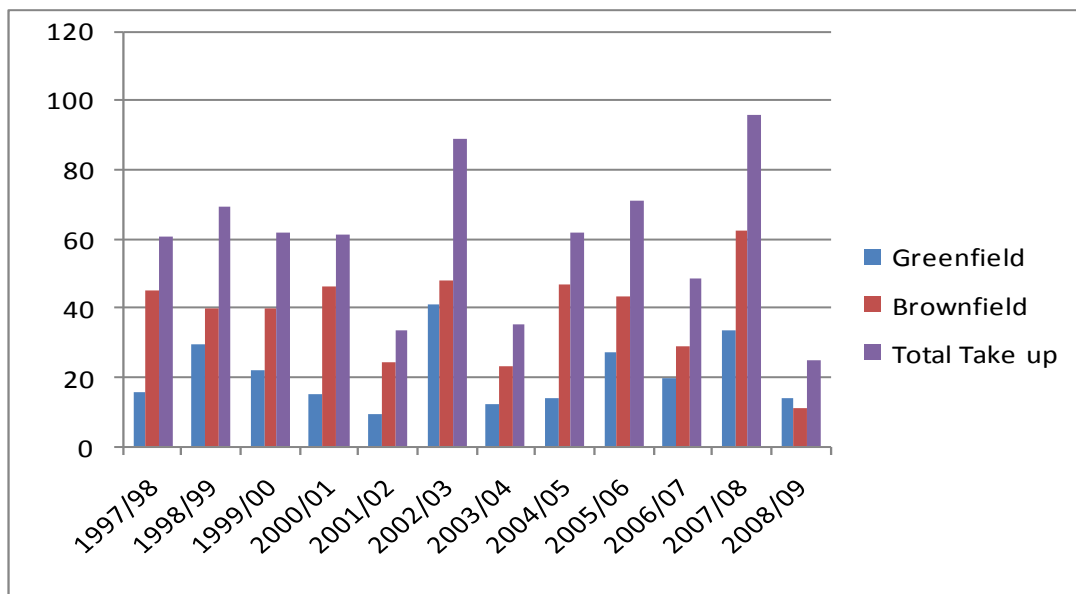
Key monitoring findings

Figure 4 Marketable Land 1997 - 2009



- Between 1997 and 2006 marketable land supply steadily fell by 350ha or 28%. However, between 2007 and 2009 this trend reversed with an overall increase of 105 ha or 10.3% of overall marketable land. There are currently a healthy 1003 ha of marketable land supply available.

Figure 5 Take Up of Land for Business and Industry 1997 - 2009



The average take-up over the past 10 years was 58.2 ha per year. 77.8% of all marketable land supply was defined as quality, while 15.2% was potential quality. Up to 80% of all marketable land was concentrated in SIBLs and CEDAs locations which were the most competitive locations in the plan area. There is currently 16.6 years supply of marketable land supply

Further information on key monitoring statistics and trends is available from www.gcvspda.gov.uk/industry

2.6 Oxford Economics – Economic Outlook Advice

In late 2009, Oxford Economic produced a short ‘think-piece’ which assessed the strategic and economic implications of the recession on the Scotland economy. Based on the findings of this report, the GCVSDPA came to the view that the recovery was likely to be slow with muted net migration into the region in the medium term. Furthermore, it was concluded that there would be a significant time lag between the current post recession position of the region and achieving the sustained growth levels of the scenario developed in 2005. As such, the Authority commissioned Oxford Economics to revisit the previous work assessing in more detail the implications of this on the Glasgow Clyde Valley City Region.

Population projections underpin employment growth and GDV assumptions and forecasts. Population forecasts for Clyde Valley from the Oxford Economic baseline scenario suggested a return to modest migration falls in the near term, increasing in the longer term as natural increase becomes a drag on population (due to demographic change). This estimate was below official projections which suggest sustained growth in population out to beyond 2020 before a reversal into decline. In practice the differences in numbers terms are modest, -26,800 people in 2020 (-1.5%) and -17,000 people in 2035 (-1%) but they are very different in terms of overall direction. The outlook was more modest in Oxford Economics Baseline Scenario for the reasons discussed above, namely a weaker economy adversely impacting on migration patterns. The GCVSDPA felt that this may prove too pessimistic an outlook (though it remains well within historic trends) and thus an upper migration scenario was also considered.

In light of the uncertainty surrounding long-term economic forecasts, and given the variations in net migration in the various demographic forecasts a number of alternative scenarios was considered by Oxford Economics.

Oxford Economics advised that as all forecasts suffer from uncertainty, more so currently in light of the fragile state of the UK economy, considering alternate scenarios for future growth would be a sensible approach. The possibilities for a re-balanced UK economy and a more positive migration pattern into Glasgow / Clyde Valley were two other scenarios considered. (See Background Papers No 01 and No 07).

Three scenarios were considered by Oxford Economics (OE):

- **A re-balanced economy**, where the UK and its regional governments foster a change in the balance of the metropolitan economies away from the services sector emphasis by identifying and building upon other growth areas - high-tech high value manufacturing, environmental industries and services, tourism and related leisure, film and culture sectors;

- **Alternate house price assumptions**, where the price differential between Scotland and the GCV area as against southern England remains in place, as is the historic norm. Whilst in theory this differential should favour in-migration to GCV, it does not necessarily bring economic growth and can also be equated with higher unemployment levels, vacant property and heightened reliance upon the social rented housing sector;
- **Alternate migration outcomes**, where net migration runs at a rate above baseline projection driven by quality of life and house price differentials. This scenario, in total demographic change terms, models very closely to the primary demographic scenario in the Authority's HNDA,(Scenario C) although the balance between in-migration and natural change is markedly different between the two scenarios. The OE economic scenario with lower natural change and higher economically driven net in-migration, whilst the HNDA scenario C has an opposite balance between the two components with a much higher natural change component. However as in the House Price differential scenario above, population growth does not guarantee economic growth and this scenario has the potential to draw in population but without the economy to support it, thus throwing even greater stress on the social-rented housing sector.

The Oxford Economics advised that the baseline scenario remained the most likely economic forecast for the first half of the plan period as it is widely anticipated that it would be up to or beyond a decade before economic and associated employment growth returns to pre-2008 levels.

The details of the overall Employment Forecasts, Employment Forecasts by Sectors, Forecast Change by Sector and GVA projections will be discussed further in Chapter 3 of this Report. Crucially Oxford Economics advised on the potential growth sectors and which ones would be anticipated to grow under each scenario. These growth sectors were therefore one of the major criteria for rationalizing Strategic Economic Locations and establishing locations as SEILs.

2.7 Recession and downturn.

Oxford Economics advise that “tomorrow will not be like yesterday”. They went on to advise that:

- The economic outlook remained very uncertain. The pressures on consumers and the government are weighing heavily on overall prospects and offsetting any improvement in the corporate sector.
- The economic recovery will depend on the strength of the exports sector and while services are likely to be the mainstay of such growth the possibilities in other sectors should not be discounted given the fright with the global recession gave to the global financial industry.
- For the Glasgow Clyde Valley economy the recession has taken a significant toll, broadly proportionate to what has occurred elsewhere in the UK, and the road to recovery looks both perilous and long.

- Base projections suggest it will be perhaps a decade before employment levels return to their peak and also suggest a return to modest population decline as migration responds to the weakening conditions.
- Over the course of the slow recovery decade (2010-2020) growth is projected at a relatively modest (in the context of the decade just past) 3,250 net jobs per annum and 2.4% GVA growth for Glasgow / Clyde Valley before moderating to an annual average 1,500 jobs per annum and 1.9% growth in the period 2020-2035.
- The likelihood of a faster growth may be modest but it is well within the realms of possibility. In practice it would require the Glasgow Clyde Valley region to attract a greater share of world demand in a range of exporting sectors, or offer housing quality and living standards which make the area relatively more attractive than other locations and thus economic activity is displaced to Glasgow Clyde Valley. In addition it remains the possibility that the UK recession has been overstated, if it has not then firms appear to have held onto labour at the expense of productivity levels. This means that during recovery they will not need to recruit significantly and hence job growth will be sluggish.
- Recovery from recession will be slow. For Glasgow and Clyde Valley economic prospects will be more muted than they were pre recession, all eyes are on export potential and pressures on consumer incomes and on public sector jobs will make the decade ahead feel very different to the decade past.
- That said the outlooks remain broadly positive for urban locations with a predominance of service sector jobs likely over the medium term and in this regard Glasgow Clyde Valley's prospects remain more positive than studying current conditions might lead one to conclude.

2.8 Oxford Economics advised on issues to be considered in future strategic planning and policy.

- **Flexibility required:** The planning process necessarily needs some certainty and precision over future land zoning, location and scale. Where possible flexibility needs to be accommodated into the process given the huge uncertainties over the future trends economically and demographically.
- **Complementarities with economic strategy:** The analysis clearly shows the role that the economy has in migration and demographic trends. This means a strong read across between the economic strategy (and any transportation elements within) and the planning strategy. This is particularly important when considering the types of jobs likely to be created and their potential location
- **Environmental and transportation issues:** The likely real cost rise in transportation as a result of rising environmental taxes, energy prices and possible tax raising approach (at national and local level) means that the need to reduce travel distance and time will be crucial in terms of spatial location of jobs and people. Land adjacent to major public transportation networks (most notably railway stations) could become extremely valuable and desirable in the medium term.

- **The wealth effects:** If migration continues in absence of economic prosperity then the demand for housing will be at the social / supported end of the market. The higher migration scenarios (including the HNDA Scenario C) will require either Glasgow Clyde Valley to attract a large share of UK / international markets in exporting activities or the region will suffer rising unemployment and workless households.
- **Creative policy tools:** It will be important to consider the use of taxation and incentives to encourage 'desirable' behaviour in terms of residents and businesses. Some of the powers may not currently exist locally but they may be in future. These include the use of rating policy to ensure quality of property (in terms of visual and environmental / safety aspects) and to limit vacant property. Also the use of charging policies on parking/ access to help direct economic development towards Brownfield and into prime (from a planning and spatial point of view) locations.
- **Urban living facilitation:** Urban living has become more attractive as a result of the move towards graduate hungry service sector jobs (and away from land and capital hungry industrial production) this is likely to continue into the medium term. However the single style provision of city centre apartments may need reconsideration and the maintaining of school, entertainment and green space, alongside a range of housing tenures and types in a compact urban environment remains an important consideration going forward.
- **Public finance pressures:** The public finance pressures will exert a range of significant squeezes on public money which may impact on planning policy. For example the need to sell any public land for income may increase as may the desirability to raise revenue through squeezing the planning / building / development process. It is important to attempt to keep economic and planning policy mindful of the economic realities but independent of pressures that may lead to a disjointed economic development patchwork unsuitable for more environmentally cost sensitive high energy cost times which lie ahead
- **'Sweating' assets:** The financial pressures may mean that the short term needs for land are relatively modest and better use of the existing 'estate' will be necessary. 'Sweating' the current assets stock harder may be appropriate but the desire to move to new lower cost (from an energy point of view) premises may lead to a significant recurrence of underutilised assets in the urban centres. Mitigating against such a return of urban blight will be an important strategic concern.
- **The need to re-balance:** whilst some of the talk of the UK economy rebalancing back towards industrial production may be over done (given relative wage costs and other competitiveness issues) the possibility of some on shoring of small scale production and development of new technological sectors (such as green technologies) means that land use will not be exclusively service or office orientated as perhaps was considered pre recession.

3. Employment Structure and Projections

3.1 Oxford Economics - Structure and Forecasts

As part of the MIR process Oxford Economics were commissioned by GCVSDPA to provide employment forecasts and GVA forecasts. It is this data that was the basis of the future employment projection data. The unemployment data was derived from NOMIS. The 2009 labour market information is based on data as of April 2009.

Table 1 shows the Claimant Count which is a series measuring all people claiming Jobseeker's Allowance. It remains the only comprehensive series available at small area level, and is a valuable indicator as it allows direct unemployment comparisons between areas. The financial sector "credit crunch" followed by the economic recession through 2008 and 2009 has undermined the previous optimistic labour market projections which indicated for example a job growth rate projection of 2.3% between 2008 and 2013 and predicted unemployment rates to continue to decline. The full effects of the economic downturn are now being reflected in these latest figures and forecasts which show claimant count rising steeply to 4.7% in April 2009 compared to the previous year's 2.8%.

Table 1 Claimant Count March 31st 2007 – 2009

Authority	2007		2008		2009	
	Total	%	Total	%	Total	%
East Dunbartonshire	994	1.6	881	1.4	1,678	2.7
East Renfrewshire	745	1.4	595	1.1	1,252	2.4
Glasgow City	15,374	4.0	14,374	3.7	21,252	5.4
Inverclyde	2,278	4.5	1,891	3.8	2,572	5.2
North Lanarkshire	5,987	2.9	5,292	2.6	10,547	5.2
Renfrewshire	3,049	2.9	2,654	2.5	4,629	4.4
South Lanarkshire	4,667	2.4	3,899	2.0	8,093	4.2
West Dunbartonshire	2,522	4.4	2,027	3.5	3,391	5.9
Glasgow and Clyde Valley	35,646	3.2	31,613	2.8	53,414	4.7

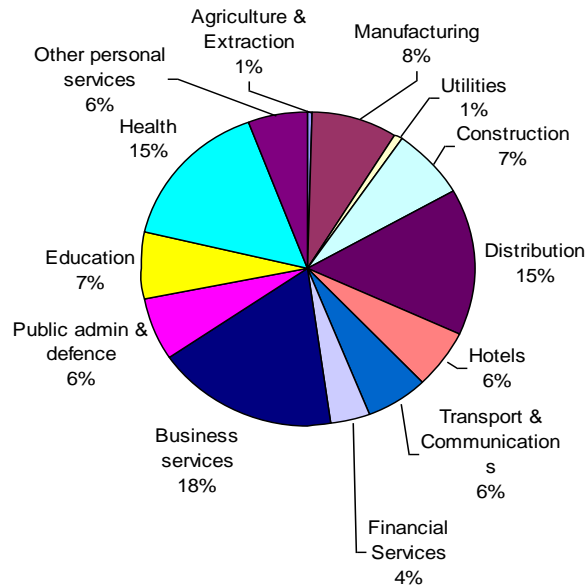
Source NOMIS

3.2 Employment: Current structure

The OE report advises on the current employment structure in GCV area. The latest employment data for Glasgow Clyde Valley is for 2008 and shows that the majority of employment in the area is in business services with 18% of total employment which is to be expected given the urban nature of the area. This is followed by health and distribution employment both with a 15% share of total employment. Despite rapid decline in the 1980s and 1990s the manufacturing sector still holds a significant

proportion of overall employment by urban standards accounting for 8% of total employment.

Figure 6 Total Employment Structure in Glasgow/Clyde Valley, 2008

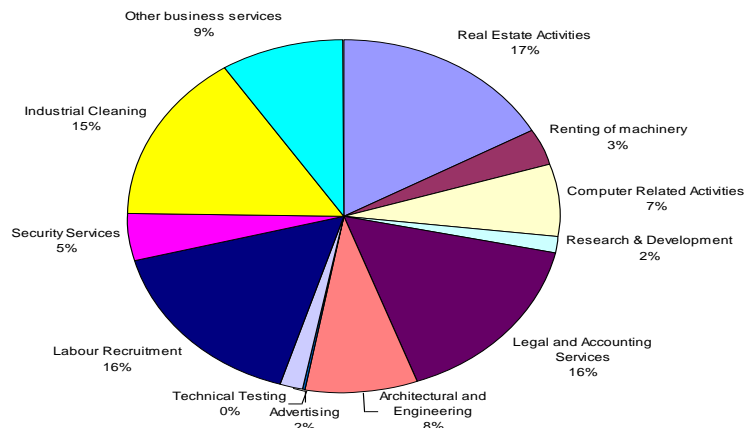


Source: ABI, Oxford Economics

Note: Includes self employed

Within business services, the largest sector is real estate activities with 17% of total employment in 2008 reflecting the significant growth in the housing market. This is followed by legal and accounting services with 16% of total employment. Labour recruitment is also well represented in the region. Industrial cleaning also represents a large share of business services at 15% of total business services.

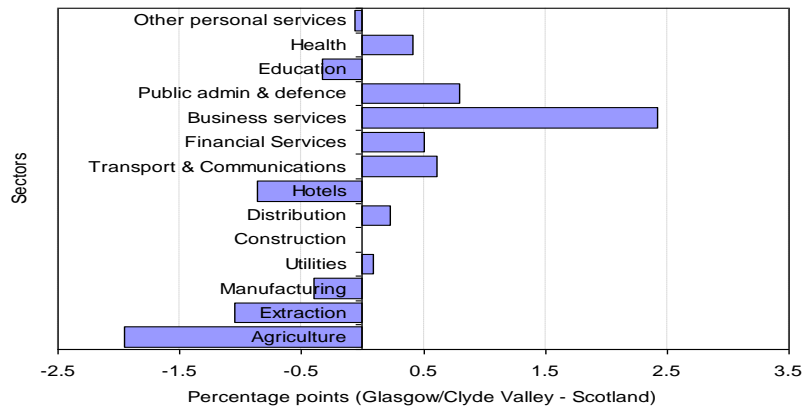
Figure 7 The Structure of Business Services in Glasgow Clyde Valley, 2008



Source: ABI Oxford Economics

Glasgow Clyde Valley area has a much higher concentration of employment in service sector – both private and public services. Business services sector has a percentage share of total employment that is 2.4 percentage points higher than Scotland as a whole. Public administration, transport & communications and health are also major sectors for the region.

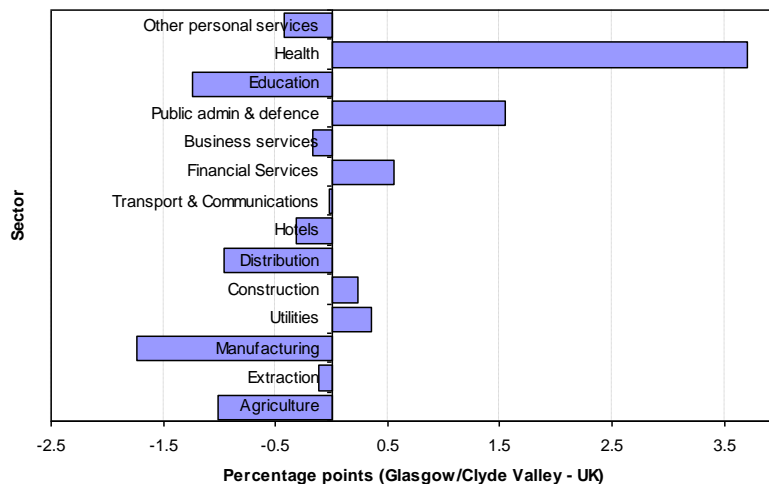
Figure 8 Relative Employment Concentration (2008) - Glasgow/ClydeValley, difference from Scotland



Source: Oxford Economics

The area is much more proficient in health employment and public administration reflecting the nature of public spending in Scotland and the urban structure of Glasgow and Clyde Valley– particularly on health care. Similarly the region has a higher share of financial services compared with the UK. Despite being stronger in terms of business services compared with Scotland, the City Region is much weaker than the UK and similarly it is less dependent upon transport & communications although not to the same extent as business services.

Figure 9 Employment Shares - Glasgow/Clyde Valley, difference from UK, 2008



Source: Oxford Economics

3.3 Recent trends in employment

Despite falling population over the past two decades, most urban centres have enjoyed job creation as growth in the service sector began to gather pace. Glasgow Clyde Valley in particular, enjoyed this pattern of growth as firms favoured city centre locations as opposed to less urban based locations due largely to the graduates and labour needs of the service sector.

Table 2 Change in Employment - Glasgow/Clyde Valley, 1998-2008

	% change	
	Scotland	Glasgow/ Clyde Valley
Agriculture	-5.4	30.7
Extraction	11.7	-12.8
Manufacturing	-33.0	-34.2
Utilities	-9.5	-13.5
Construction	15.9	4.1
Distribution	6.6	7.6
Hotels	10.0	16.0
Transport & Communications	13.5	8.2
Financial Services	12.7	28.2
Business services	48.8	54.8
Public admin & defence	-5.5	3.1
Education	38.1	31.6
Health	42.1	48.2
Other personal services	23.4	15.0
Total	12.1	14.3

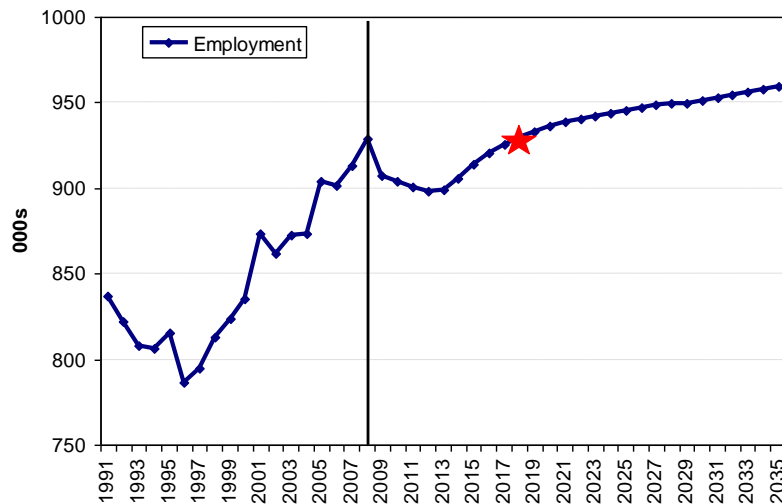
Source: ABI / Oxford Economics

In net terms the employment growth over the past decade has all been within the services sector with the highest level of growth in business services which saw the creation of around 57,150 net jobs over in the past ten years in Glasgow Clyde Valley which grew at a rate that is faster than Scotland as a whole. Around a third of the additional business services jobs were in real estate activities, with legal & accounting services, labour recruitment and industrial cleaning accounted for 16.7%, 15.3% and 13.7% of total additional business services jobs respectively. The public sector was the next biggest source of job creation, which looked at in totality created a combined 63,850 net jobs over the past decade. Most of these jobs were in health reflecting the nature of public spending on health services in Scotland, whilst education also accounted for a significant proportion of job growth however this is also perhaps a factor of government policy which focussed on front line services in the past decade. Employment in public administration increased in Glasgow Clyde Valley despite a decline in Scotland however this is a trend that is evident throughout the UK where government departments which have expanded which tend to be located in cities. Devolution has also provided a stimulus to public admin jobs levels. Most of the employment decline in the last decade was, unsurprisingly, mainly concentrated within the manufacturing sector and this is a trend that is evident both in Glasgow Clyde Valley and at the Scotland regional level.

3.4 Economic Forecasts 2008 to 2035

Oxford Economics advise that the forecasts in Clyde Valley largely mirror the 'shape' of the wider national and Scottish forecasts with a sharp contraction followed by a number of years of modest decline as public sector cuts begin to bite. The recovery is steady, rather than spectacular in jobs (the issue of 'spare capacity') and medium term outlooks offer only modest employment growth prospects.

Figure 10 Total Employment in Glasgow Clyde Valley, 1971-2035

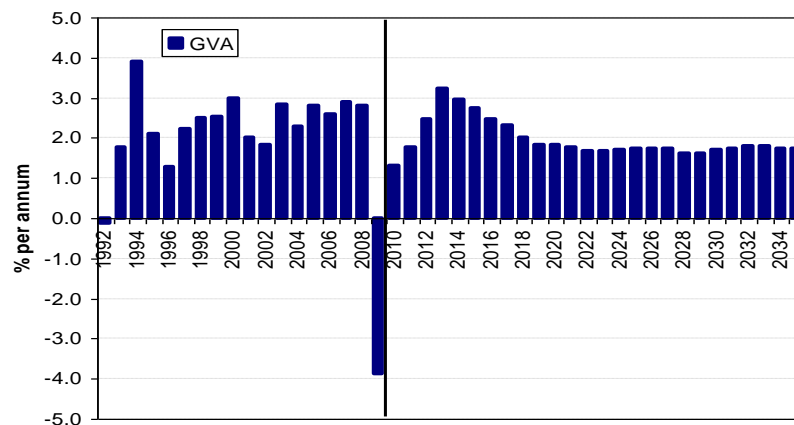


Source: ABI, Oxford Economics

Sectorally a similar story to the Scottish picture is evident in the Clyde Valley region, with the post recession decade only just regaining the recent losses and experiencing about a third of the rate compared to the pre recession decade. Private services offer the main source of employment growth and the key difference to pre recession is the much more challenging outlook for employment in public services.

GVA data is subject to significant problems of measurement at a local level and thus needs to be treated with caution, but in broad terms the sharp 2009 recession is followed by modest growth (which precedes the turn-around in employment growth) before a stronger pick up in recovery and settling down at just under 2% per annum in the longer term.

Figure 11 GVA Growth in Glasgow Clyde Valley, 1971-2035



Source: Regional Accounts, Oxford Economics

Longer term GVA growth at 1.9% is very slightly higher than the Scottish average reflecting the concentration of exporting service sector businesses. Nevertheless this rate is lower than historic averages in the region and similarly employment growth of

2,700 per annum net is well below the averages of the decade past. This reflects a UK view that trend GDP growth will be lower, at around 2.25% compared to pre recession view of 2.5%. London attracts a significant proportion of the high end export jobs which drive this level of growth and as a result other regions such as Scotland and consequently Clyde Valley fall down to closer to a 2% annual average rate of growth.

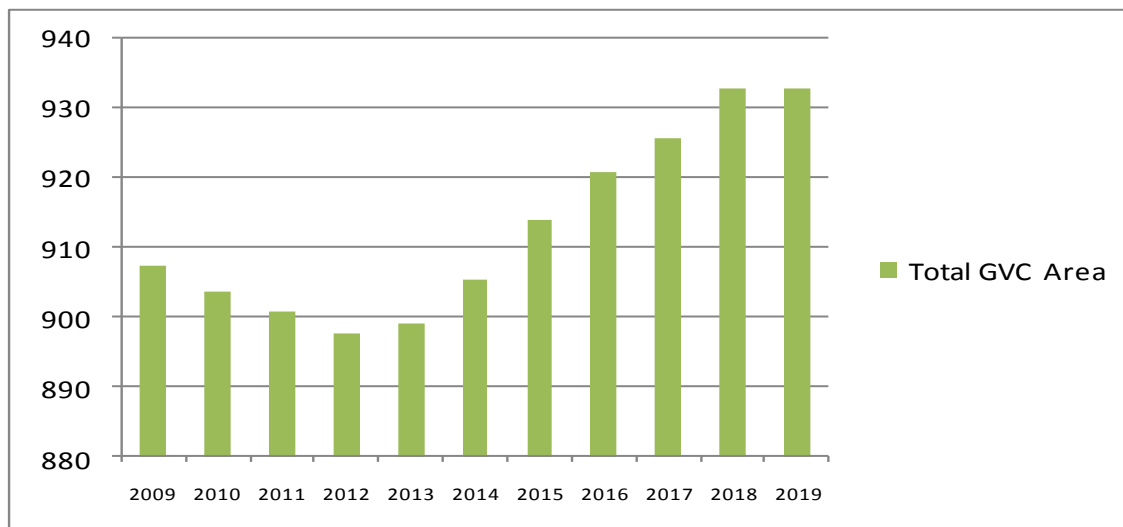
3.5 2009-2019 Employment Forecasts

As can be seen from Table 3 and Figure 12 produced by Oxford Economics the April 2009 forecast suggest growth in employment in the Strategic Development Plan area to 2019, with 25,400 additional employment jobs. (Previously prior to the recession SLIMS had projected additional 35,400 jobs over this same period) This represents an overall projected growth rate over the ten year period of 2.79%. (Previously prior to the recession SLIMS projected a growth rate of 3.9%.)

Table 3 Employment Forecast by Sector each year 2009 – 2019 for Glasgow and the Clyde Valley. (Total Numbers in Employment) (000's)

	2009 No	2010 No	2011 No	2012 No	2013 No	2014 No	2015 No	2016 No	2017 No	2018 No	2019 No
Agriculture	5.1	5.1	5.0	4.9	4.8	4.7	4.7	4.6	4.6	4.4	4.4
Extraction	0.9	0.8	0.8	0.8	0.7	0.7	0.7	0.7	0.6	0.6	0.6
Manufacturing	71.2	68.9	67.5	66.2	64.8	63.3	61.7	60.2	58.8	56.0	56.0
Electricity, gas, water	6.7	6.6	6.5	6.3	6.2	6.0	5.9	5.8	5.7	5.5	5.5
Construction	63.5	59.4	58.7	59.1	60.5	61.6	62.1	62.5	62.9	63.7	63.7
Distribution	134.2	135.0	135.6	136.4	137.2	138.5	140.5	142.1	143.1	144.6	144.6
Hotels	53.7	53.9	53.8	53.8	54.1	54.5	55.3	55.7	55.9	56.4	56.4
Transport & Communication	53.2	52.7	52.8	52.8	52.7	52.7	53.0	53.3	53.4	53.5	53.5
Financial Services	36.5	36.0	36.0	36.0	36.1	36.4	37.0	37.4	37.7	38.2	38.2
Business Services	157.0	158.3	160.9	164.5	169.3	175.3	181.2	185.8	189.3	194.6	194.6
Public Admin and Defence	58.2	58.4	57.2	55.2	54.1	53.7	53.6	53.4	53.3	53.1	53.1
Education	65.6	65.3	64.4	62.9	61.8	61.4	61.3	61.2	61.2	61.1	61.1
Health	145.2	146.5	144.7	141.4	139.1	138.4	138.8	139.5	140.2	141.7	141.7
Other personal Services	53.9	53.8	54.0	54.6	54.9	55.2	55.5	55.8	56.0	56.6	56.6
Total GVC Area	907.3	903.6	900.8	897.8	899.1	905.3	914.1	920.9	925.6	932.7	932.7

Figure 12 Employment Forecast Total Numbers 2009 to 2019



Tables 4 and Table 6 show the economic sectors which are forecast to grow or decline year by year from 2009 and 2019. These tables show both year by year total numbers in employment and the total percentage growth in each of the sectors. Figure 12 shows that jobs overall are forecast to be lost between 2009 and 2012/2013 and only start to grow again from 2014.

Table 4 Employment Forecasts by Sector each year 2009 – 2019 for Glasgow and the Clyde Valley (Total % yearly Growth)

	2009 %	2010 %	2011 %	2012 %	2013 %	2014 %	2015 %	2016 %	2017 %	2018 %	2019 %
Agriculture	-5.0	-1.2	-1.4	-1.9	-2.3	-2.0	-1.1	-1.0	-1.1	-1.3	-1.5
Extraction	-7.1	-4.4	-3.7	-4.1	-4.4	-4.2	-3.5	-3.4	-3.4	-3.4	-3.7
Manufacturing	-6.4	-3.2	-2.0	-2.0	-2.1	-2.4	-2.4	-2.4	-2.4	-2.4	-2.4
Electricity ,gas, water	-6.1	-1.0	-2.2	-2.5	-2.9	-2.4	-1.7	-1.6	-1.6	-1.7	-1.9
Construction	-5.4	-6.4	-1.2	0.6	2.4	1.8	0.8	0.6	0.6	0.6	0.6
Distribution	-3.6	0.5	0.5	0.6	0.6	1.0	1.5	1.1	0.7	0.5	0.5
Hotels	-2.6	0.3	-0.2	0.1	0.5	0.9	1.4	0.7	0.5	0.4	0.4
Transport &Communication	-2.7	-0.9	0.2	0.0	-0.2	0.0	0.6	0.5	0.3	0.1	0.0
Fiancial Services	-3.2	-1.3	-0.2	0.1	0.3	0.9	1.5	1.1	0.8	0.7	0.6
Business Services	-2.8	0.8	1.6	2.2	2.9	3.6	3.3	2.5	1.9	1.4	1.4
Public Admin and Defence	-1.1	0.3	-2.0	-3.6	-2.0	-0.7	-0.2	-0.2	-0.2	-0.2	-0.2
Education	1.8	-0.5	-1.4	-2.4	-1.7	-0.7	-0.1	-0.1	-0.1	-0.1	-0.1
Health	1.2	0.9	-1.2	-2.2	-1.7	-0.5	0.3	0.5	0.5	0.5	0.5
Other personal Services	-1.1	-0.2	0.5	1.1	0.5	0.5	0.7	0.5	0.4	0.6	0.4
Total GCV Area	-2.3	-0.4	-0.3	-0.3	0.1	0.7	1.0	0.7	0.5	0.4	0.4

Tables 5 and 6 summarises the forecast sector changes. As can be seen between 2009 and 2014 it is forecast that the Glasgow and Clyde Valley economy will shed a total of 2,000 jobs with Extraction (-22%), Manufacturing (-11%), Electricity, Gas Water (-10.5%) being the sectors which shed the greatest proportion of jobs while those sectors gaining the greatest jobs will be Business Services (+11.6%), Distribution (+3.2%) and Other Personal Services (+2.4%). However, between the period 2014 to 2019 the overall employment is forecast to grow again creating an additional 25,400 jobs led by strong growth in the Business Services sector.

Table 5 Sectoral employment change in Glasgow Clyde Valley

	1998-2008 (000s)	2008-2010 (000s)	2010-2020 (000s)
Agriculture	1.3	-0.3	-0.7
Extraction	-0.1	-0.1	-0.3
Manufacturing	-39.5	-7.2	-14.3
Utilities	-1.1	-0.5	-1.2
Construction	2.7	-7.7	4.6
Distribution	9.8	-4.3	10.3
Hotels	7.6	-1.2	2.7
Transport & comms	4.2	-2.0	0.8
Financial services	8.3	-1.7	2.4
Business services	57.1	-3.2	38.8
Public admin. & defence	1.7	-0.5	-5.4
Education	15.5	0.9	-4.2
Health	46.6	3.0	-4.1
Other personal services	7.1	-0.7	3.1
Total	115.8	-24.9	32.5

Source: Oxford Economics

Table 6 Employment Forecast Change by Sector 2009 – 2014 – 2019 for Glasgow and the Clyde Valley

	Total 2009 No(000's)	Total 2014 No(000's)	Total 2019 No(000's)	Change 2009 – 2014		Change 2009 – 2019	
				No	%	No	%
Agriculture	5.1	4.7	4.4	-400	-7.84	-700	-13.72
Extraction	0.9	0.7	0.6	-200	-22.22	-300	-33.33
Manufacturing	71.2	63.3	56.0	-7,900	-11.09	-15,200	-21.34
Electricity, gas, water	6.7	6.0	5.5	-700	-10.44	-1,200	-17.91
Construction	63.5	61.6	63.7	-1,900	-2.99	200	0.31
Distribution	134.2	138.5	144.6	4,300	3.20	10,400	7.74
Hotels	53.7	54.5	56.4	800	1.48	2,700	5.02
Transport & Communication	53.2	52.7	53.5	-500	-0.93	300	0.56
Financial Services	36.5	36.4	38.2	-100	-0.27	1,700	4.65
Business Services	157.0	175.3	194.6	18,300	11.65	37,600	23.94
Public Admin and Defence	58.2	53.7	53.1	-4,500	-7.73	-5,100	-8.76
Education	65.6	61.4	61.1	-4,200	-6.40	-4,500	-6.85
Health	145.2	138.4	141.7	-6,800	-4.68	-3,500	-2.41
Other personal Services	53.9	55.2	56.6	1,300	2.41	2,700	5.00
Total GCV Area	907.3	905.3	932.7	-2,000	-0.22	25,400	2.79

Table 7 and Figure 13 show the employment forecast change by local authority area. As can be noted the period 2009 to 2014 shows all local authorities shedding jobs with the exception of Glasgow City. In this period 0.22% jobs are forecast lost in the Glasgow and Clyde Valley area but this has to be seen in the context of Scotland overall where 1.1% of jobs are lost. The forecast 2009 to 2019 situation shows that all local authority areas will again gain jobs over this period with the exception of East and West Dunbartonshire. A growth rate of 2.79% is forecast overall in the Glasgow and Clyde Valley area with Glasgow City (4.2%), South Lanarkshire (3.1%) and Renfrewshire (2.1%) forecast to create the highest proportion of job growth. The 2.79% growth rate is forecast to be greater than the overall Scottish growth rate of 2.32% over the same period.

Table 7 Employment Forecast Change by Local Authority Area 2009 – 2014 – 2019.

	Total 2009	Total 2014	Total 2019	Change 2009 – 2014		Change 2009 – 2019	
	No(000's)	No(000's)	No(000's)	No	%	No	%
East Dunbartonshire	27.9	27.1	27.3	-0.8	-2.86	-0.6	-2.15
East Renfrewshire	21.8	21.4	21.8	-0.4	-1.83	0.0	0.0
Glasgow City	430.9	433.4	449.0	2.5	0.58	18.1	4.20
Inverclyde	31.7	31.2	32.0	-0.3	-0.94	0.3	0.94
North Lanarkshire	135.9	134.5	137.6	-1.4	-1.03	1.7	1.25
Renfrewshire	86.0	85.5	87.8	-0.5	-0.58	1.8	2.09
South Lanarkshire	135.6	135.4	139.8	-0.2	-0.14	4.2	3.09
West Dunbartonshire	37.5	36.7	37.4	-0.2	-0.53	-0.1	-0.26
Glasgow Clyde Valley	907.3	905.30	932.7	-2.0	-0.22	25.4	2.79
Scotland	2666.9	2637.8	2728.8	-29.1	-1.09	61.9	2.32

Figure 13 Employment Forecast by LA's 2009 – 2014 – 2019. Total Numbers.

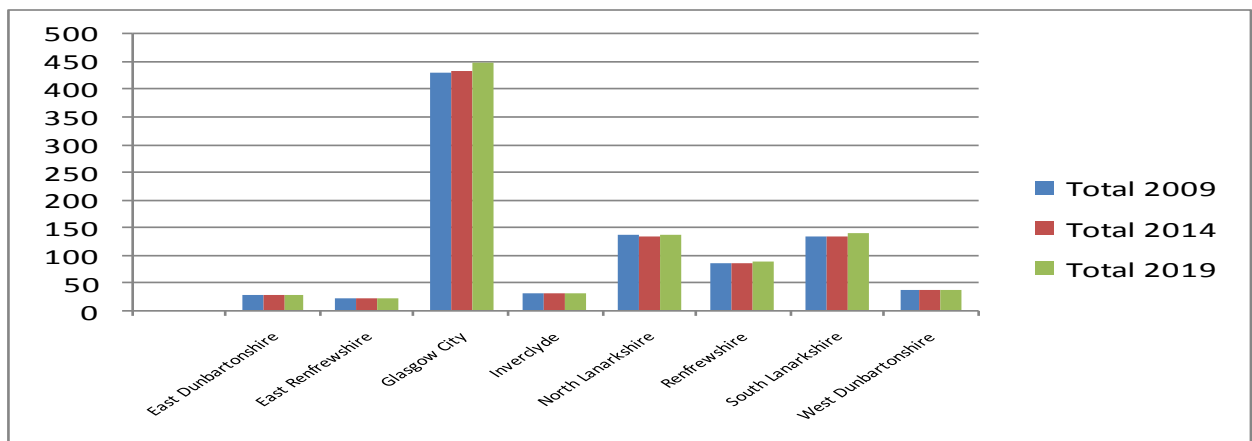
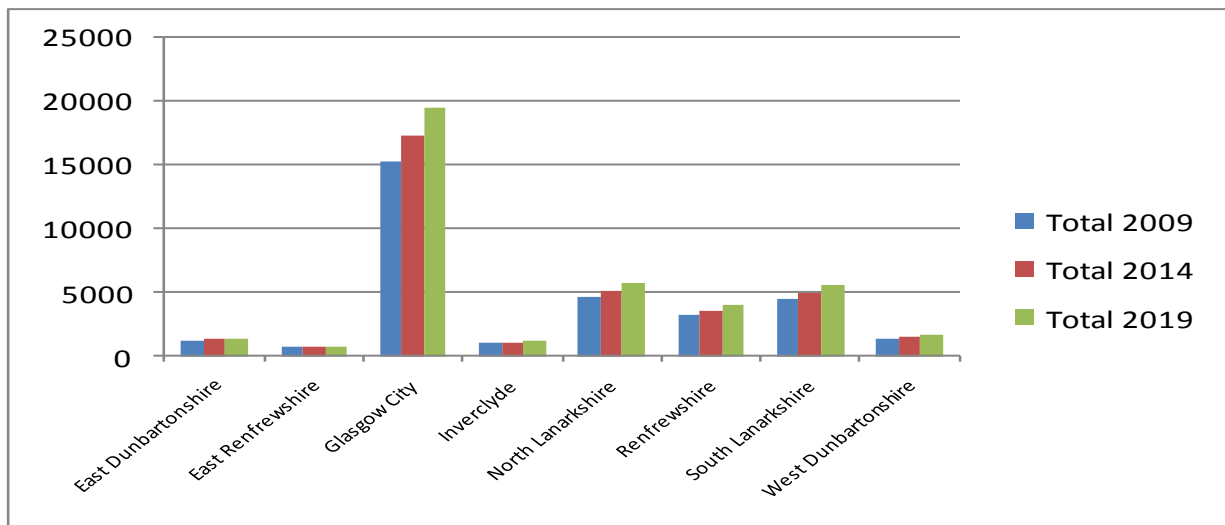


Table 8 and Figure 14 shows the forecast GVA change by local authority area over the ten year period. It is Glasgow City (27.7%), Renfrewshire (26.1%) and South Lanarkshire (25.9%) which is forecast to show the highest gains. Overall the Glasgow and Clyde Valley area is forecast to grow GVA by 25.7% which compares to a Scottish GVA growth rate of 25.04% over the same period.

Table 8 Gross Value Added (GVA) Forecast Change by Local Authority Area 2009 – 2014 – 2019

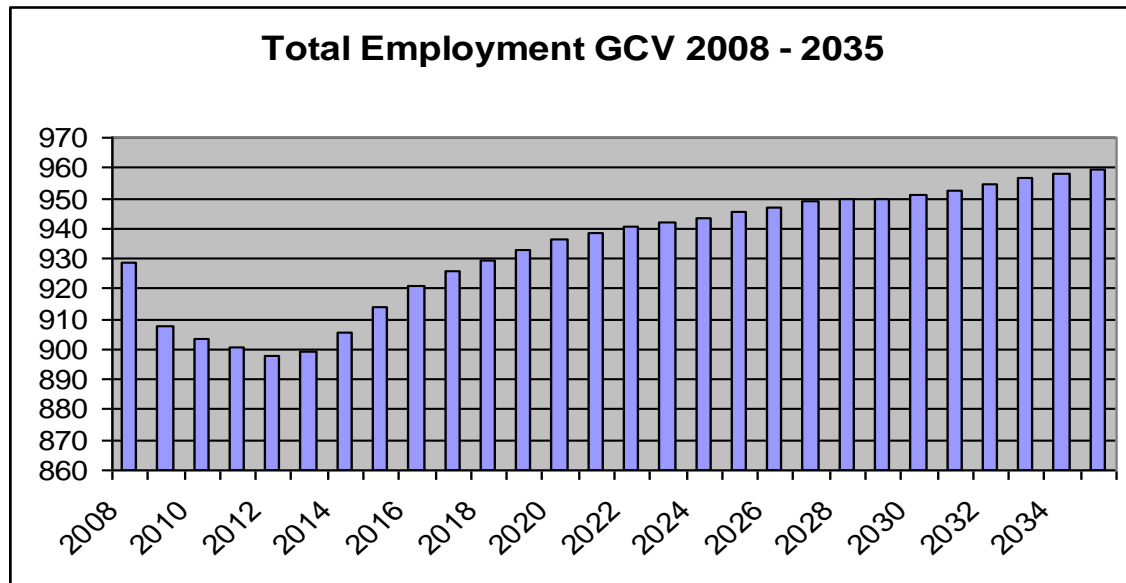
GVA	Total 2009	Total 2014	Total 2019	Change 2009 – 2014		Change 2009 – 2019	
				No	%	No	%
East Dunbartonshire	1152	1267	1380	115	9.98	228	19.79
East Renfrewshire	651	698	761	47	7.21	110	16.89
Glasgow City	15313	17327	19557	2,014	13.15	4244	27.71
Inverclyde	951	1054	1167	103	10.83	216	22.71
North Lanarkshire	4578	5104	5668	526	11.48	1090	23.80
Renfrewshire	3144	3562	3965	418	13.29	821	26.11
South Lanarkshire	4406	4956	5548	550	12.48	1142	25.91
West Dunbartonshire	1396	1515	1666	119	8.52	270	19.34
Glasgow Clyde Valley	31590	35483	39712	3893	12.32	8122	25.71
Scotland	91386	102267	114270	10,881	11.90	22884	25.04

Figure 14 GVA Forecast by LA's 2009 – 2014 – 2019. Total Numbers.



3.6 Implications of Oxford Economics Employment Projections

Figure 15 Employment Projections in Glasgow and Clyde Valley 2008 - 2035



Source: Oxford Economics/GCV

The OE's employment projections envisage a growth in jobs in the Glasgow and Clyde Valley area of an additional 25,400 jobs by 2019 and an additional 51,900 jobs by 2035. The most significant contributors to this growth are in the **Business Services and Health Care sectors**. Also forecast to grow significantly are **Distribution and Construction**. Also of significance in terms of growth are the **Financial Services sector and Hotel Sector**.

Implications of Oxford Economics Different Scenario's

Table 9 Additional jobs by 2025

(000's)	Rebalancing scenario	Migration scenario	HNDA migration scenario C
Agriculture	1.3	0.0	0.0
Extraction	0.3	0.0	0.0
Manufacturing	23.4	7.6	5.6
Utilities	1.8	0.0	0.0
Construction	1.2	2.5	1.9
Distribution	2.8	5.1	3.8
Hotels	15.6	5.1	3.8
Transport & comms	0.2	3.8	2.8
Financial services	0.6	3.8	2.8
Business services	-4.8	15.2	11.3
Public admin. & defence	-0.2	0.0	0.0
Education	2.8	2.5	1.9
Health	-0.5	2.5	1.9
Other personal services	15.3	2.5	1.9
Total	59.8	50.7	37.6

Source: Oxford Economics

Sectorally the migration (Low migration) and the HNDA (high migration) scenario C have continued concentration of additional 'export orientated' employment in the business services sectors, with associated indirect and supply chain employment following this pattern. In contrast the re-balancing scenario moves employment away from business services and into other potential export markets such as tourism, high tech manufacturing and leisure. The relationship with downstream consumer activities is slightly different under this scenario as the UK structure changes - as such the additional jobs in retailing and construction are more modest. There may be some risks inherent in this structural shift and additional construction employment may be required for example to create sites appropriate to the new employment.

3.7 Conclusions and Implications for Review of Strategic Economic Locations

The message from the OE report and shown in Tables 9 and 10 is that in future within the GCV and for the SDP and LDP to consider is the need to focus on strategic economic locations that promote and encourage the Sectors which are forecast to grow - **Business Services Sector, Health Sector, Construction Sector and Distribution Sector**. To a slightly lesser extent is the need to focus on the locational needs of the **Financial Services Sector and the Hotel Sector**.

3.8 Locational Requirements of Growth Sectors

Each of these potential growth sectors has different locational requirements and this required to be taken into account when consideration was given to the review of the strategic economic locations in the SDP.

- **Business Services** essentially require quality office space which given the high people trip generating implications require to be spatially located in sustainable locations – high accessibility from all modes of transport especially Public Transport. This would imply that these office locations would be best located in City Centre, town centres and strategically located highly accessible business parks. This is an important strategic consideration for the SDP.
- **Health Sector** growth may not result in any significant demands for land but again this is a sector which generates significant people trip generation and therefore requires to be located in highly accessible locations especially for Public Transport.
- **Construction Sector** activity generally focuses on yardspace and at a local rather than strategic significant level. LDP's will need to ensure that local industrial land is protected in order to accommodate this predicted construction sector growth.
- **Distribution Sector** requirements are a complete polar opposite from the needs of the business services sector. Distribution sector requires large areas of land but generate few people trip generation but generally high road vehicle trips. Need to be located near the major road freight routes (and rail routes). This is an important strategic consideration for the SDP.
- **Financial Services** requirements are similar to the Business Services sector requirements. High quality office space in accessible locations which are best located in City Centres, town centres or financial cluster within business

parks. This is another sector which has important strategic considerations for SDP.

- **Hotel Sector** is related to tourism sector. Tends to be high people trip generation and best suited to sustainable accessible locations but is such a diverse sector it is difficult for the SDP to strategically direct and may be more of an individual LDP focus.

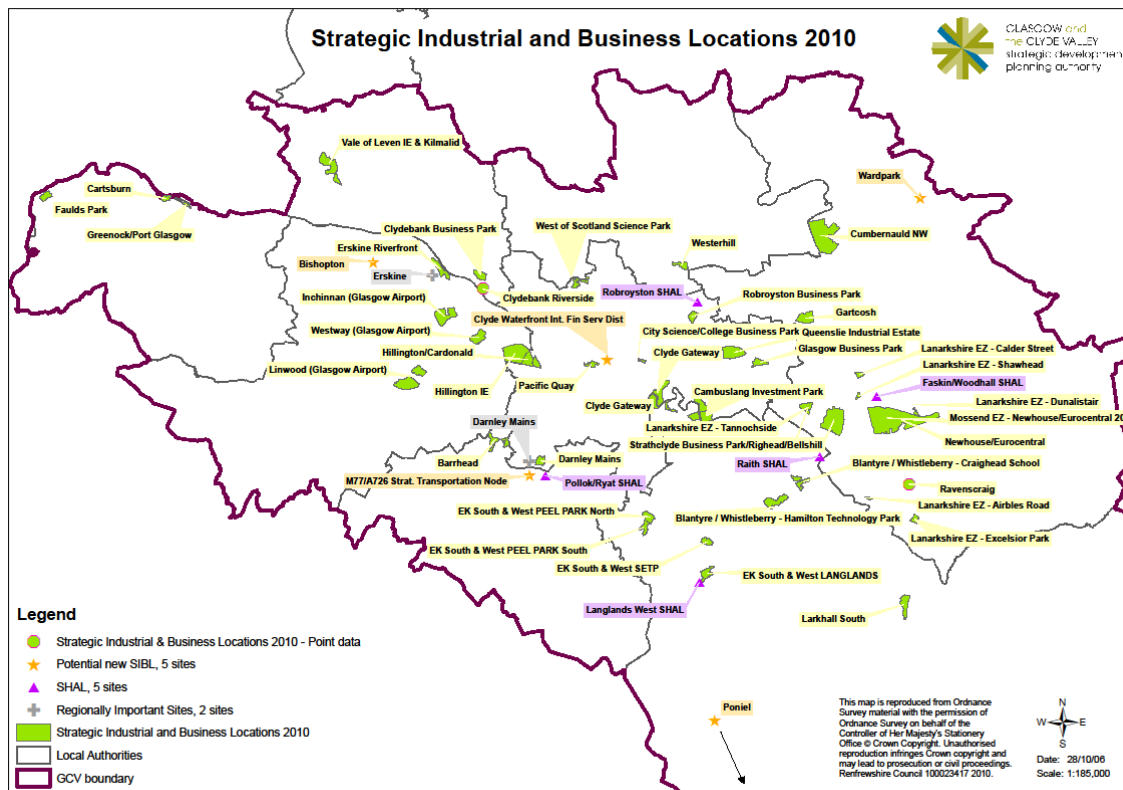
4. Identifying the Strategic Economic Investment Locations

4.1 The Review of the existing Strategic Economic Locations

The critical issue was the identification of Strategic Economic Locations within the Strategic Development Plan. The challenge was how to make the inherited industry, business and office locations, clearer and more focused for inclusion into the new Strategic Development Plan. From the Issues Report responses, the consensus from stakeholders was that the number of locations to be included in the SDP should be substantially reduced. It was required that the locations identified within the Strategic Development Plan were clearly strategic, with strong consideration given to the roles and functions that these locations contribute. Role and function would underpin the assessment of whether a location fulfils a strategic function.

The review will underpin the Main Issues Report and focus upon the Strategic Industrial and Business Locations, former Safeguarded High Amenity Locations and any new emerging economic locations of in terms of their strategic roles and functions. At the outset a list of 53 locations were considered for review.

Map 1 All Strategic Industry and Business Locations Considered



With the assistance of the Topic Group, the task of assessing and rationalizing the Strategic Economic Locations was undertaken, focusing on the Strategic Industry and Business Locations, Safeguarded High Amenity Locations and any new potential strategic location. The assessment process was to achieve a recommended list of Strategic Economic Investment Locations (SEILs) for inclusion in the Strategic

Development Plan within the context of a network of strategic economic locations which are either to be **safeguarded** from non industrial or business used or are **opportunity** locations for future development.

A clear set a series of criteria was established in order to assist in assessing “what is strategic”. The identified strategic economic locations were derived from analysis and a strategic assessment of wider roles and functions. The analysis was high level and comparative and often required the exercise of subjective professional judgement. The final list of strategic economic locations was therefore not completely objective nor an absolute. It is useful to note that some of the existing SIBL locations which were not carried forward as Strategic Economic Investment Locations (SEILs) may be added to the SEIL list following future five year reviews of the SDP as they become better developed in terms of their role and function in the future GCV economy especially as the rebalancing economy develop a more spatial dimension.

4.2 Criteria for identification of Strategic Economic Investment Locations (SEILs)

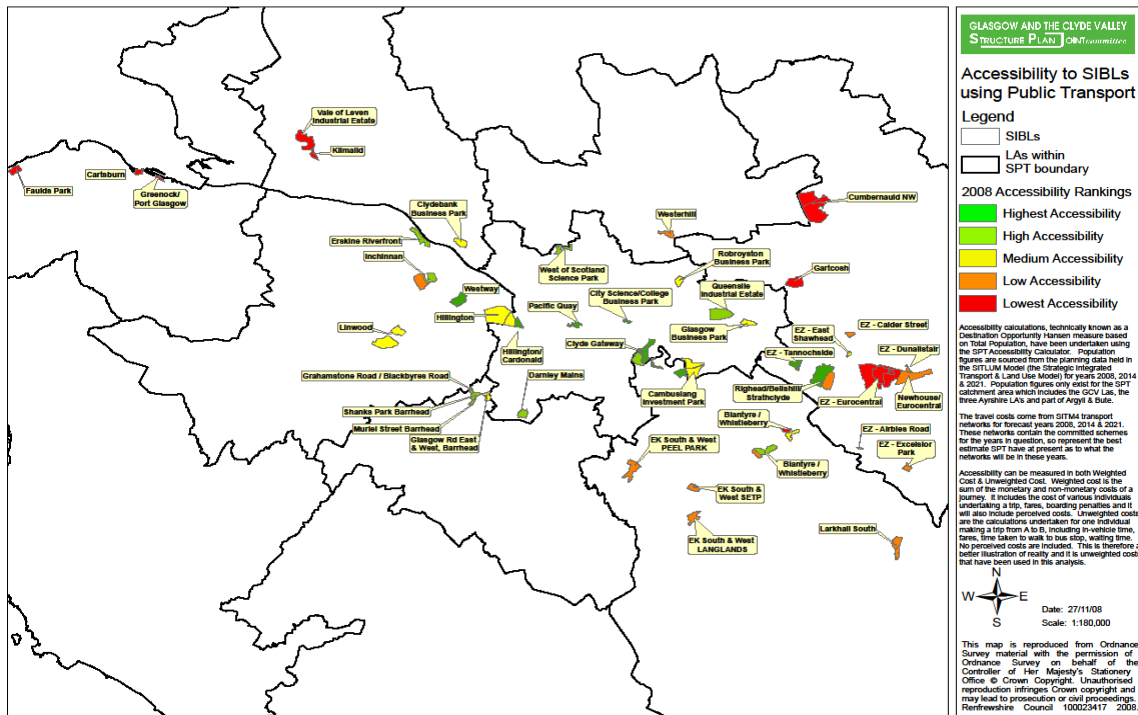
Complementary to the quantitative analysis, it was recognised that size and accessibility were important criteria but probably even more consideration has been given to a high level assessment of their wider **roles and functions**.

The following **criteria** that was adopted to identify potential SEILs:

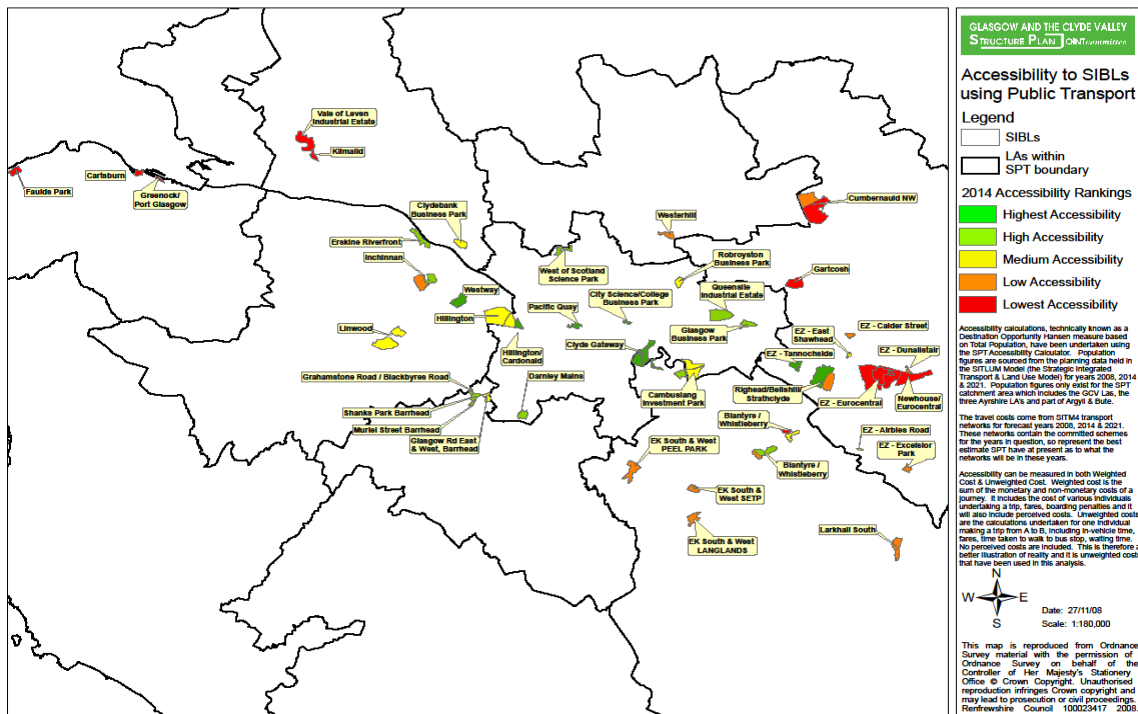
- **Basic Data**
 - Area of Site currently designated.
 - Total possible area of Site including Landscaping.
 - % of area currently designated still available for development.
 - % of site currently designated that is designated as Marketable Land (Definition of Marketable Land shown in Appendix)
 - % of site currently designated that is designated as Quality Land. (Definition of Quality Land shown in Appendix)
 - Length of time site has been designated and available as employment land.
 - Total Take-Up of each site employment land since 2004/05.
- **Relative Accessibility**
 - Existing SIBL locations were assessed through the SPT Accessibility Model focusing on each sites relative accessibility to Public Transport.
 - Each location was given an absolute score and ranked by relative accessibility. This was done for base year 2008, projected to 2014 and projected to 2021.

- Assessed if each location had an existing Travel Plan in place.

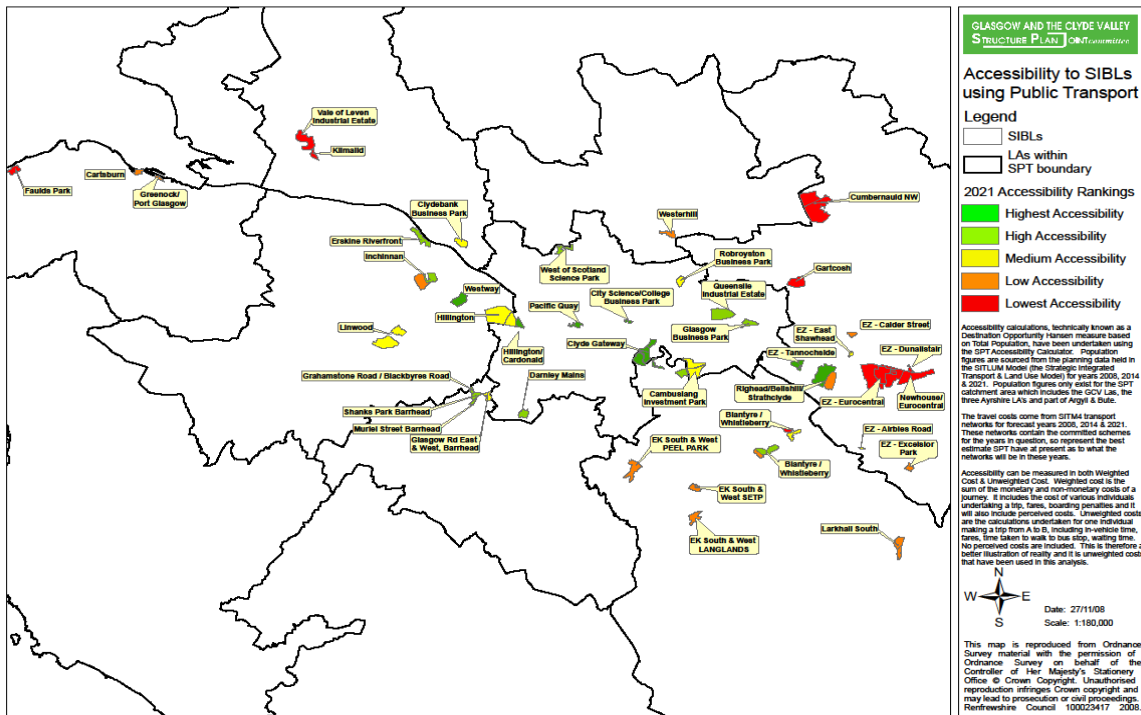
Map 2 Accessibility Rank 2008



Map 3 Accessibility Rank 2014



Map 4 Accessibility Rank 2021



- **Role and Function Criteria**

- Type of SIBL – General Industry, High Quality Business Park, Distribution /Warehouse, Established Office location, Heavy specialist Industrial, Research and Technology Park, Science Park.
- Has the SIBL no or limited opportunities for further development – Is the site built out.
- Has the site been under pressure from non industrial or business uses.
- Does the site contribute to the Strategic Regeneration areas.
- Is the site crucial for the success of the Metropolitan Development Strategy.

In terms of role and function criteria it was recognised that in terms of weighting of criteria there were three criteria that were required to be given much higher status and importance.

- 1 Does the site contribute to the **Governments Key Sectors**. The key sectors being:

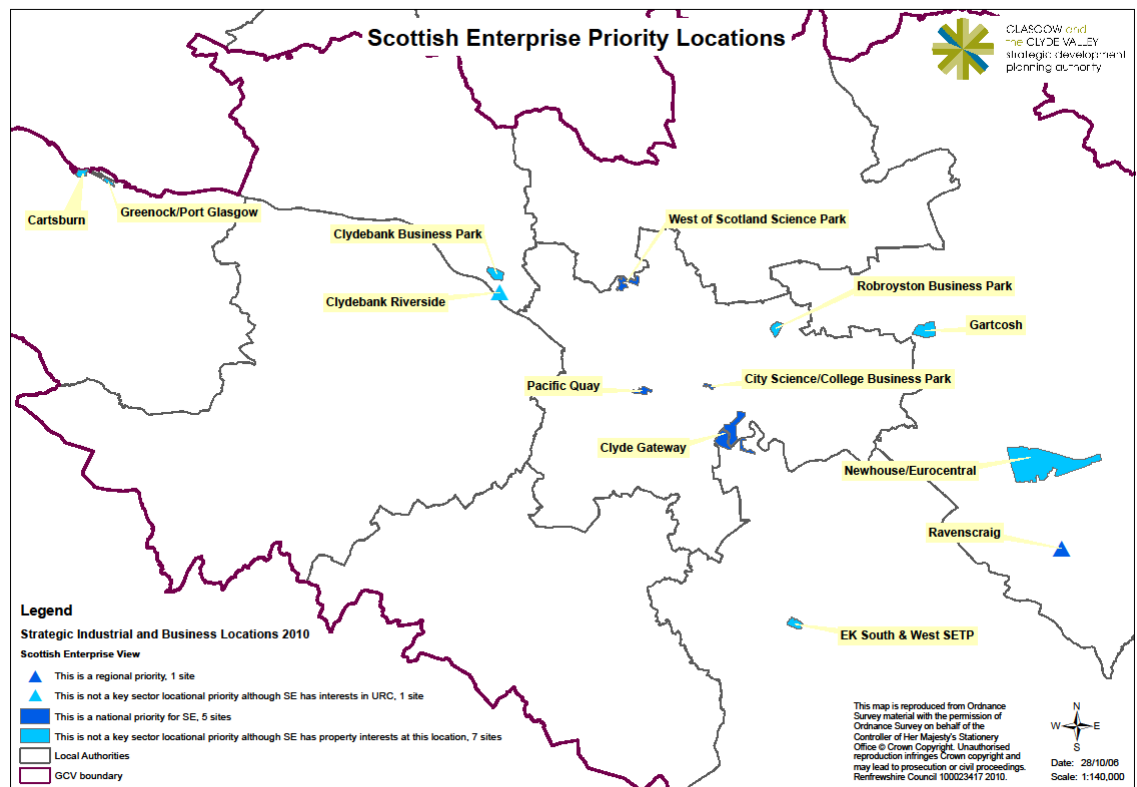
- Creative Industries (Including digital content and technologies)

- Energy (with a focus on renewables)
- Financial and Business Services
- Food and Drink (Including agriculture and fisheries)
- Life Sciences (Including biotechnology and translational medicine)
- Tourism

2 Scottish Enterprise's view on their **Key Sectorial Location Priorities**.

- If the location is a Key National or Regional Priority for Scottish Enterprise
- If the location is not a key locational priority but SE has an interest in the location through involvement with the local regeneration company.

Map 5 Scottish Enterprises Priority Locations



National or Regional Priority for Scottish Enterprise

- West of Scotland Science Park
- Clyde Waterfront - Pacific Quay/IFSD
- Clyde Gateway

- City Science (International Technology Renewables Energy Zone)
- Ravenscraig

Not a priority for Scottish Enterprise but they have involvement either through the local regeneration company or land ownership.

- Inverclyde Riverside
- Clydebank Riverside
- Robroyston
- Gartcosh
- EK South and West SETP
- Eurocentral

3 Does the site promote the **Growth Sectors Identified in Oxford Economics Report**. The key growth sectors identified were:

- Business Services
- Financial Services
- Construction Sector
- Distribution Sector
- Health Sector
- Hotel Sector

Table 10 Sectoral employment change in Glasgow Clyde Valley (OE source)

	1998-2008 (000s)	2008-2010 (000s)	2010-2020 (000s)
Agriculture	1.3	-0.3	-0.7
Extraction	-0.1	-0.1	-0.3
Manufacturing	-39.5	-7.2	-14.3
Utilities	-1.1	-0.5	-1.2
Construction	2.7	-7.7	4.6
Distribution	9.8	-4.3	10.3
Hotels	7.6	-1.2	2.7
Transport & comms	4.2	-2.0	0.8
Financial services	8.3	-1.7	2.4
Business services	57.1	-3.2	38.8
Public admin. & defence	1.7	-0.5	-5.4
Education	15.5	0.9	-4.2
Health	46.6	3.0	-4.1
Other personal services	7.1	-0.7	3.1
Total	115.8	-24.9	32.5

4.3 Classification into Opportunity Sites and Safeguarded Sites

It was recognised that the current list of sites under consideration consisted of two quite different location types. A) Established locations which needed to be safeguarded from alternative competing uses and B) locations that still had large opportunity sites available but the exact future use is not clear as yet. In order to clarify this issue the locations under consideration were all classified into:

- A) Site to be **Safeguarded** through the SDP. Need to safeguard unique strategic locations from alternative competing uses. Established sites that are largely built out with little opportunity for expansion and are currently occupied by key sector type functions. Site was of unique regional importance fulfilling a strategic role requiring continued safeguarding in SDP.
- B) Sites which are strategic **Opportunity** locations. Sites which have large areas of employment land available and offer the opportunity to accommodate future development. Linked where possible to regeneration areas but where the future uses are not as yet clear but there is an aspiration to develop the site for key industry uses.

4.4 Process undertaken to assess locations

The criteria outlined above was assembled and summarised into a spreadsheet and set against the 53 possible locations. The data was built up through Topic Group workshops with an input of professional judgement and thereafter as further data became available from inputs from Oxford Economic's report and from meetings and discussions with Scottish Enterprise. The final assessment was undertaken at a Topic Group workshop in July 2010 when all the criteria data was available.

The initial workshops sub divided the sites into:

- Sites for Local Development Plan consideration.
- Sites that were strategic for SDP consideration
- Un-determined "middle list" for further consideration.

All the undetermined sites were site visited by the Topic Group members. The additional criteria from Oxford Economics was received in April 2010. The Scottish Enterprise criteria was finalised in June 2010. The Safeguarded and Opportunity criteria was finalised in July 2010. The issues identified by the Topic Group were consulted upon in the Main Issues Report for the Strategic Development Plan in November/December 2010. The representations received from the MIR consultation process resulted in the Joint Committee approving additional locations to be included.

4.5 The process to identify the Topic Groups Recommended Preferred Option.

The starting point for the assessment process was the re-assessment of the 53 location as some locations would be better fit if combined into broader groupings i.e three separate locations were combined to form Glasgow Airport Zone location, two sites combined to form Inverclyde Riverside. Similarly some sites were sub divided i.e. Peel Park was subdivided into North and South and HITP was separated from the remainder of Blantyre /Whistleberry SIBL. As a result of this process 44 sites were put forward for consideration against the criteria.

Figure 16 The Initial 44 Sites Under consideration

Starting point – 44 Sites Under Consideration			
Barrhead	Darnley Mains	Hillington/Renfrew North	Raith Interchange
Bishopton	Erskine	Inverclyde Riverside	Ravenscraig
Blantyre/Whistleberry (excl HITP)	Erskine Riverside	Junction 5 M77/A726 (new site)	Righead/Bellshill/Strathclyde Business Park
Cambuslang	Eurocentral	Langlands Business Park and Peel Park South	Robroyston
City Science (City Centre)	Faskine/Woodhall	Langlands West	Robroyston South
Clyde Gateway	Faulds Park	Larkhall South	Scottish Enterprise Technology Park
Clydebank Business Park	Former Lanarkshire EZ sites (excl Tannochside)	Pacific Quay	Tannochside Enterprise Zone site
Clydebank Riverside	Gartcosh	Peel Park North	Vale of Leven Ind Est/Kilmalid
College Business	Glasgow Airport (3 sites)	Pollock/Ryat	Wardpark Cumbernauld
Cumbernauld North West	Glasgow Business Park	Poniel (new site)	West of Scotland Science Park
Cardonald Park	Hamilton international technology Park	Queenslie	Westerhill

The Topic Group first considered the option - **Alternative 1 - Continue to safeguard and promote all the 44 locations as Structure Plan Strategic Economic Locations.**

This option was seen as the least sustainable option in terms of centralisation and accessibility and diluted the strategic importance of key locations in terms of role and function. This was the least preferred option and consideration was given to reducing this list seeking to exclude all the locations which were best safeguarded at a LDP level.

Using the set criteria and using professional judgement the consensus produced the following list of locations which were perhaps best safeguarded at a LDP level. This was only a recommendation as it would be up to each Local Authority to make a judgement on this matter when they review their LDP for submission.

Figure 17 Locations to be Recommended to be Safeguarded at LDP Level

Locations to be Safeguarded at LDP Level (Initial List)			
Barrhead	Cumbernauld North West	Glasgow Business Park	Tannochside Enterprise Zone site
Blantyre/Whistleberry	Darnley Mains	Langlands Business Park and Peel Park South	Wardpark Cumbernauld
Cambuslang	Erskine	Queenslie	
Cardonald Park	Erskine Riverside	Raith Interchange	
Clydebank Business Park	Faulds Park	Righead/Bellshill/Strathclyde Business Park	
College Business Park	Former Lanarkshire EZ sites (excl Tannochside)	Robroyston South	

Map 6 Locations Recommended to be Safeguarded in Local Development Plans

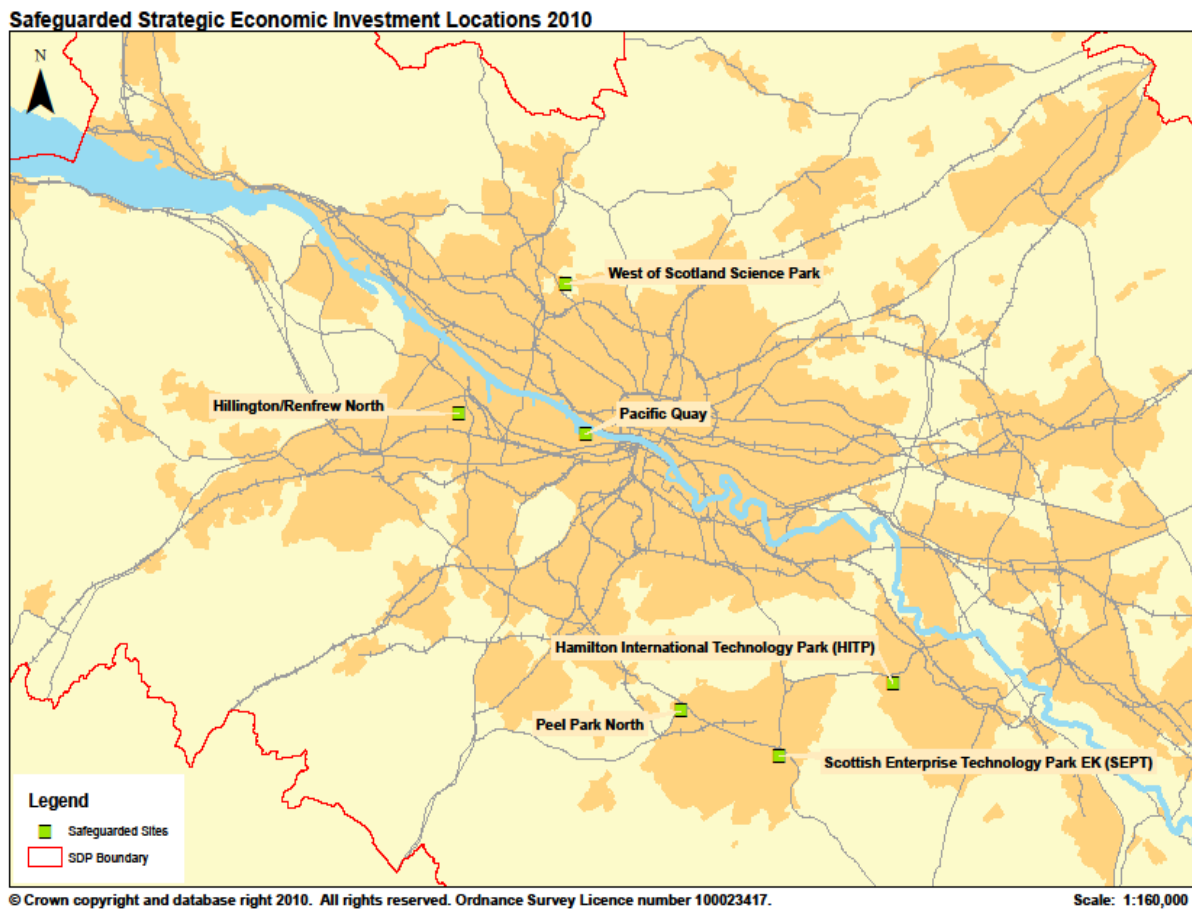


Using the set criteria and professional judgment the Topic Group then considered the remaining 27 locations and agreed at this stage to identify those locations which would meet the criterion as a Safeguarded Location for protection at a SDP level. 6 Locations were identified as Safeguarded Locations.

Figure 18 Safeguarded Locations

Sites identified as Safeguarded Locations			
Hamilton International Technology Park	Pacific Quay	Scottish Enterprise Technology Park	
Hillington/Renfrew North	Peel Park North	West of Scotland Science Park	

Map 7 Safeguarded Locations



The final 18 sites were then considered as Opportunity Locations.

Figure 19 Strategic Opportunity Locations

Strategic Opportunity Locations			
Bishopton	Eurocentral	Inverclyde Riverside	Pollock/Ryat
City Science (City Centre)	Faskine/Woodhall	Junction 5 M77/A726 (new site)	Poniel (new site)
Clyde Gateway	Gartcosh	Langlands West	Ravenscraig
Clydebank Riverside	Glasgow Airport Zone (3 sites)	Larkhall South	Robroyston
Vale of Leven Ind Est/ Kilmalid	Westerhill		

The Topic Group then considered an **Alternative 2 - Strategic Safeguarded Locations plus “longer list” of the 18 Opportunity Locations**. This option included the 6 Safeguarded Locations plus all the 18 Opportunity Locations. This option included opportunity locations which may not promote key sectors, may be poorly accessible and may have uncertainties as to if and when they would be delivered. This was the second preferred option but the Topic Group were still intent in refining the Opportunity Locations to eliminate those locations which were considered to be less aligned to the sustainable development goals of the SDP, were less aligned to key sectors and growth sectors, and where there were barriers, uncertainties and timescale issues for delivery.

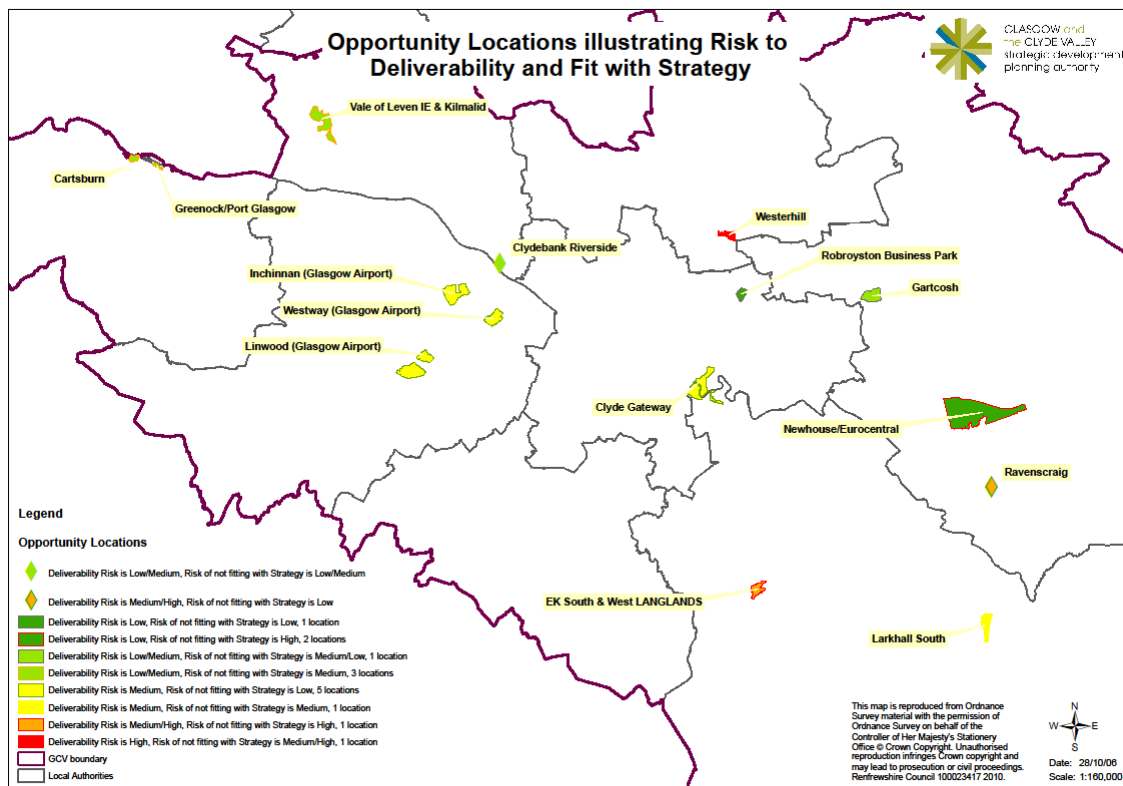
In order to refine the Opportunity Locations further the Topic Group agreed to assess these locations in terms of a **Risk Analysis**. The Risk Analysis was based on two criteria - the risk to the SDP Strategy and the risk of Delivery. The higher the risk to the Strategy the poorer the fit to the SDP. The higher the risk of delivery the more uncertainty.

Figure 20 Opportunity Locations against Risk Analysis

Opportunity Locations	Risk		
	Authority	Deliverability	Fit with Strategy
Bishopton	RC	Medium/High	Low
City Science	GCC	Low/Medium	Low
Clyde Gateway	GCC/SLC	Medium	Low
Clydebank Riverside	WDC	Low/Medium	Low/Medium
Eurocentral	NLC	Low	High
Faskine/Woodhall	NLC	High +	High +
Gartcosh	NLC	Low/Medium	Low/Medium
Glasgow Airport Zone (3 sites)	RC	Medium	Low

Inverclyde Riverside	IC	Low/Medium	Medium
Junction 5 M77/A726 (New Site)	ERC	High +	High +
Langlands West	SLC	Medium/High	High
Larkhall South	SLC	Medium	Medium
Pollock/Ryat	ERC	High	High
Poniel (New Site)	SLC	Low	Low
Ravenscraig	NLC	Medium/High	Low
Robroyston	GCC	Low	Low
Vale of Leven Ind Est / Kilmalid	WDC	Low/Medium	Medium
Westerhill	EDC	High	Medium/High

Map 8 Opportunity Locations Illustrating Risk to Delivery and Fit with Strategy



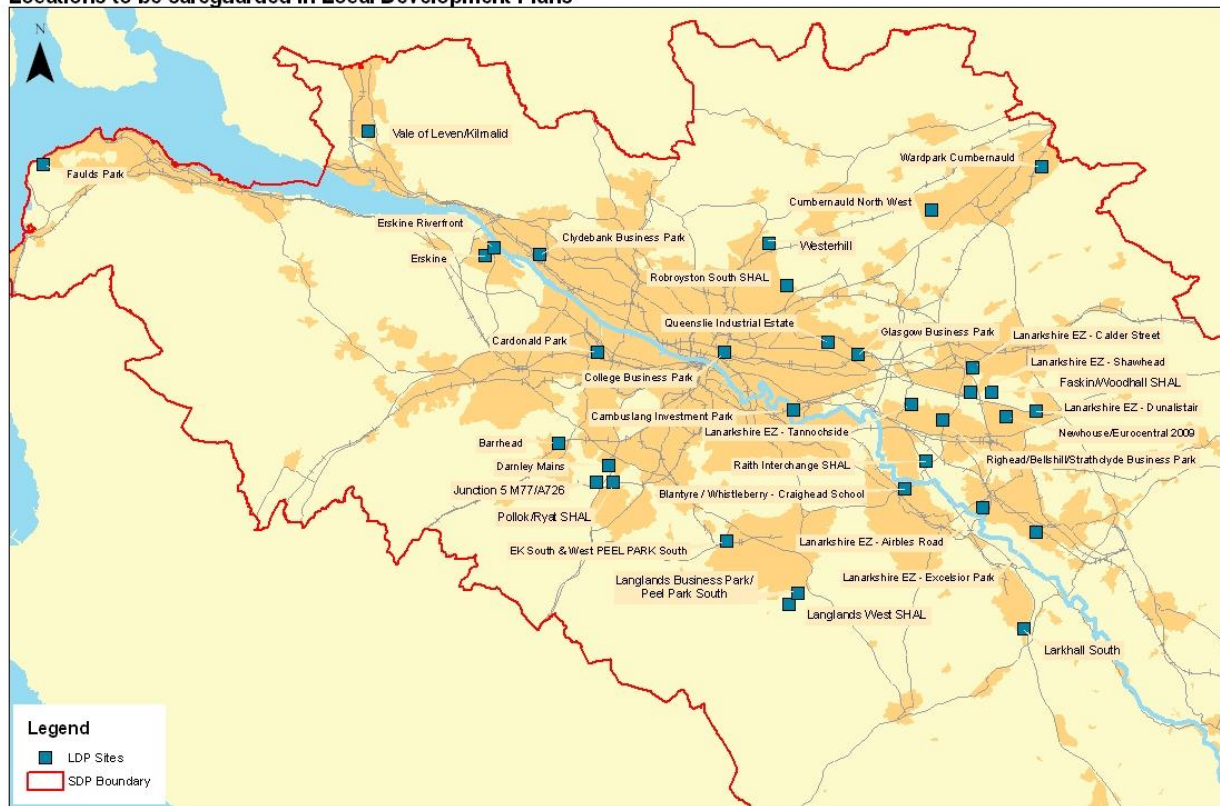
Based on the results of the Risk Analysis the Topic Group selected the 12 Opportunity Locations which best fit with the Strategy and showed the best risk of being delivered.

Figure 21 Final List of Locations recommended to be Safeguarded at LDP Level

Locations to be Safeguarded at LDP Level (Final List)			
Barrhead	Cumbernauld North West	Glasgow Business Park	Tannochside Enterprise Zone site
Blantyre/Whistleberry	Darnley Mains	Langlands Business Park and Peel Park South	Wardpark Cumbernauld
Cambuslang	Erskine	Queenslie	Faskine/Woodhall
Cardonald Park	Erskine Riverside	Raith Interchange	Junction 5 M77/A726
Clydebank Business Park	Faulds Park	Righead/Bellshill/Strathclyde Business Park	Pollock /Ryat
College Business Park	Former Lanarkshire EZ sites (excl Tannochside)	Robroyston South	Vale of Leven Ind Est/Kilmalid
Westerhill			

Map 9 Locations recommended to be Safeguarded in Local Development Plans

Locations to be safeguarded in Local Development Plans



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Scale: 1:240,000

4.6 The Topic Group Recommended Preferred Option in MIR

The Topic Group Recommended Preferred Option List:- 18 High Level Locations which support by role and function the Key Sectors and Growth Sectors and best fit with the Strategy and with a high likelihood of being delivered. A focus was on the network of strategic economic locations either to be safeguarded (6 locations) or which were opportunity locations (12 locations) based strictly upon strategic role and function. Identified by the Topic Group as those locations which exhibit strategic role and function characteristics by their contribution to –the Governments Key Sectors, Scottish Enterprise’s Key Sectoral Locational Priorities, the promotion of the growth sectors identified in Oxford Economics Report. Refining the opportunity locations by a risk analysis based on the locations “Fit with Strategy” and on the barriers, uncertainties and timescale for delivery. This was the recommended 18 locations which were presented for consultation in the Main Issues Report in October/ November 2010.

Figure 22 Topic Group Recommended Preferred Option in MIR

Strategic Economic Investment Locations (SEILs)– 18 Locations Recommended by Topic Group for inclusion into MIR	
Hamilton International Technology Park	Clydebank Riverside
Hillington/Renfrew North	Inverclyde Riverside
Pacific Quay	Gartcosh
Peel Park North	Ravenscraig
Scottish Enterprise Technology Park	Glasgow Airport Zone
West of Scotland Science Park	Robroyston
Bishopton	Poniel
City Science	Eurocentral
Clyde Gateway	International Financial Services District (IFSD)

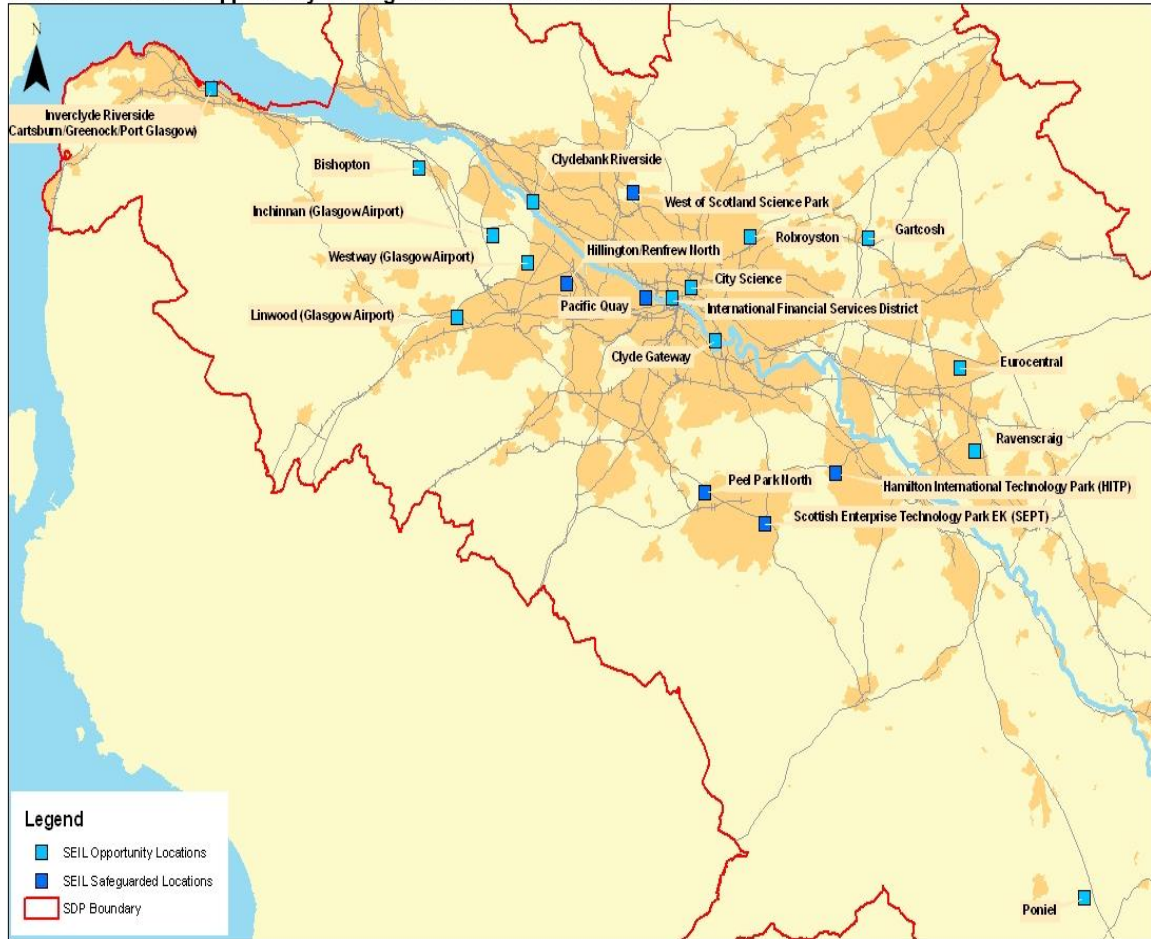
Key

Safeguarded Location
Opportunity Location

Map 10

Topic Groups Recommended Preferred Final SEILs Map for inclusion into MIR

Recommended Final Opportunity & Safeguarded Locations for Inclusion in SDP



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Scale: 1:250,000

Figure 23 Topic Groups Recommended Preferred List of SEILs for inclusion in MIR showing Recommended Role and Function Sectors

Location	Name	Sector	Safeguarded/ Opportunity
Bishopton	Bishopton	Business and Financial Services	Opportunity
City Centre	City Science	Green Technologies	Opportunity
	International Financial Service District	Business and Financial Services	Opportunity
Clyde Gateway	Clyde Gateway	Business and Financial Services/ Distribution and Logistics	Opportunity
Clyde Waterfront	Pacific Quay	Creative and Digital Industries/Tourism	Safeguarded
	Clydebank Riverside	Business and Financial Services/ Life Sciences	Opportunity
	Inverclyde Riverside	Green Technologies	Opportunity
	Hillington/Renfrew North	Business and Financial Services/ Distribution and Logistics	Safeguarded
East Kilbride	Scottish Enterprise Technology Park (SETP)	Life Sciences/Creative and Digital Industries/Green Technologies (R&D)	Safeguarded
	Peel Park North	Life Sciences/Creative and Digital Industries	Safeguarded
Glasgow East	Robroyston	Business and Financial Services	Opportunity
Glasgow International Airport	Glasgow International Airport Zone (3 sites)	Business and Financial Services /Distribution and Logistics/Life Sciences/Green Technologies	Opportunity
Glasgow West	West of Scotland Science	Life Sciences/Green Technologies	Safeguarded
Hamilton	Hamilton International Technology Park	Business and Financial Services/Life Sciences/Creative and Digital Industries	Safeguarded
M8 Corridor	Eurocentral	Distribution and Logistics	Opportunity
M74 Corridor	Poniel	Distribution and Logistics	Opportunity
North Lanarkshire	Gartcosh	Business and Financial Services	Opportunity
	Ravenscraig	Business and Financial Services/Construction	Opportunity

5.0 International Transport Facilities

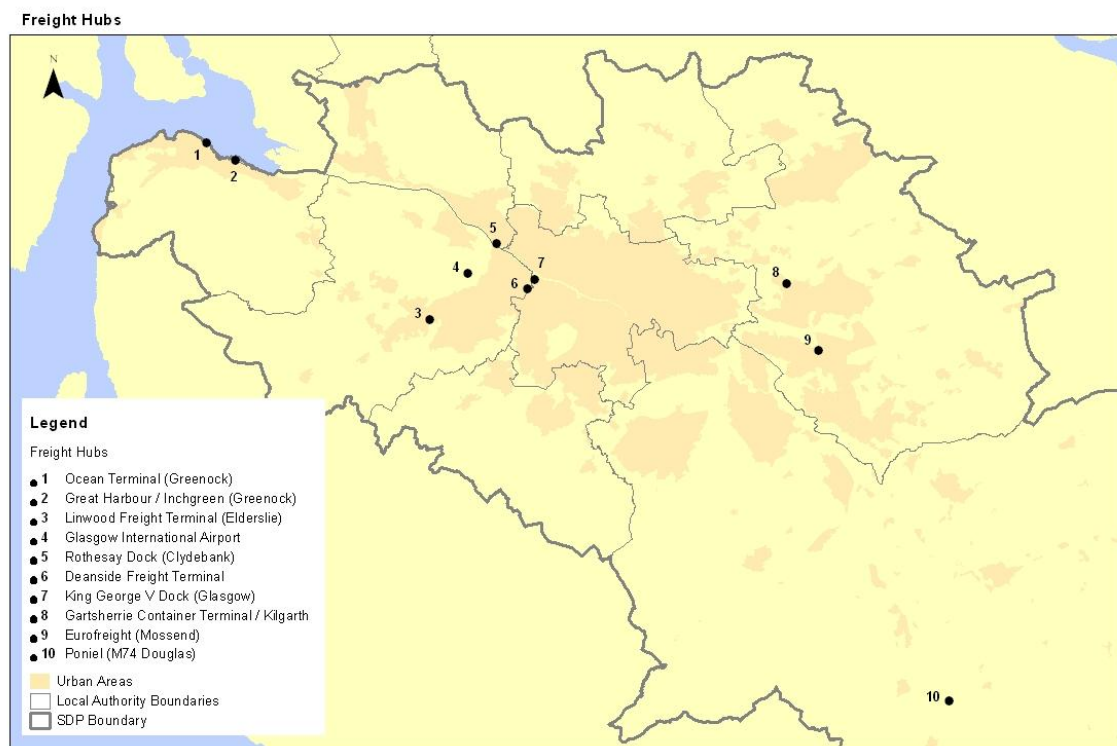
The Glasgow and Clyde Valley Structure Plan also identified the following locations as International Transport Facilities.

International Transport Facilities

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

The Topic Group also assessment International Transport Facilities and concluded that the SDP should continue to list the locations to be safeguarded. The Topic Group recommended that the locations to be identified should include those already in the above schedule plus the freight distribution location at Poniel on the M74 near Douglas. These locations were included in the list of ITF's for consultation in the MIR. Following the MIR consultation Renfrewshire Council sought that the rail freight depot at Linwood (Elderslie) be considered as a strategic freight location.

Map 11 List of Potential Freight Transport Hubs



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6.0 Representations from the Main Issues Report Consultation

6.1 Lomondgate Inclusion

As part of the Main Issues Report consultation process representations were received from West Dunbartonshire Council seeking that the Lomondgate location be included within the Schedule of Strategic Economic Investment Locations within the role and function sectors of Business and Financial Services / Creative and Digital Industries and Tourism. The site was classified as an Opportunity location.

The Joint Committee recognised the role and function of the sectors being promoted on the Lomondgate location and also recognised that there were distinct strategic issues along the Strathleven Corridor of regeneration, economic activity, environmental quality including flooding and the quality of the offer for tourism. The inclusion of the Lomondgate location as a SEIL and the proposals for the Lomond Canal would assist in addressing these issues.

The Joint Committee approved the inclusion of Lomondgate into the final Schedule of Strategic Economic Investment Locations for inclusion in the SDP.

6.2 Glasgow City Centre Inclusion

As part of the Main Issues Report consultation process representations were received from Glasgow City Council seeking that Glasgow City Centre location be included within the Schedule of Strategic Economic Investment Locations within the role and function of Business and Financial Services and Green Technologies. The site was classified as both a Safeguarded and as an Opportunity location.

The Joint Committee recognised that Glasgow City Centre is the core of the city-region and the city-regions principal economic driver. With high regional employment concentrations, a 60% journey to work catchment, key sector economic development quarters – City Science and IFSD, education resources, tourism and cultural roles, retail role, administration and Government roles and the centrality and accessibility as a public transport hub. The Joint Committee recognised that this multi- purpose economic role should also be safeguarded and promoted. The Joint Committee approved the City Centre location for inclusion into the final Schedule of Strategic Economic Investment Locations.

7.0 Key Strategic Economic Investment Locations (Final SEILs)

In terms of establishing a spatial framework to improve the economic competitiveness of the city-region and also In terms of supporting a rebalanced low carbon economy for the city-region with its focus on key existing and new economic sectors this Report identifies a priority set of key locations - Strategic Economic Investment Locations (SEILs), based upon their ability to offer specific roles and functions within the new rebalanced economy.

The primary SEIL is Glasgow City Centre and its surrounding areas with their employment districts, University campuses, related research and development, cultural quarters, and emerging new green technology focus. The City Centres 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.

These SEILs have been selected to support the Scottish Government's key sectors, Scottish Enterprise locational priorities and the growth in rebalancing economic sectors.

Selection has also responded to representations made following the MIR consultation process. As strategic priorities, they best reflect the need for sustainable locations to address long-term drivers of change. The SELs package of key strategic locations focused on the future key economic sectors but does not preclude other economic activity sites being promoted and developed through Local Development Plans in response to local requirements.

However, the Local Development Plan process will also require to ensure that measures are put in place to safeguard current locations and to ensure their ability to respond to their defined role and function as set out in the key sector column of the Schedule.

Equally, the opportunity locations require promotion for investment based upon their defined role and function, with subsequent safeguarding in Local Development Plans for the uses set out in the key sectors column of the Schedule.

7.1 Schedule of Strategic Economic Investment Locations for inclusion in SDP

The Strategic Economic Investment Locations are set out in the following Schedule and comprise the city-region's strategic response to long-term sustainable economic growth.(See Map 12 for locations).

Figure 24 Strategic Economic Investment Locations Schedule

Schedule of Strategic Economic Investment locations		
Location	Key Sectors: Dominant Role and Function	Status
Glasgow City Centre (and surrounding areas)	Business and Financial Services / Green Technologies,	Safeguarded / Opportunity
City Science	Green Technologies	Opportunity
International Financial Service District (IFSD)	Business and Financial Services	Opportunity
Pacific Quay	Creative and Digital Industries / Tourism	Safeguarded
Clyde Gateway	Business and Financial Services / Distribution and Logistics	Opportunity
Bishopton	Business and Financial Services	Opportunity
Clydebank Riverside	Business and Financial Services / Life Sciences	Opportunity
Inverclyde Waterfront	Green Technologies / Business and Financial Services	Opportunity
Hillington / Renfrew North	Business and Financial Services / Distribution and Logistics	Safeguarded
Scottish Enterprise Technology Park (SETP)	Life Sciences / Creative and Digital Industries / Green Technologies (R&D)	Safeguarded
Peel Park North	Life Sciences/Creative and Digital Industries	Safeguarded

Robroyston	Business and Financial Services	Opportunity
Glasgow International Airport Zone (Airport plus 3 sites) *	Business and Financial Services / Distribution and Logistics / Life Sciences / Green Technologies	Opportunity
West of Scotland Science Park	Life Sciences / Green Technologies	Safeguarded
Hamilton International Technology Park	Business and Financial Services / Life Sciences / Creative and Digital Industries	Safeguarded
Ravenscraig	Business and Financial Services / Construction	Opportunity
Gartcosh	Business and Financial Services	Opportunity
Eurocentral	Distribution and Logistics	Opportunity
Poniel	Distribution and Logistics	Opportunity
Lomondgate	Business and Financial Services / Creative and Digital Industries / Tourism	Opportunity

* Safeguarded: existing location: Opportunity: new location For more detail, refer Paragraph 4.3 Page 40

* The future of the GIA's longer-term development will be secured through its own masterplan, and related economic activity through delivery of the three SEILs located around the airport.

8.0 Strategic Freight Transport Hubs

The Glasgow and Clyde Valley Structure Plan identified a number of strategic locations as International Transport Facilities. It was recognized that the movement of raw materials, both imports and exports were essential to the competitiveness of the long-term city-region economy and that this required to be achieved as sustainably as possible. Modal shift between road, rail and marine shipping is a key component of sustainable development - there is an 80% reduction in emissions for very tonne of freight moved by rail in comparison to road. In carbon terms, there is therefore an imperative to invest in freight hubs in key locations to enable modal shift to occur.

With a general trend within freight movements is towards larger ships and containers, even where dealing with break bulk, such hubs require locations which maximise access to ports and rail networks and which are capable of taking the increasing scale of freight infrastructure.

Distribution and logistics has been identified as a key growth sector within the city-region economy.

8.1 Strategic Freight Transport Hub Schedule

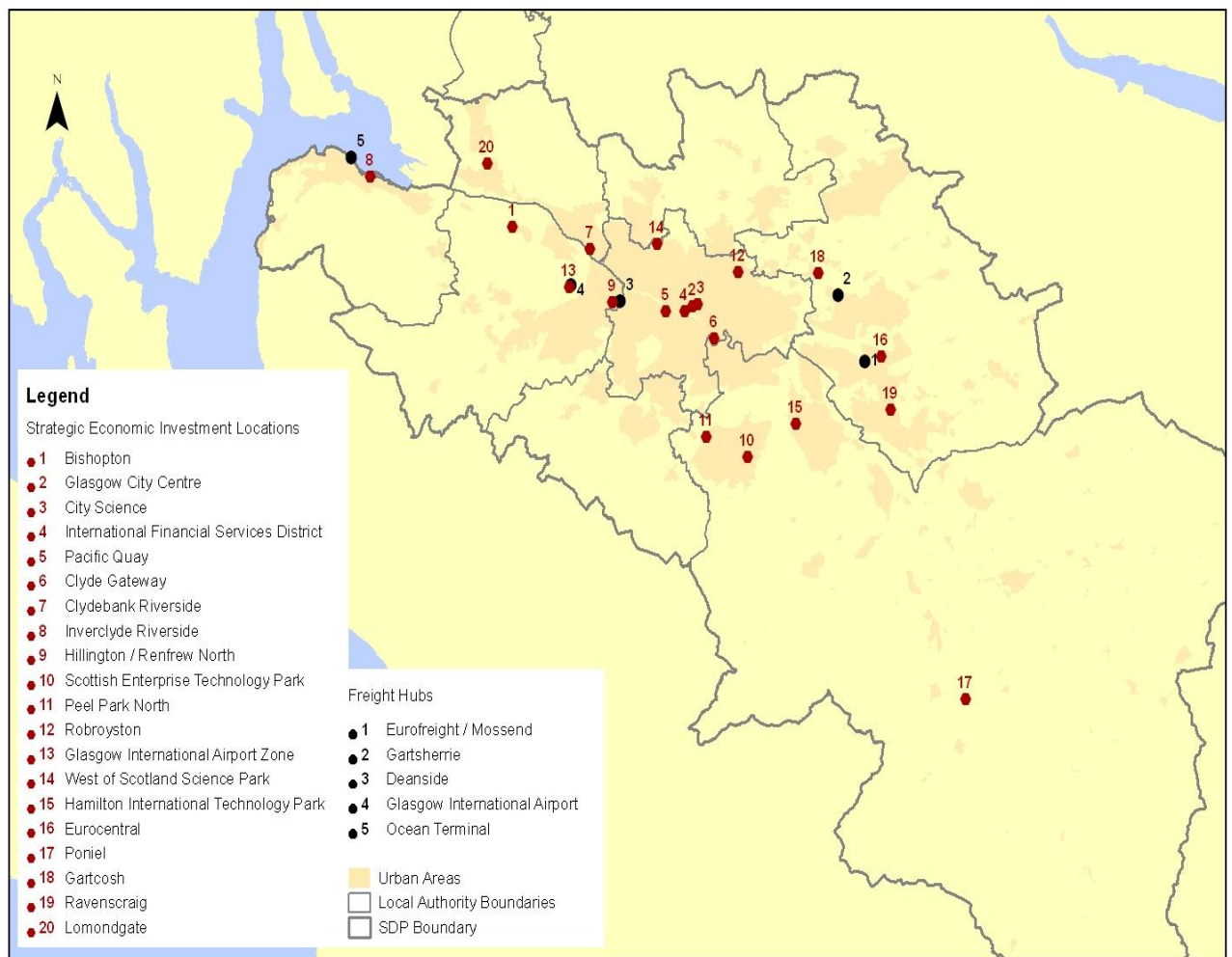
The Strategic Freight Transport Hubs shown in the following Schedule comprise the strategic response to long-term sustainable freight movements into and within the city-region.

Measures require to be put in place to safeguard relevant investment in such locations. Ancillary land allocations adjacent to such facilities, where appropriate, should be designated freight parks and safeguarded solely for the purposes of freight activity, for example, storage, trans-shipment, break-bulk infrastructure and related services.

Figure 25 Schedule Strategic Freight Transport Hubs

Schedule of Strategic freight Transport Hubs		
Strategic Freight Transport Hub	Location	Mode
Eurocentral /Mossend	Mossend, North Lanarkshire	Rail
Gartsherrie	Coatbridge, North Lanarkshire	Road
Deanside	Renfrew , Renfrewshire	Rail
Glasgow International Airport	Paisley, Renfrewshire	Air
Ocean Terminal	Greenock, Inverclyde	Sea

Map 12 Final List of SEILs and Freight Transport Hubs for inclusion in SDP



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APPENDICE

Definition of Marketable Land

The marketable industrial and business land supply is made up of sites which are defined as:

1. Designated for industrial, business and storage or 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.

Definition of Quality Land

The quality land supply is that element of the marketable industrial and business land supply which is assessed as offering a good environment, good access to the strategic transport network and a high degree of flexibility in terms of the range of different user requirements which it can accommodate. The quality land supply is the most competitive industrial and business land in the Structure Plan area and is therefore central to the success of the Competitive Economic Framework.

The Role and Function of the Proposed Strategic Economic Investment Locations within the SDP proposed by Local Authorities

Role and Function of Proposed SEILs

Opportunity Locations	Authority	Role and Function within SDP
Bishopton	RC	<p>OPPORTUNITY SITE. 43 ha of industrial/business land has been approved as part of Bishopton CGA. Not a locational priority for SE.</p> <p>Bishopton CGA is considered a location which could promote the growth sectors identified within the OE's report, primarily the Business Services Sector.</p> <p>It is recognised in NPF 2 that good transport connections make Bishopton the preferred location for long-term expansion to the west of Glasgow. The development of 138,000sqm of Bus/ind floorspace approved as part of the masterplan is key to the delivery of the Community Growth Area. There is an opportunity to develop a high quality and highly accessible business park</p>

		that is well located to promote growth within the business services sector.
Glasgow City Centre	GCC	<p>City Science</p> <p>OPPORTUNITY SITE. City Science Site is important strategic element divided off from College Grounds site. This is a national priority for Business Services (Science/R&D) - Energy.</p> <p>International Technology, Renewables & Energy Zone (ITREZ).</p> <p>This is a 5 acre site adjacent to the University of Strathclyde and bounded by Ingram Street, George Street, High Street and Albion Street. The current ITREZ components comprise 32,000 sq m of space comprising 22,000 sq m UofS Technology innovation Centre, an SSE 5,000 sq m Centre of Design for Offshore Wind and a speculative office component of 5,000 sq m.</p> <p>It has been masterplanned as an inner city science development for science and technology companies. The site is being developed to help secure competitive advantage for Scotland in the renewables market and establish Scotland as an internationally recognized location for research, development, design and engineering of renewables and a range of associated enabling technologies.</p>
Clyde Gateway	GCC/SLC	<p>OPPORTUNITY SITE.. This is a national regeneration priority for the Govt. Major demolition and redevelopment proposed to create 188,000sq m office, 105,600 sq m industrial and 15,000 sq m commercial floorspace within the Shawfield area of South Lanarkshire by 2032. Target sectors (oxford economics)- Business Services</p> <p>Business Services</p> <p>The project will economically transform 2000 acres in the East End of Glasgow and neighbouring parts of South Lanarkshire. Developments include a 5 mile extension of the M74, construction of a new East End Regeneration Route, infrastructure and buildings for the commonwealth games include a sports arena, cycling veladroma, and an Athletes village, which post games, will become a waterfront housing neighbourhood for the East End of Glasgow</p>
Clydebank Riverside	WDC	<p>OPPORTUNITY SITE. Comprises two relatively small sites: Clyde Gate & Queens Quay/Cart Street. Not a key sector locational priority for SE, but SE does have an interest through their involvement in the URC.</p> <p>Clyde Gate (2.85 ha) is undeveloped but has permission for office development on part of the site while Queens Quay – an ‘Enterprise and Learning District’ (2.99 ha) – is partly developed with erection of the new Clydebank College, Titan Enterprise Centre & Aurora House, offering quality and competitively-priced small office accommodation targeted at start-ups and expanding young companies. Infrastructure for the completion of both sites is in place.</p> <p>Clydebank re-built has developed an ambitious long term vision for regeneration which sets out a detailed programme to rejuvenate nearly 170 acres with the focal point being the town's Titan Crane, including the town centre, Carless and Queens Quay</p> <p>High Technology/Science Parks - Business Services, Financial Services, Health (Life Science)</p>
Eurocentral South		<p>OPPOURTUNITY SITE</p> <p>Eurocentral South offers a superb range of opportunities for a variety of class 5 and 6 uses. The site is ideally located, with its own dedicated M8 junction and access to the Mossend Railfreight Terminal.</p> <p>Eurocentral South is a key opportunity for the Distribution growth sector identified by Scottish Enterprise with substantial serviced plots available and a number of high profile occupiers in the sector present including TDG, DHL & City Link.</p> <p>The site also provides opportunities for manufacturing and training facilities with Newsprinters Ltd and LAGTA key occupiers in this regard.</p> <p>General industrial business areas – Distribution.</p>

Gartcosh	NLC	<p>OPPORTUNITY SITE. Extensive large scale opportunity for variety of sectors/users.</p> <p>Work has commenced on a national Crime Campus which will bring together on one site the key Scottish Crime Enforcement Agencies. There is considerable scope for Business Services linked to this development.</p> <p>Planning permission has also been granted (2008) for a major high tech manufacturing facility making ink jet cartridges.</p> <p>Rail and road transport links are strong at this location which is adjacent to the Gartcosh - Glenboig CGA.</p> <p>Not a key sector locational priority although SE has property interests at this location.</p> <p>Research and technology / science parks</p>
Glasgow Airport (3 sites)	RC	<p>OPPORTUNITY SITE. This location benefits from being in close proximity to the airport. It is envisaged that the sum of the sites would create a strategic airport employment zone which could be targeted at a number of different sectors. Given the accessibility of this zone it is considered that there is an opportunity to further promote development of the business services growth sector of which there are a number of recent examples. In addition to the opportunity provided at this location there are a number of businesses that are located within this zone which contribute to the key growth sectors identified within the OE's report (For Example - Distribution Sector - WH Malcolm, Linwood and KWE, Westway & Health Sector - Life Technologies Ltd and Vascutek, Inchinnan). It should also be noted that Doosan Babcock, Rolls Royce, Invetech, Strathclyde University Advanced Forming Research Centre, WM Tracey, Aggreko, Invetech and Teknek are among a diversity of well established businesses that are located within this strategic zone.</p> <p>The Airport Masterplan forecast for a growth in passenger numbers to 15 million by 2015 remains a target for BAA even in the current economic climate. The expected growth of the airport will require businesses that are currently located within the airport campus to be relocated to sites in close proximity to the airport. Furthermore, it is recognised in Glasgow Airport's Economic Development Framework that much of the growth at the airport does not require to be accommodated on-site but can be supported by the wider zone (approx 2-3 miles around airport) within which the airport is located. This zone is a key strategic economic development hub in its own right and it is important that there is range of appropriate quality sites to support the expected growth. There are a range of quality, marketable sites within the proposed airport zone. Key locations include the Cart Corridor Area (subject of a joint venture by the Council, RBS and Scottish Enterprise), Inchinnan Business Park, Westway Park, the Existing SIBL at Linwood and the Murray Street Business Area. The Airport Zone provides an appropriate range of sites to support growth, while growth of the airport does present an opportunity to help support the growth of key industries through both supporting existing companies and attracting new ones.</p>
Inverclyde Riverside	IC	<p>OPPORTUNITY SITE. Not a key sector locational priority for SE, but SE does have an interest through the UCA. Riverside Inverclyde is a £400 million public/private sector initiative that is regenerating over four and a half miles of waterfront from Port Glasgow to Greenock. The initiative involves the creation of harbour and marine developments, waterfront apartments, and modern business and industrial space.</p> <p>The Inchgreen Graving Dock/Great Harbour area adjacent to the Riverside Business Park (north of the A8) has been identified by Ri URC (in conjunction with the owners Peel Holdings (Clydeport)) as a location for promoting some forms of 'green energy'/ renewables manufacturing.</p> <p>Discussions are ongoing with our Service/Council on this and this is one of the key growth sectors identified by the Scottish Government/SE</p>
Poniel (New Site)	SLC	<p>OPPORTUNITY SITE. 75Ha. New Location. Not currently a SIBL. Not a locational priority for SE.</p> <p>Outline consent for mixed use 2005. Bonded warehouse use established on part of site 2009. New application ppip 2010 for mixed use development on</p>

		<p>larger site. This general location would be suitable for warehousing/distribution uses which are projected to increase in South Lanarkshire.</p> <p>Target sectors (Oxford Economics)- Distribution.</p>
Ravenscraig	NLC	<p>OPPORTUNITY SITE. This is a regional regeneration priority for the Scottish Government through NPF2. SE is also key partner in the Ravenscraig Ltd partnership.</p> <p>Ravenscraig is a project to regenerate the former steelworks site. Development will include a new town, retail and leisure space, business and industrial space, parkland areas, sports facilities, a new college campus, schools and transport links.</p> <p>Development supports four key SE expansion sectors. A modern business quarter is planned, providing opportunities for both Financial and Business Services. A hotel is also planned complementing the new town centre.</p> <p>The forthcoming BRE park would provide a basis for Ravenscraig as a centre of sustainable construction, especially considering the New Town element of the development and the linkages of with local firms. In addition to its role as an SE growth sector, Oxford Economics predict a recovery in construction in the 2010's.</p>
Robroyston	GCC	<p>OPPORTUNITY SITE.</p> <p>Not a key sector locational priority although SE has property interests at this location.</p> <p>R&D/High Quality Business Park - Business Services</p>
Clyde Waterfront International Financial Services District	GCC	<p>OPPORTUNITY SITE.</p> <p>This is a national regeneration priority for the Govt. SE has a specific interest in the IFSD as a world class business location for financial services and supportive activity.</p> <p>Key Sectors - Business and Financial Services</p>

Safeguarded Locations	Authority	
Pacific Quay	GCC	<p>SAFEGUARDED SITE. This is a national priority for SE. Creative Industries (specifically Digital Media including broadcasting, content & supportive technologies).</p> <p>Creative Clyde encapsulates Pacific Quay which is being developed as a National / International hub for the Digital Media sector and Queens Dock 2 (Scottish Exhibition & Conference Centre campus) which supports Tourism (both Leisure & Business sub-sectors).</p>
West of Scotland Science Park	GCC	<p>SAFEGUARDED SITE. This is a national priority for SE. Life Sciences</p> <p>(Also supports other key sectors including Enabling Technologies, Energy & Renewables) The site is a location for development of businesses focusing on emerging and future technologies primarily in the life sciences sector.</p>
Hillington/Renfrew North	GCC/RC	<p>SAFEGUARDED SITE. Hillington site plus some industry /business sites in Renfrew North (CEDA) Not a locational priority for SE.</p> <p>Warehouse/Distribution Park & High Quality Business SpaceContributes to a number of key growth sectors identified within the Oxford Economics report. Hillington Park is Scotland's largest business park & industrial estate. The business park is strategically located in the M8 corridor between Glasgow City Centre and Glasgow International Airport and is easily accessible by public transport (two railway stations within the park). Hillington and Renfrew North promote the Business Services, Distribution and Construction Sectors. Business Services Sector - there is a</p>

		significant amount of high quality, accessible office space within this location (including the award winning innovation centre and the Titanium business park). In addition, Hillington has around 20 ha of quality land available. 375,000 sqft of grade A office space has been granted planning permission at Hillington frontage. The Deanside Freight Terminal is within this location. Distribution Sector. This terminal is safeguarded as an International Transport Facility within the Structure Plan and is considered to be a strategic facility that requires safeguarding. Construction Sector - Hillington offers a variety of premises that suit the needs of a diversity of businesses. There are a considerable amount of premises within this location which provide yard space and are occupied by construction companies. There is also vacant land and premises which could be re-developed to support growth within this sector.
Scottish Enterprise Technology Park East Kilbride (SETP)	SLC	SAFEGUARDED SITE. 5.26Ha Largely developed although has been subject to some demolition of obsolete units creating small scale development opportunities. Research/technology park. Not a key sector locational priority although SE has property interests at this location. Key sectors occupying site - life sciences, creative industries, energy., R and D
Hamilton International Technology Park (HITP)	SLC	SAFEGUARDED SITE. 3.8Ha. High quality business park environment. Largely developed. Limited opportunity for future expansion. Not a locational priority for SE. Key sectors occupying site - Life sciences, finance/business services, creative industries.
Peel Park North	SLC	SAFEGUARDED SITE. 5.3Ha (North Section of site only).The northern section of Peel Park including the GSO business park is a high quality business park environment. There is opportunity for further development of GSO business park. Key sectors occupying site - Life Sciences/Creative and Digital Industries

Criteria Spreadsheet Data

Basic Data

SIBL NO.	UNITARY	SIBL	AREA	Total SIBL Area (Ha)	% Available	Marketable Land %	Quality %	Total Take Up since 2004/05
1	ER	BARRHEAD	26.98	55.21	48.86	68.56	Zero	ZERO
2	ED	Westerhill	20.81	30.10	69.13	100	Zero	3.90
3	SL	Clyde Gateway	12.65	43.38	29.16	56.9	19.36	3.7
4	SL	Cambuslang	10.76	28.27	38.06	100	100	4.13
5A	SL	EK South and West (Peel Park north)	5.30	36.00	14.70		100	0
5b	SL	EK South and West (Peel Park south)	21.25	30.00	70.80			1.57
5c	SL	EK South and West (Langlands Park)	13.1	42.00	31.20	93.9	100	10.02
5d	SL	EK South and West (SE Tech Park SETP)	5.26	27.00	19.50	100	100	1.69
5	SL	EK South and West (ALL)	44.91	125.00	35.92	100	100	13.28
6	SL	Larkhall South	29.12	55.88	52.11	77.09	77.1	10.79
7A	SL	Blantyre/Whistleberry (Hamilton Technology Park)	3.8	68.00	5.58	47.36	100	3.51
7B	SL	Blantyre/Whistleberry (Craighead School)	6.2	39.00	15.89	61.29	100	Zero
7	SL	Blantyre/Whistleberry (ALL)	10.00	107.00	9.34	23.14	76.86	0.93
8	IC	CARTSBURN SIBL (linked to Riverside SIBL)	2.08	16.37	12.7	79.32	79.32	1.65
9	IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	1.46	8.45	17.27	100	Zero	1.83
10	IC	Faulds Park SIBL	0	30.99	0			Zero
11	GCC	West of Scotland Science Park	2.03	32.77	6.19	100	100	0.70
12	GCC	Robroyston	21.10	27.23	77.48	100 (76.31)	100	2.76
13	GCC	Clyde Gateway	2.96	63.58	4.63	100	Zero	3.70
14	GCC	Queenslie	7.80	94.76	8.22	100	100	7.86
15	GCC	Cambuslang	15.90	117.76	13.49	100	24.72	?
16	GCC	Glasgow Business Park	14.32	32.74	43.73	100	100	2.16
17	GCC	Pacific Quay	9.67	20.13	48.03	100	100	4.82
18	GCC	Hillington/Cardonald	7.87	70.13	11.22	88.19	100	7.76
19	GCC	Darnley Mains	31.35	31.63	99.08	100 (84.05)	100	Zero
20	GCC	City Science/College Business Park	3.74	7.09	48.51	100	zero	Zero
21	RC	Erskine Riverfront	23.05	48.26	59.36	100	94.1	ZERO
22	RC	Hillington IE	19.30	155.00	12.27	94.10	94.1	13.17
23	RC	Inchinnan (Glasgow Airport)	14.00	98.07	14.47	73.3	74.3	1.98
24	RC	Linwood Glasgow Airport)	45.30	127.17	30.33	100	71	7.7
25	RC	Westway (Glasgow Airport)	13.80	55.75	12.1	100	100	ZERO
26	WD	Clydebank Riverside	4.81	5.84	82.36	100	100	Zero
27	WD	Vale of Leven IE	29.85	103.13	28.94	76.61	24.28	Zero
28	WD	Clydebank Business Park	2.77	35.24	7.8	100	100	Zero
29	NL	LANARKSHIRE EZ - CALDER	0.51	13.93	3.66	Zero	Zero	
30	NL	LANARKSHIRE EZ - AIRBLES	0.52	4.31	12.06	Zero	Zero	
31	NL	LANARKSHIRE EZ - DUNALISTER	5.79	7.91	73.19	16.06	16.06	
32	NL	Mossend EZ -NEWHOUSE/EUROCENTRAL 2009	8.24	92.37	8.92	100	100	

33	NL	Lanarkshire EZ - Excelsior	zero	19.05	Zero	Zero	Zero	
34	NL	Lanarkshire EZ - Shawhead	zero	6.65	Zero	Zero	Zero	
35	NL	LANARKSHIRE EZ - TANNOCHSIDE	0.84	35.82	2.34	100	100	Total 34.64
36	NL	CUMBERNAULD NW	37.21	269.83	13.79	83.39	81.05	7.69
37	NL	GARTCOSH	54.95	63.62	86.37	100	100	1.6
38	NL	NEWHOUSE/EUROCENTRAL	178.20	446.21	38.08	99.82	99.82	16.08
39	NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	20.53	189.85	10.81	82.31	80.41	2.74
40	NL	RAVENSCRAIG	84.99	84.99	100.00	100	100	7.99

41	SL	LANGLANDS WEST SHAL	85.00			100	100	Zero
42	SL	RAITH SHAL	87.00					Zero
43	GCC	Robroyston SHAL	5.00					
44	NLC	Faskin/Woodhall SHAL						
45	ERC	Pollock/Ryat SHAL	6.00	57.70	10.39	Zero	Zero	ZERO

46	GCC	Darnley Mains (Regionally Important)	5.00					
47	RC	ERSKINE (Regionally Important)						

48	RC	BISHOPTON(Potential New Strategic Location)						
49	NLC	Wardpark (Potential New Strategic Location)						
51	SLC	Poniel (Potential New Strategic Location)	tbc	tbc				
52	GCC	Clyde Waterfront International Financial Services District						
53	ERC	M77/A726 Strategic Transportation Node						

Accessibility Scores

SIBL NO.	UNITARY	SIBL	SITLUM Accessibility Score 2008	Rank 2008	Score 2014	Rank 2014	Score 2021	Rank 2021	Is there a Travel Plan in place? Y/N
1	ER	BARRHEAD	59	2	58	2	55	2	NO
2	ED	Westerhill	141	4	137	4	136	4	NO
3	SL	Clyde Gateway	11	1	11	1	10	1	NO
4	SL	Cambuslang	42	1	44	2	48	2	NO?
5A	SL	EK South and West (Peel Park north)	154	4	150	4	150	4	No?
5b	SL	EK South and West (Peel Park south)	154	4	150	4	150	4	No?
5c	SL	EK South and West (Langlands Park)	149	4	144	4	149	4	No?
5d	SL	EK South and West (SE Tech Park SETP)	137	4	134	4	134	4	NO?
5	SL	EK South and West (ALL)	137	4	134	4	134	4	NO
6	SL	Larkhall South	146	4	145	4	143	4	NO?
7A	SL	Blantyre/Whistleberry (Hamilton Technology Park)	68	2	65	2	66	2	Yes?
7B	SL	Blantyre/Whistleberry (Craighead School)	102	3	99	3	98	3	NO?
7	SL	Blantyre/Whistleberry (ALL)	68	2	65	2	66	2	
8	IC	CARTSBURN SIBL (linked to Riverside SIBL)	161	5	158	5	155	4	NO
9	IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	161	5	158	5	155	4	NO
10	IC	Faulds Park SIBL	192	5	192	5	192	5	NO

11	GCC	West of Scotland Science Park	52	2	51	2	52	2	NO
12	GCC	Robroyston	106	3	99	3	102	3	NO
13	GCC	Clyde Gateway	10	1	10	1	11	1	NO
14	GCC	Queenslie	54	2	51	2	52	2	NO
15	GCC	Cambuslang	42	1	44	2	48	2	NO
16	GCC	Glasgow Business Park	80	3	77	2	74	2	NO
17	GCC	Pacific Quay	28	1	28	1	27	1	NO
18	GCC	Hillington/Cardonald	31	1	38	1	36	1	NO
19	GCC	Darnley Mains	55	2	55	2	59	2	NO
20	GCC	City Science/College Business Park	3	1	3	1	3	1	NO
21	RC	Erskine Riverfront	68	2	71	2	73	2	NO
22	RC	Hillington IE	110	3	112	3	111	3	YES
23	RC	Inchinnan (Glasgow Airport)	47	2	50	2	51	2	NO
24	RC	Linwood Glasgow Airport)	89	3	95	3	95	3	No -
25	RC	Westway (Glasgow Airport)	27	1	30	1	29	1	No -
26	WD	Clydebank Riverside	No Score						NO
27	WD	Vale of Leven IE	180	5	178	5	183	5	Unknown
28	WD	Clydebank Business Park	82	3	79	3	77	3	Unknown
29	NL	LANARKSHIRE EZ - CALDER	128	4	124	4	124	4	Unknown
30	NL	LANARKSHIRE EZ - AIRBLES	65	2	109	3	111	3	Unknown
31	NL	LANARKSHIRE EZ - DUNALISTER	140	4	157	4	158	5	Unknown
32	NL	Mossend EZ -NEWHOUSE/EUROCENTRAL 2009	183	5	183	5	183	5	Unknown
33	NL	Lanarkshire EZ - Excelsior	119	4	129	4	129	4	Unknown
34	NL	Lanarkshire EZ - Shawhead	100	3	90	3	90	3	Unknown
35	NL	LANARKSHIRE EZ - TANNOCHSIDE	23	1	22	1	22	1	Unknown
36	NL	CUMBERNAULD NW	161	5	157	4	158	5	Unknown
37	NL	GARTCOSH	163	5	162	5	161	5	Unknown
38	NL	NEWHOUSE/EUROCENTRAL	156	4	176	5	177	5	Unknown
39	NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	31	1	28	1	29	1	Unknown
40	NL	RAVENSCRAIG	not scored						Unknown

41	SL	LANGLANDS WEST SHAL	Not Scored						NO?
42	SL	RAITH SHAL	Not Scored (See Langlands)						NO?
43	GCC	Robroyston SHAL							
44	NLC	Faskin/Woodhall SHAL							
45	ERC	Pollock/Ryat SHAL	Not Scored						NO

Role and Function Criteria

UNITARY	SIBL	Identified by Scottish Executive as Priority Location? Y/N	Type of SIBL site (See Tab Type of Site)	Does the SIBL have no or limited opportunities for further development? Y/N (See column I)	Does the SIBL contribute to the Strategic Regeneration Areas? Y/N (See Tab)
ER	BARRHEAD	NO	General Industry/Business Areas	NO	NO
ED	Westerhill	NO	General Industry/Business Areas	NO	NO
SL	Clyde Gateway	YES	general industrial/business areas	No	YES
SL	Cambuslang	NO	warehouse/distribution park	No	No
SL	EK South and West (Peel Park north)	NO	high quality business park	No	No
SL	EK South and West (Peel Park south)	No	general industrial/business area	No	No
SL	EK South and West (Langlands Park)	NO	general industrial/business area	No	No
SL	EK South and West (SE Tech Park SETP)	No	research/technology park	No	No
SL	EK South and West (ALL)	NO			
SL	Larkhall South	NO	general industrial/business areas	No	No
SL	Blantyre/Whistleberry (Hamilton Technology Park)	NO	high quality business park		NO
SL	Blantyre/Whistleberry (Craighead School)	NO	general industrial/business areas	YES	NO
SL	Blantyre/Whistleberry (ALL)	NO			
IC	CARTSBURN SIBL (linked to Riverside SIBL)	NO	Incubator/SME Cluster Sites	YES	YES
IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	YES	Research and Technology/Science Parks	NO	YES
IC	Faulds Park SIBL	NO	High Quality Business Parks	YES	NO
GCC	West of Scotland Science Park	YES	Research and Development	Limited	NO
GCC	Robroyston	YES	R&D/High Quality Business Park	YES	NO
GCC	Clyde Gateway	YES	General Industry/Business	YES	YES
GCC	Queenslie	NO	General Industry/Business	YES	NO

GCC	Cambuslang	NO	General Industry/ Business	YES	YES
GCC	Glasgow Business Park	NO	General Industry/ Business	YES	NO
GCC	Pacific Quay	YES	Creative Industries	YES	YES
GCC	Hillington/Cardonald	NO	General Industry/ Business	YES	YES
GCC	Darnley Mains	NO	High Quality Business Park	YES	NO
GCC	City Science/College Business Park	YES	R&D/ Office Location	Limited	YES
RC	Erskine Riverfront	NO	Potential Office Location / High Quality Business Park	NO	Yes
RC	Hillington IE	NO	Warehouse/Distri bution Park & High Quality Business Space	No - land available & redevelopment/re furbishment opp	Yes?
RC	Inchinnan (Glasgow Airport)	NO	High Quality Business Park	No - land available & redevelopment/re furbishment opp	Yes?
RC	Linwood Glasgow Airport)	NO	Warehouse/Distri bution Park & Established Business Location - Potential High Quality Buisness Park	NO	NO
RC	Westway (Glasgow Airport)	NO	Warehouse/Distri bution Park & High Quality Business Space	No - land available & redevelopment/re furbishment opp	Yes?
WD	Clydebank Riverside	NO	High Technology/Scie nce Parks	No it does have opportunities.	Yes
WD	Vale of Leven IE	NO	General Industrial/Busine ss Areas	No it does have opportunitites	yes
WD	Clydebank Business Park	NO	General Industrial/Busine ss Area	Yes minimal area	Yes
NL	LANARKSHIRE EZ - CALDER	No	General industrial business areas	YES	NO
NL	LANARKSHIRE EZ - AIRBLES	No	General industrial business areas	YES	YES
NL	LANARKSHIRE EZ - DUNALISTER	No	General industrial business areas	NO	NO
NL	Mossend EZ - NEWHOUSE/EUROCENTRAL 2009	No	General industrial business areas	NO	NO
NL	Lanarkshire EZ - Excelsior	No	General industrial business areas	YES	NO
NL	Lanarkshire EZ - Shawhead	No	General industrial business areas	YES	NO
NL	LANARKSHIRE EZ - TANNOCHSIDE	No	General industrial business areas	YES	NO
NL	CUMBERNAULD NW	No	General industrial business areas	NO	NO
NL	GARTCOSH	YES	Research and technology /	NO	NO

		science parks			
NL	NEWHOUSE/EUROCENTRAL	No	General industrial business areas	NO	NO
NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	No	High quality business parks	NO	NO
NL	RAVENSCRAIG	YES	High quality business parks	NO	YES

SL	LANGLANDS WEST SHAL	No	former SHAL	NO	No
SL	RAITH SHAL	No	former SHAL	NO	No
GCC	Robroyston SHAL	former SHAL			
NLC	Faskin/Woodhall SHAL				
ERC	Pollock/Ryat SHAL	SE - NO CHANGE TO THESE LOCATIONS - MAY REQUIRE REVIEW AT LATER DATE	HIGH QUALITY BUSINESS PARK	NO	NO

Scottish Enterprises View on Key Sector Locational Priorities

SIBL NO.	UNITARY	SIBL	Scottish Enterprise View on Key Sector locational Priorities
1	ER	BARRHEAD	Not a locational priority for SE
2	ED	Westerhill	Not a locational priority for SE
3	SL	Clyde Gateway	This is a national regeneration priority for the Govt.
4	SL	Cambuslang	Not a locational priority for SE
5A	SL	EK South and West (Peel Park north)	Not a locational priority for SE.
5b	SL	EK South and West (Peel Park south)	Not a locational priority for SE
5c	SL	EK South and West (Langlands Park)	Not a locational priority for SE.
5d	SL	EK South and West (SE Tech Park SETP)	Not a key sector locational priority although SE has property interests at this location.
5	SL	EK South and West (ALL)	Not a locational priority for SE
6	SL	Larkhall South	Not a locational priority for SE
7A	SL	Blantyre/Whistleberry (Hamilton Technology Park)	Not a locational priority for SE.
7B	SL	Blantyre/Whistleberry (Craighead School)	Not a locational priority for SE.
7	SL	Blantyre/Whistleberry (ALL)	Not a locational priority for SE.
8	IC	CARTSBURN SIBL (linked to Riverside SIBL)	Not a key sector locational priority for SE, but SE does have an interest through their involvement in the URC
9	IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	Not a key sector locational priority for SE, but SE does have an interest through their involvement in the URC
10	IC	Faulds Park SIBL	Not a locational priority for SE
11	GCC	West of Scotland Science Park	Yes-this is a national priority for SE.
12	GCC	Robroyston	Not a key sector locational priority although SE has property interests at this location.
13	GCC	Clyde Gateway	This is a national regeneration priority for the Govt.
14	GCC	Queenslie	Not a locational priority for SE
15	GCC	Cambuslang	Not a locational priority for SE

16	GCC	Glasgow Business Park	Not a locational priority for SE
17	GCC	Pacific Quay	Yes- this is a national priority for SE.
18	GCC	Hillington/Cardonald	Not a locational priority for SE.
19	GCC	Darnley Mains	Not a locational priority for SE.
20	GCC	City Science/College Business Park	Yes-this is a national priority for SE
21	RC	Erskine Riverfront	Not a locational priority for SE
22	RC	Hillington IE	Not a locational priority for SE.
23	RC	Inchinnan (Glasgow Airport)	Not a locational priority for SE
24	RC	Linwood Glasgow Airport)	Not a locational priority for SE.
25	RC	Westway (Glasgow Airport)	Not a locational priority for SE.
26	WD	Clydebank Riverside	Not a key sector locational priority for SE, but SE does have an interest through their involvement in the URC.
27	WD	Vale of Leven IE	Not a locational priority for SE.
28	WD	Clydebank Business Park	Not a key sector locational priority for SE, but SE does have an interest through their involvement in the URC.
29	NL	LANARKSHIRE EZ - CALDER	Not a locational priority for SE.
30	NL	LANARKSHIRE EZ - AIRBLES	Not a locational priority for SE
31	NL	LANARKSHIRE EZ - DUNALISTER	Not a locational priority for SE
32	NL	Mossend EZ -NEWHOUSE/EUROCENTRAL 2009	Not a locational priority for SE
33	NL	Lanarkshire EZ - Excelsior	Not a locational priority for SE
34	NL	Lanarkshire EZ - Shawhead	Not a locational priority for SE
35	NL	LANARKSHIRE EZ - TANNOCHSIDE	Not a locational priority for SE
36	NL	CUMBERNAULD NW	Not a locational priority for SE
37	NL	GARTCOSH	Not a key sector locational priority although SE has property interests at this location.
38	NL	NEWHOUSE/EUROCENTRAL	Not a key sector locational priority although SE has property interests at this location.
39	NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	Not a locational priority for SE.
40	NL	RAVENS CRAIG	This is a regional regeneration priority for the Govt. SE is a key partner in the Ravenscraig Ltd partnership.
41	SL	LANGLANDS WEST SHAL	Not a locational priority for SE.
42	SL	RAITH SHAL	
43	GCC	Robroyston SHAL	
44	NLC	Faskin/Woodhall SHAL	
45	ERC	Pollock/Ryat SHAL	
46	GCC	Darnley Mains (Regionally Important)	Not a locational priority for SE
47	RC	ERSKINE (Regionally Important)	Not a locational priority for SE
48	RC	BISHOPTON(Potential New Strategic Location)	Not a locational priority for SE.
49	NLC	Wardpark (Potential New Strategic Location)	
51	SLC	Poniel (Potential New Strategic Location)	not a locational priority for SE
52	GCC	Clyde Waterfront International Financial Services District	This is a national regeneration priority for the Govt. SE has a specific interest in the IFSD as a world class business location for financial services and supportive activity.
53	ERC	M77/A726 Strategic Transportation Node	

Role and Function Criteria

SIB L NO.	UNITARY	SIBL	Has the SIBL been under pressure from unrelated non industrial uses? Y/N	Opportunity Sites/ Safeguarded Sites- LA's Views June 2010	Is the SIBL crucial to the success of the Metropolitan Development Strategy? Y/N
1	ER	BARRHEAD	YES	SAFEGUARDED SITE. The Barrhead (SIBL) extends to approximately 55Ha of which 27Ha (approx. 49%) is land which can be developed. Much of this total relates to small scale sites and there are only a limited number of reasonable size opportunity sites. Given	NO
2	ED	Westerhill	YES	LDP LEVEL PROTECTION but should be considered long term opportunity site.	NO
3	SL	Clyde Gateway	YES	OPPORTUNITY SITE. 11Ha. National priority. Major demolition and redevelopment proposed to create 188,000sq m office, 105,600 sq m industrial and 15,000 sq m commercial floorspace within the Shawfield area of South Lanarkshire by 2032. Target sectors (oxford economics)- Business Services	
4	SL	Cambuslang	No	LDP LEVEL PROTECTION. Needs to be consistent with CIP designation in Glasgow	
5A	SL	EK South and West (Peel Park north)	Yes	SAFEGUARDED SITE. 5.3Ha (Noth Section of site only). The northern section of Peel Park including the GSO business park is a high quality business park environment. There is opportunity for further development of GSO business park.	
5b	SL	EK South and West (Peel Park south)	yes	LDP LEVEL PROTECTION. Some sites may be redesignated to other uses.	
5c	SL	EK South and West (Langlands Park)	No	LDP LEVEL PROTECTION. Still some sites available	
5d	SL	EK South and West (SE Tech Park SETP)	No	SAFEGUARDED SITE. 5.26Ha Largely developed although has been subject to some demolition of obsolete units creating small scale development opportunities. Key sectors occupying site - life sciences, creative industries, energy	
5	SL	EK South and West (ALL)			
6	SL	Larkhall South	NO	OPPORTUNITY SITE. 22Ha. SIBL currently includes Strutherhill and Larkhall industrial estates and land at Canderside including recently developed NHS distribution centre to the south. Potentially scope to reconsider current boundaries and possibly extend site in future to create better opportunities for distribution sector. Target sectors (Oxford Economics)- Distribution.	
7A	SL	Blantyre/Whistleberry (Hamilton Technology Park)	No	SAFEGUARDED SITE. 3.8Ha. High quality business park environment. Largely developed. Limited opportunity for future expansion. Key sectors occupying site - Life sciences, finance/business services, creative industries	
7B	SL	Blantyre/Whistleberry (Craighead School)	YES	LDP LEVEL PROTECTION. Largely developed for general class 5/6 uses	
7	SL	Blantyre/Whistleberry (ALL)			
8	IC	CARTSBURN SIBL (linked to Riverside SIBL)	YES	OPPORTUNITY SITE. Greenock/Port Glasgow (Riverside) including Carts burn (Riverside Inverclyde) and the Riverside Business Park (see attached map. The map also shows the vacant business and industrial land) should be included in the list of SIBLs to be p	YES
9	IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	YES	OPPORTUNITY SITE. AS with Cartsburn SIBL. In addition I would add that the Inchgreen Graving Dock/Great Harbour area adjacent to the Riverside Business Park (north of the A8) has been identified by Ri URC (in conjunction with the owners Peel Holdings (Cly	YES
10	IC	Faulds Park SIBL	NO		NO
11	GCC	West of Scotland Science Park	NO	SAFEGUARDED SITE. Top level SDP protection.	YES
12	GCC	Robroyston	NO	OPPORTUNITY SITE. Top level SDP opportunity site.	YES

13	GCC	Clyde Gateway	NO	OPPORTUNITY SITE. Top level SDP protection.	YES
14	GCC	Queenslie	NO	LDP LEVEL PROTECTION.	NO
15	GCC	Cambuslang	NO	LDP LEVEL PROTECTION	NO
16	GCC	Glasgow Business Park	YES	LDP LEVEL OPPORTUNITY SITE.	NO
17	GCC	Pacific Quay	YES	SAFEGUARDED SITE. Top level SDP protection.	YES
18	GCC	Hillington/Cardonald	NO	SAFEGUARDED SITE. Middle category (SDP or LDP)	?
19	GCC	Darnley Mains	YES	OPPORTUNITY SITE. Middle category (SDP or LDP)	?
20	GCC	City Science/College Business Park	YES	SAFEGUARDED SITE . Top level SDP protection. CityScience Site. It seems to get high priority from SE (and I support that), however, as a city centre location I'm not sure whether we should treat it differently from the IFSD, which is also in the city cen	?
21	RC	Erskine Riverfront	Yes	LDP LEVEL PROTECTION..	Important role in terms of Strategic Policy 5
22	RC	Hillington IE	Yes	SAFEGUARDED SITE. Hillington site plus some industry /business sites in Renfrew North (CEDA)	Important role in terms of Strategic Policy 5
23	RC	Inchinnan (Glasgow Airport)	NO	NEW OPPORTUNITY GLASGOW AIRPORT strategic employment location.	Important role in terms of Strategic Policy 5
24	RC	Linwood Glasgow Airport)	Yes	NEW OPPORTUNITY GLASGOW AIRPORT strategic employment location.	Important role in terms of Strategic Policy 5
25	RC	Westway (Glasgow Airport)	Yes	NEW OPPORTUNITY GLASGOW AIRPORT strategic employment location.	Important role in terms of Strategic Policy 5
26	WD	Clydebank Riverside	No	OPPORTUNITY SITE. Comprises two relatively small sites: Hospital Gate (also referred to as Clyde Gate) & Queens Quay/Cart Street. Hospital Gate (2.85 ha) is undeveloped but has permission for office development on part of the site while Cart Street (2.99	Important role in terms of Strategic Policy 5 Yes
27	WD	Vale of Leven IE	Yes	OPPORTUNITY SITE. VoL Industrial Estate including the Kilmalid/Lomondgate area (approx 130 ha) seen as a key strategic opportunity site (see attached PowerPoint).	Yes
28	WD	Clydebank Business Park	No	SAFEGUARDED SITE.This site is largely built out and well established, with a number of regional offices. Occupancy level is approx. 85%. One opportunity site of 2.77ha remains undeveloped.	No?
29	NL	LANARKSHIRE EZ - CALDER	NO	LDP LEVEL PROTECTION.Almost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
30	NL	LANARKSHIRE EZ - AIRBLES	NO	LDP LEVEL PROTECTIONAlmost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
31	NL	LANARKSHIRE EZ - DUNALISTER	NO	LDP LEVEL PROTECTION.Almost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
32	NL	Mossend EZ - NEWHOUSE/EUROCE	NO	LDP LEVEL PROTECTION.Almost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
33	NL	NTRAL 2009 Lanarkshire EZ - Excelsior	NO	LDP LEVEL PROTECTION.Almost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
34	NL	Lanarkshire EZ - Shawhead	NO	LDP LEVEL PROTECTION.Almost no development opportunity left in these locations, therefore we recommend all should be removed from the MIR and protected through the LDP process.	NO
35	NL	LANARKSHIRE EZ - TANNOSIDE	NO	SAFEGUARDED SITE.Tannochside Park – We feel this site is significant enough to warrant strategic protection.	NO
36	NL	CUMBERNAULD NW	NO	SAFEGUARDED SITE. Cumbernauld NW - NLC is committed to review this site through the emerging NLLP. We would recommend that it is included under the safeguarding policy but with the review referred to in a caveat.	NO
37	NL	GARTCOSH	NO	OPPORTUNITY SITE. Gartcosh - Extensive large scale opportunity for variety of sectors/users. Crime Campus also establishes scientific uses – see paper attached.	NO
38	NL	NEWHOUSE/EUROCE	NO	OPPORTUNITY SITE. Eurocentral - Extensive large scale	NO

		NTRAL		opportunity for variety of sectors/users. We would also recommend merging this as a location with Newhouse Industrial Estate and Prologis Junction 6	
39	NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	NO	SAFEGUARDED SITE.Bellshill /Righead/Strathclyde Business Park – Due to the proximity of these locations we would recommend that they are protected under one name e.g. North Lanarkshire A725 locations	NO
40	NL	RAVENSCRAIG	NO	OPPORTUNITY SITE.Ravenscraig - Extensive large scale opportunity for variety of sectors/users. Also could be a centre for sustainable construction – see paper attached	YES
41	SL	LANGLANDS WEST SHAL	no	OPPORTUNITY SITE. Plot A ('Rolls Royce' Site) 18.3ha Plot B 12.9 ha Remainder of site (unserved) 54.8ha. Former SUHAS which has benefitted from. considerable public investment in site preparation and is already allocated for industrial/business use in Local Plan (unlike other former SUHAS in Structure Plan) Plots A and B are large serviced sites which are now eligible to be added to marketable supply. The location is not however ideal in terms of access to the strategic road network and public transport The site is not particularly suited to the growth sectors identified in Oxford Economics base projection. However if the Rebalancing scenario with its emphasis on manufacturing was achieved, there may be a requirement for large sites of this type.	currently safeguarded high amenity location
42	SL	RAITH SHAL	possibly	Former SUHAS - Remain in Greenbelt.	currently safeguarded high amenity location
43	GCC	Robroyston SHAL			
44	NLC	Faskin/Woodhall SHAL			
45	ERC	Pollock/Ryat SHAL	Yes	SAFEGUARDED SITE. To date an appropriate user has not come forward for this site, previously safeguarded through national economic policy. Consequently this site has not been developed. For this site to be developed it would require substantial investment	No
46	GCC	Darnley Mains (Regionally Important)			
47	RC	ERSKINE (Regionally Important)			
48	RC	BISHOPTON(Potential New Strategic Location)		OPPORTUNITY SITE. 43 ha of industrial/business land has been approved as part of Bishopton CGA	
51		Poniel (Potential New Strategic Location)		OPPORTUNITY SITE. 75Ha.Not currently a SIBL. Outline consent for mixed use 2005. Bonded warehouse use established on part of site 2009. New application ppip 2010 for mixed use development on larger site. This general location would be suitable for warehousing/distribution uses which are projected to increase in SL.Target sectors (Oxford Economics)- Distribution	
52	GCC	Clyde Waterfront International Financial Services District		Opportunity Site This is a national regeneration priority for the Govt. SE has a specific interest in the IFSD as a world class business location for financial services and supportive activity.	
53	ERC	M77/A726 Strategic Transportation Node		Both the Pollok/Ryatt site and the M77/A726 strategic transportation node, would be regarded as Potential Strategic Economic Location within the SDP.	

Relationship to Oxford Economics Growth Sectors

SIBL NO.	UNITARY	SIBL	Does the SIBL promote the growth sectors identified in Oxford Economics April 2010 Report and which Sectors. (See OE Sector Tab)
1	ER	BARRHEAD	NO
2	ED	Westerhill	Yes - Business Services, Financial Services, Distribution
3	SL	Clyde Gateway	Business Services
4	SL	Cambuslang	
5A	SL	EK South and West (Peel Park north)	Business Services
5b	SL	EK South and West (Peel Park south)	
5c	SL	EK South and West (Langlands Park)	
5d	SL	EK South and West (SE Tech Park SETP)	
5	SL	EK South and West (ALL)	
6	SL	Larkhall South	Distribution
7A	SL	Blantyre/Whistleberry (Hamilton Technology Park)	
7B	SL	Blantyre/Whistleberry (Craighead School)	
7	SL	Blantyre/Whistleberry (ALL)	
8	IC	CARTSBURN SIBL (linked to Riverside SIBL)	Business/Finance
9	IC	GREENOCK/PORT GLASGOW (RIVERSIDE) SIBL	Business/Construction/Distribution. In addition " the Inchgreen Graving Dock/Great Harbour area adjacent to the Riverside Business Park (north of the A8) has been identified by Ri URC (in conjunction with the owners Peel Holdings (Clydeport)) as a location for promoting some forms of 'green energy'/ renewables manufacturing. Discussions are ongoing with our Service/Council on this and as I understand it, this is one of the key growth sectors identified by the Scottish Government/SE."
10	IC	Faulds Park SIBL	
11	GCC	West of Scotland Science Park	Business Services (Science/R&D)
12	GCC	Robroyston	Business Services
13	GCC	Clyde Gateway	Business Services/ Distribution Sector
14	GCC	Queenslie	Distribution Sector
15	GCC	Cambuslang	Distribution Sector
16	GCC	Glasgow Business Park	Distribution Sector
17	GCC	Pacific Quay	Television and Media Hub
18	GCC	Hillington/Cardonald	Business Services/ Distribution Sector
19	GCC	Darnley Mains	Business Services
20	GCC	City Science/College Business Park	Business Services (Science/R&D)

21	RC	Erskine Riverfront	LDP level protection. Doesn't contribute to the identified growth sectors.
22	RC	Hillington IE	Contributes to a number of key growth sectors identified within the Oxford Economics report. Hillington Park is Scotland's largest business park & industrial estate. The business park is strategically located in the M8 corridor between Glasgow City Centre and Glasgow International Airport and is easily accessible by public transport (two railway stations within the park). Hillington and Renfrew North promote the Business Services, Distribution and Construction Sectors. Business Services Sector - there is a significant amount of high quality, accessible office space within this location (including the award winning innovation centre and the titanium business park). In addition, Hillington has around 20 ha of quality land available. 375,000 sqft of grade A office space has been granted planning permission at Hillington frontage. Distribution Sector - The Deanside Freight Terminal is within this location. This terminal is safeguarded as an International Transport Facility within the Structure Plan and is considered to be a strategic facility that requires safeguarding. Construction Sector - Hillington offers a variety of premises that suit the needs of a diversity of businesses. There are a considerable amount of premises within this location which provide yard space and are occupied by construction companies. There is also vacant land and premises which could be re-developed to support growth within this sector.
23	RC	Inchinnan (Glasgow Airport)	This location benefits from being in close proximity to the airport. It is envisaged that the sum of the sites would create a strategic airport employment zone which could be targeted at a number of different sectors. Given the accessibility of this zone it is considered that there is an opportunity to further promote development of the business services growth sector of which there are a number of recent examples. In addition to the opportunity provided at this location there are a number of businesses that are located within this zone which contribute to the key growth sectors identified within the OE's report (For Example - Distribution Sector - WH Malcolm, Linwood and KWE, Westway & Health Sector - Life Technologies Ltd and Vascutek, Inchinnan). It should also be noted that Doosan Babcock, Rolls Royce, Invetech, Strathclyde University Advanced Forming Research Centre, WM Tracey, Aggreko, Invetech and Teknek are among a diversity of well established businesses that are located within this strategic zone. The Airport Masterplan forecast for a growth in passenger numbers to 15 million by 2015 remains a target for BAA even in the current economic climate. The expected growth of the airport will require businesses that are currently located within the airport campus to be relocated to sites in close proximity to the airport. Furthermore, it is recognised in Glasgow Airport's Economic Development Framework that much of the growth at the airport does not require to be accommodated on-site but can be supported by the wider zone (approx 2-3 miles around airport) within which the airport is located. This zone is a key strategic economic development hub in its own right and it is important that there is range of appropriate quality sites to support the expected growth. There are a range of quality, marketable sites within the proposed airport zone. Key locations include the Cart Corridor Area (subject of a joint venture by the Council, RBS and Scottish Enterprise), Inchinnan Business Park, Westway Park, the Existing SIBL at Linwood and the Murray Street Business Area. The Airport Zone provides an appropriate range of sites to support growth, while growth of the airport does present an opportunity to help support the growth of key industries through both supporting existing companies and attracting new ones.
24	RC	Linwood Glasgow Airport)	
25	RC	Westway (Glasgow Airport)	
26	WD	Clydebank Riverside	YES: Business Services, Financial Services, Health
27	WD	Vale of Leven IE	YES: Business Services, Financial Services, Distribution, Health, Financial, Hotel

28	WD	Clydebank Business Park	YES: Business Services, Financial Services
29	NL	LANARKSHIRE EZ - CALDER	
30	NL	LANARKSHIRE EZ - AIRBLES	
31	NL	LANARKSHIRE EZ - DUNALISTER	
32	NL	Mossend EZ - NEWHOUSE/EUROCENTRAL 2009	
33	NL	Lanarkshire EZ - Excelsior	
34	NL	Lanarkshire EZ - Shawhead	
35	NL	LANARKSHIRE EZ - TANNOCHSIDE	
36	NL	CUMBERNAULD NW	
37	NL	GARTCOSH	
38	NL	NEWHOUSE/EUROCENTRAL	
39	NL	STRATHCLYDE BUSINESS PARK/Righead/Bellshill	
40	NL	RAVENS CRAIG	
41	SL	LANGLANDS WEST SHAL	
42	SL	RAITH SHAL	
43	GCC	Robroyston SHAL	
44	NLC	Faskin/Woodhall SHAL	
45	ERC	Pollock/Ryat SHAL	YES
46	GCC	Darnley Mains (Regionally Important)	Business Services
47	RC	ERSKINE (Regionally Important)	LDP Level Protection
48	RC	BISHOPTON(Potential New Strategic Location)	Bishopton CGA is considered to be a strategic opportunity location which could promote the growth sectors identified within the OE's report, primarily the Business Services Sector. It is recognised in NPF 2 that good transport connections make Bishopton the preferred location for long-term expansion to the west of Glasgow. The development of 138,000sqm of Bus/ind floorspace approved as part of the masterplan is key to the delivery of the Community Growth Area. There is an opportunity to develop a high quality and highly accessible business park that is well located to promote growth within the business services sector.
49	NLC	Wardpark (Potential New Strategic Location)	
51	SLC	Poniel (Potential New Strategic Location)	Distribution
52	GCC	Clyde Waterfront International Financial Services District	Financial Services
53	ERC	M77/A726 Strategic Transportation Node	YES





GLASGOW **and**
the CLYDE VALLEY
strategic development
planning authority

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