

**West Lothian Council – Local Development Plan**

**Main Issues Report on behalf of the Rosebery Estates Partnership**

**Main Issue 1: Economic Development and Growth**

**Question 5) Do you agree with the ‘Preferred’ approach to employment land which would introduce an opportunity for a broader range of land use to be supported within existing employment land allocations and industrial estates?  
If not, why not?**

We support the “preferred” approach to employment land, identified in the Main Issues Report, to review the range of uses which could be accommodated on employment land, with a view to accommodating a more flexible approach involving a wider range of uses on sites identified in the LDP.

Picking up on the identified oversupply of land and lack of clarity over the location and “fitness for purpose” of much of the existing employment land supply, we have engaged the services of Ryden Property Consultants to undertake the attached “Employment Land and Property Market Review” which has informed our representations.

It can be seen from the attached study that the site (Ref: EOI-0012 & EOI-0013) is currently not identified as part of the effective employment land supply; is in a secondary location with major constraints preventing it becoming effective for its currently allocated use and in the absence of a new approach, is expected to remain undeveloped as an employment site into the longer term.

The market review suggests that the sites best prospects within the employment use classes would be for an estate targeting medium sized industrial/logistics users of around 4-6ha (approx. 20-25% of the total site). However, this development on its own is not seen as being likely to be viable due to the infrastructure and servicing costs associated with the site.

We therefore believe that Almond North (Ref: EOI-0012 & EOI-0013) is an area which would warrant a more flexible approach would therefore seek an amendment to the currently proposed designation of these areas to allow for a mixed use development comprising residential and a medium sized estate (4-6ha) targeting medium sized industrial and logistics users be permitted on these sites in the Proposed Plan.

**SEE ATTACHED EMPLOYMENT LAND AND PROPERTY MARKET REVIEW**

**Question 6) Do you agree with the ‘Alternative’ approach to employment land?**

We would not support the “alternative” approach.

**Question 8) Has the council identified enough employment land in West Lothian to meet requirements and are the larger employment sites in the right locations?**

We believe that the Council has an over-supply of employment land, particularly for certain sectors as confirmed in the Ryden Report referred to in our response to Question 5 and that in particular, Almond North (Ref: EOI-0012 & EOI-0013) is too large and in the wrong location for the uses currently envisaged in the Plan. A flexible approach to this site as suggested in our response to Question 5 would be justified here.

### Main Issue 3: Housing Growth, Delivery and Sustainable Housing Locations

#### Question 15) Do you agree with the 'Preferred' strategy for housing growth in West Lothian? If not, why not?

We support the preferred option adopting Scenario 3 (high growth) and planning for 3,500 houses above the base requirement. However, we see this as being simply the "generosity allowance" (which seems to be at the upper end of the scale required by SPP) which does not appear to have been added elsewhere to the Councils numbers. We are also concerned by the calculation used in the Background Housing Paper and do not believe that the calculation is correct.

We note that the Housing Land background paper considers the SESplan Housing Land Supplementary Guidance as being an inadequate basis on which to prepare this consultation. There is only one Member Authority awaiting ratification of the SG Housing Land (East Lothian Council on 28<sup>th</sup> October) and this document has been relied upon by the DPEA Reporters Unit in recent appeal decisions and would therefore consider it to be completely adequate for this purpose.

We had responded to the SESplan SG Consultation seeking clarification that the numbers identified in Table 3.2 (headed "Additional Allowances...") were in fact in addition to the numbers in Table 3.1. We did not receive a clear response to this, and have since been told that Table 3.2 is simply an indication of where the Table 3.1 numbers might be delivered. This is clearly an area where clarification is required and we have written to SESplan Authority seeking this clarification and would suggest the Council do likewise.

As we understand it, and using the information from the Councils Housing Background Paper, we believe that a table which looks like the following should be prepared, particularly if the Council are looking to exceed the 10 year requirement in this Plan. We have not undertaken detailed analysis of the figures used, but simply lifted them from the Councils Background Paper.

<b>Setting the LDP Housing Land Supply Target</b>	<b>2009-2019</b>	<b>2019-2024</b>
West Lothian Council Housing Land Requirement	11,420	6,590
+ 20% to ensure a generous supply and achieve +3,500	2,284	1,318
<b>LDP Housing Land Supply Target</b>	<b>13,704</b>	<b>7,908</b>
<b>Meeting the LDP Housing Land Supply Target</b>		
Effective Supply	3,418	3,227
Constrained Sites Coming Forward	2,701	3,580
Housing Completions 2009-2013	1,302	-
Windfall	480	400
Demolitions	- 568	- 100
<b>Total Supply from Existing Sources</b>	<b>7,333</b>	<b>7,107</b>
<b>Target to be met through new LDP allocations</b>	<b>6,371</b>	<b>801</b>

This approach would appear to indicate a larger shortfall to be met in this plan than currently anticipated by the Council, which we felt might be helpful to highlight at this stage to avoid this becoming an Examination Issue.

If we are correct, and the shortfall is of the scale identified above, then additional housing sites will be required, and it is not considered to be appropriate to simply add more sites to the existing large scale development areas. We have suggested an approach which might help deliver some additional housing numbers in a marketable area at Livingston, and at Bridgend.

**Question 16) Do you agree with ‘Alternative Strategy 1’ for housing growth in West Lothian? If so, why?**

No we do not agree with the “Alternative Strategy 1” for housing growth in West Lothian.

**Question 17) Do you agree with ‘Alternative Strategy 2’ for housing growth in West Lothian? If so, why?**

No we do not agree with the “Alternative Strategy 2” for housing growth in West Lothian.

**Question 20) Do you agree with the ‘Preferred’ option for the removal of existing housing allocations from the development plan? If not, why not?**

We support in some cases the removal of allocations from sites which clearly will not come forward for development, but we support the continued identification of Bridgend site ref HBd2/EOI-0011 at Willowdean (South) as a 1.12ha site for a development of up to 40 houses. We are in the late stages of concluding a sale to a housebuilder who is standing by with an application ready to submit.

However, we are unable to support the identification of EOI-0010 at Land adjacent to Bridgend Golf Course as a preferred new site for a development of 25 houses. This site represents an illogical extension of the settlement in to the countryside and there are restrictions preventing development in place meaning that it is unlikely to come forward for development even if allocated. We therefore must object to this preferred allocation.

We are similarly unable to support the identification of EOI-0065 at Bridgend Farm as a preferred new site for a development of 30 houses. This site was considered at the last Local Plan Examination (as North East Bridgend) and the Councils case indicated that this site formed an *“important and valuable contribution to the landscape setting of Bridgend, which would be substantially eroded as a consequence of being developed”*, there were also concerns about site servicing and access amongst other things. The Reporter in considering the site concluded that the allocation *“could be considered as a strategic extension of Bridgend, which we find would have a significant adverse impact on the character of the village”*. We therefore must object to this preferred allocation.

We have no objection to, and support, the identification of COU3 at Auldhill as a preferred new site for a development of 5 houses.

In light of the issues identified above with the majority of the preferred new sites, and the loss of some 55 houses from the land supply and the settlement, we would propose the allocation of the attached site at Bridgend in their place, to deliver the housing numbers (and potentially slightly more) in what we consider to be a more appropriate location better related to the school, shops and bus stops than many of the current sites under consideration. Had we anticipated Bridgend being subject to such significant growth we would have put this site forward in response to the Call for Sites.

The site is not in an area identified as being at high risk of abandoned underground mines, but further investigation on this will be undertaken to establish this. There are no listed buildings, scheduled ancient monuments or other features of archaeological significance on the site or in the vicinity. The site is not identified by SEPA as being subject to flooding from rivers, the sea, or surface water. The site is not identified by SNH as being within or in close proximity to any features of environmental or ecological significance or protection.

The site is within the ownership of a person actively involved in discussions with a housebuilder regarding the development of the currently allocated site, and steps are being taken to make this land available at which stage it is hoped that it would be of interest to the housebuilder to enable them to continue the currently allocated site on to this land providing a through link from Willowdean to Auldhill Road.

The major benefit of this would be a logical rounding off of the settlement on some marginal agricultural land, and securing development in close proximity to the school, bus stops and village shop. Whilst the site is larger than those being replaced (approx. 6.4ha), we are not proposing development on the whole site. We have identified an approximate developable area of some 3.8ha, capable of accommodating approximately 90 houses, with the balance being landscaping, park and open space to enhance the landscape setting of the development and minimise any adverse impact.

### **SEE ATTACHED BRIDGEND PLAN**

#### **Question 22) Do you have any other alternative options? What are they and how would you make them work?**

As set out in responses to Questions 5, 8 and 15, we believe that there is a larger shortfall than anticipated, and that a more flexible approach is justified to the Almond North CDA (Ref: EOI-0013) and the preferred new site for employment provision (Ref: EOI-0012).

We note, in the “Infrastructure Considerations” part of the Livingston Settlement Statement, that there are significant levels of employment land available but that these *“require to be reviewed to ensure they are in the right location and remain fit for purpose”*. Picking up on this, and as highlighted in our response to Question 5, we have commissioned Ryden to undertake a “Employment Land and Property Market Review” of the land supply in West Lothian generally, and Livingston specifically.

We note that whilst, on the proposals map, EOI-0012 is identified as “Preferred New Site” for employment, however it is not identified in the Settlement Statement as such. We would request that this preferred site be reflected on the Settlement Statement as such, but that consideration be given to the change outlined in our response to Question 5.

It would appear as though the Council may have a shortfall of housing land that needs to be met, and that the employment development considered for this site is, on its own, unlikely to come forward in the short to medium term. We would therefore request that consideration be given to amending the proposed allocation of these sites as outlined in our response to Question 5 for a mixed use development comprising residential and a medium sized estate (4-6ha) targeting medium sized industrial and logistics. The precise mix will require further investigation.

We have also requested that consideration be given to extending the Almond North CDA (Ref: EOI-0013) down to the river (as per the adjacent Council owned site Ref: EOI-0173) to allow for landscaping, open space and SUDs to be located in this area and for a comprehensive masterplan to be Prepared.

### **SEE ATTACHED LIVINGSTON PLAN & EMPLOYMENT LAND AND PROPERTY MARKET REVIEW**

## **Main Issue 6: The Natural and Historic Environment**

**Question 54) Is the 'Preferred' approach to housing development in the countryside appropriate? If not, why not?**

We support the "Preferred Approach" to housing development in the countryside.

We nevertheless believe that some general updating and relaxation of this in some cases might be appropriate to maintain the windfall assumptions.

**Question 55) Do you agree with any of the 'Alternative' approaches to housing development in the countryside?**

We would also support the "Alternative Approach 1" allowing more redevelopment of rural brownfield land for housing which we believe would allow for the windfall numbers to be maintained. As the Lowland Crofting Policy has been in place and delivered 12 sites since the early 1990's it has to be assumed that the most attractive areas have been developed and a question mark over how many more might be delivered. This has to be offset somewhere



**Almond North, Livingston  
Employment Land and  
Property Market Review**

**For**

**Dalmeny Estate**

**October 2014**

# Contents

- 1.0 Introduction**
- 2.0 Almond North Site**
- 3.0 Employment Land**
- 4.0 Employment Property Markets**
- 5.0 Review of Employment Allocation**
- 6.0 Summary and Conclusions**

## **1.0 Introduction**

- 1.1 Dalmeny Estate instructed property consultants Ryden to investigate employment land and property markets in West Lothian and Livingston. This is to establish market potential for land at Almond North, Livingston.
- 1.2 The report reviews and analyses the employment land and property markets based upon formal market analysis, West Lothian Council data and Ryden's market knowledge. The report focusses on employment uses as described under Class 4, 5 & 6 of the Town and Country Planning (Use Classes) (Scotland) Order 1997.
- 1.3 Section 2 of this report describes the subject site and Section 3 analyses employment land in West Lothian. Section 4 reviews the employment property markets, with a particular focus upon Livingston. Section 5 reviews the Almond North site's prospects as an employment allocation and Section 6 provides Ryden's summary and conclusions for Dalmeny Estate. Appended to the report is register of employment sites in Livingston.



## 2.0 Almond North, Livingston

### Site Context

- 2.1 Livingston was the fourth of Scotland's New Towns created to accommodate population overspill – the majority from Glasgow - in the 1950s and 60s. Since then, rapid population growth has resulted in Livingston becoming Scotland's seventh largest settlement, the second largest in the Lothians after Edinburgh and the largest in West Lothian.

### Site Location and History

- 2.2 The subject site comprises two areas of land situated either side of the A703 road which connects Livingston to the east with Blackburn to the west. The site is located on the western edge of Livingston and is currently in agricultural use (see Figure 1 below).

**Figure 1: Location of Almond North Site**



Source : Google Earth

2.3 The southern portion of the site is identified in the West Lothian Local Plan 2009 as an employment site – reference “AN” or Almond North. It lies within the West Livingston/ Mossend and Calderwood CDA (Core Development Area). Policy CDA 9 states that:

*“employment land is allocated at Almond South and Almond North to capitalise on the proximity to the successful major employment areas at Kirkton Campus and Alba Campus”.*

2.4 The policy acknowledges the proximity of Almond North to the Wilton and Grangemouth Ethylene Pipeline and requires any development to be considered in consultation with the Health and Safety Executive.

2.5 West Lothian Council published a Main Issues Report (MIR) in August 2014. This report is used to develop potential content for the emerging Local Development Plan, which will replace the current Local Plan. The MIR carries forward the CDA-AN<sup>1</sup> “Almond North” allocation at the southern portion of the site and includes the northern portion as a potential site for employment use. The MIR indicates that this site, reference EOI - 0012 is a preferred location for development.

2.6 The area of site EOI - 0012 is 7.4 hectares, while EOI - 0013 is around 17 hectares. The total Almond North employment land allocation is therefore approximately 24.4 hectares (equivalent to 62 acres).

2.7 Site EOI – 0013 is bounded on the east by land currently under the ownership of West Lothian Council. This Council-owned site is given reference number EOI – 0173 and is an irregular-shaped strip of land which runs from the Toll Roundabout south to the River Almond valley. This site extends to around 6 hectares.

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<sup>1</sup> MIR reference EOI - 0013

### 3.0 Employment Land

#### Introduction

- 3.1 This section of the report assesses employment land supply and take-up in Livingston and West Lothian. The land review provides a context for the research into market prospects for employment use at Almond North. For the purposes of this report Almond North refers to both site EOI – 0012 and EOI – 0013.

#### National Strategies

- 3.2 The Government Economic Strategy was first published in 2007, with a refresh released in September 2011. It outlines six key sectors which provide Scotland with the best prospects to raise the country's underlying trend rate of sustainable economic growth. The key sectors are:

- Energy;
- Financial and Business Services;
- Food and Drink;
- Life Sciences;
- Tourism; and,
- Creative Industries (Digital Media and Enabling Technologies).

- 3.3 The National Planning Framework (NPF3) is the spatial expression of the Government Economic Strategy and sets out a long term vision for development in Scotland. It provides a framework for development across Scotland's cities and towns, rural areas, and coastal and island communities. It sets out 14 National Developments which are of national significance and contribute towards the sustainable economic growth of Scotland and its transition towards a low carbon economy.

- 3.4 Scottish Planning Policy (SPP) was updated in June 2014 and provides the detail on how national planning outcomes are to be achieved by the planning service. It shares a Vision of a future Scotland with NPF3 which states:

*"We live in a Scotland with a growing, low carbon economy with progressively narrowing disparities in well-being and opportunity. It is growth that can be achieved whilst reducing emissions and which respects the quality of environment, place and life which makes our country so special. It*

*is growth which increases solidarity – reducing inequalities between our regions. We live in sustainable, well-designed places and homes which meet our needs. We enjoy excellent transport and digital connections, internally and with the rest of the world”.*

- 3.5 To help achieve this vision, SPP provides detailed policy guidance on a range of topics relating to the planning system. In relation to the subject policy on Business & Employment, SPP states that development plans should reflect a robust evidence base which characterises economic activity in the area and any anticipated changes in these<sup>2</sup>. Plans should also take account of:
- current market demand;
  - location, size, quality and infrastructure requirements;
  - whether sites are serviced or serviceable within five years;
  - the potential for a mix of uses;
  - their accessibility to sustainable modes of transport.
- 3.6 The Strategic Development Plan for the area is the South East Scotland Strategic Development Plan (SESPlan). SESPlan was approved in June 2013 and provides a framework for the development of the Edinburgh City Region, which incorporates the Lothians, the Scottish Borders and the southern part of Fife.
- 3.7 SESPlan’s spatial strategy builds on committed developments and focusses further developments along thirteen Strategic Development Areas (SDAs) which support the creation of sustainable, successful places. These SDAs are selected because of their capacity to support new development in terms of transport and infrastructure.
- 3.8 SESPlan supports Livingston as a Strategic Town Centre within the wider West Lothian Sub-Regional Area. This area is identified as a key location for research and development, knowledge-based and high technology manufacturing businesses. The area is also noted as a key location for business service and retail companies. SESPlan supports those initiatives that aim to diversify the West Lothian economy.
- 3.9 Policy 2 supports the development of a range of marketable sites of the size and quality to meet the requirements of business and industry within the

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<sup>2</sup> SPP paragraph 97

SESPlan area. It directs Local Development Plans to ensure that the requirement for strategic employment land is delivered at the local level. The strategic employment land requirement for the SESPlan area is shown in Table 1 below.

**Table 1: Strategic Employment Land Requirement by SDA**

Sub-Regional Area	Land Supply (Ha)
Regional Core	247
East Coast	76
Fife Forth	411
Midlothian/ Borders	124
West Lothian	123
<b>Total</b>	<b>981</b>

Source: SESPlan

- 3.10 The total for each Local Development Plan is shown in Table 2 below. West Lothian is both a sub-regional area and a Local Development Area and has the same strategic employment land supply in each table.

**Table 2: LDP Area Employment Land Requirement**

Local Development Plan	Land Supply (Ha)
City of Edinburgh	186
East Lothian	76
Fife	411
Midlothian	129
Scottish Borders	56
West Lothian	123
<b>Total</b>	<b>981</b>

Source: SESPlan

- 3.11 Employment land locations across SESPlan's area are shown in Figure 2.

**Figure 2: SESPlan Employment Locations**

Source: SESPlan Economy Technical Note

### Employment Land Supply

- 3.12 The employment land supply for West Lothian comprises all undeveloped land allocated for employment use in the adopted Local Plan, or land which has a valid planning consent for such use. This includes the southern portion of the Almond North site, MIR reference EOI - 0013.
- 3.13 Immediately available land is defined as to have no significant constraints and is considered to be effective; minor constrained land could be made available within a 5-year period and is also considered to be effective; and major constrained land has restrictions which mean it would not be available within a 5-year period, and is therefore considered to be not effective. Safeguarded employment land allocations are generally subject to constraints which may or may not be removed during a 5-year period. These comprise land identified in development plans for specialist company uses or expansion purposes, or land which is not currently allocated for employment use but is considered suitable for allocation in the longer term.
- 3.14 The MIR published in August 2014 was accompanied by a Background Paper on West Lothian's economy. It contains an assessment of West

Lothian's Employment Land Supply conducted in July 2013<sup>3</sup>. According to the site-by-site analysis of all employment land allocations contained in the 2009 Local Plan, West Lothian has a total of 448.11ha. of undeveloped employment land from the employment land supply of 645ha. This figure is inflated by land within employment area boundaries or allocations, whether used or not, to 1,070ha. of employment land. If CDA allocations are included then the figure rises further to 1,183ha.

- 3.15 Of the total allocation 645ha. employment land allocation, 83ha. was considered to be effective, equating to 12.9%. The definition of effective in the background paper includes only land which is immediately available. It does not include land with minor constraints, which in previous policy and more generally is also considered to be effective. Employment land with only minor constraints in West Lothian totalled 72ha. in 2011<sup>4</sup>. A revised total for this minor constrained land is not reported in the background paper but it is unlikely that a large proportion would have been developed in the intervening, post-recessionary period since 2011.
- 3.16 The Council's analysis concludes that site EOI – 0012 has major constraints and does not form part of the effective supply. Site EOI – 0013/ CDA-AN is part of the Core Development Area and is not analysed as part of this exercise.
- 3.17 According to the Monitoring Statement published with the MIR, SESPlan requires the emerging local development plan to support the allocation of 123ha. of strategic employment land<sup>5</sup>. The Statement concludes the local development plan will need to allocate a further 35ha. of strategic employment land to deliver the requirements of SESPlan.
- 3.18 The Monitoring Statement also notes that West Lothian is the location of an Enterprise Area, which comprise three sites: two in Broxburn; and, one in Livingston. The location of the Livingston Enterprise Area is shown in Figure 3 below and lies to the north east of the subject site.

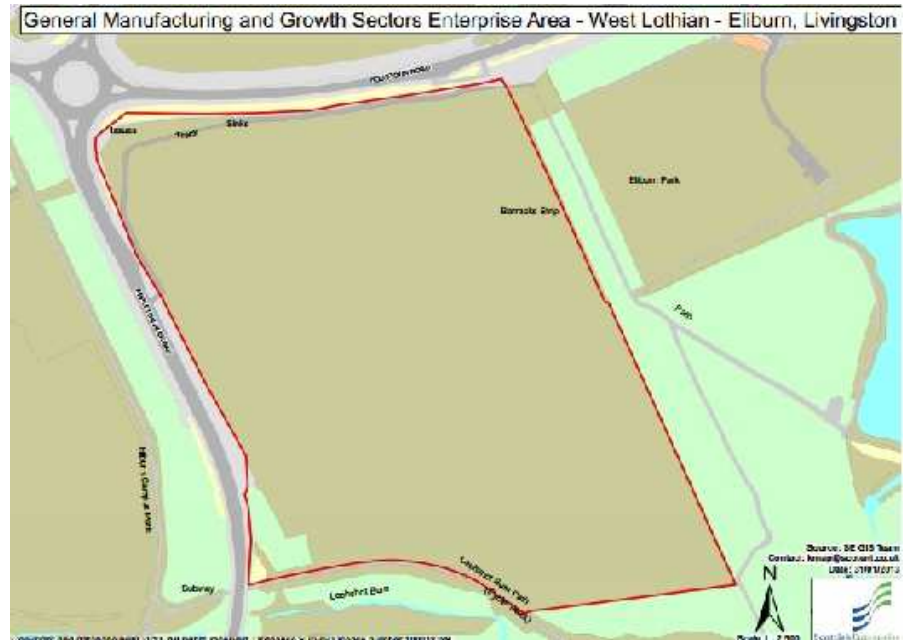
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<sup>3</sup> See Appendix 3, West Lothian Local Development Plan Main Issues Report Economy Background Paper

<sup>4</sup> SEPlan Economy Technical Note, November 2011

<sup>5</sup> see Tables 1 & 2 above

**Figure 3: Livingston Enterprise Area - Eliburn**



Livingston Employment Land Supply

- 3.19 In order to focus this analysis, the employment land supply of Livingston will be examined as context for the subject sites. Appendix A tabulates all employment allocations analysed in the MIR Economy Background Paper<sup>6</sup> that are located in Livingston.
- 3.20 The table shows that the total allocations from the previous plan combine to create an employment land supply of 171.63ha. Of this total, 25.35ha. have been developed for employment use which leaves a total of 142.98ha. of undeveloped employment land in Livingston<sup>7</sup>.
- 3.21 Site EOI-0013/ CDA-AN is not part of this established employment land supply. It is a longer-term prospect for employment use, as described in MIR page 154<sup>8</sup>. As part of the Core Development Area designation, employment sites are not counted as part of the mainstream employment land supply. As noted above in paragraph 3.14, introducing the employment areas within CDAs inflates current supply figures.

<sup>6</sup> See Appendices 3 & 4 of the August 2014 Economy Background Paper

<sup>7</sup> Some allocations have been partially developed which accounts for the difference

<sup>8</sup> As part of the Livingston Settlement Statement



### Employment Land Take-up

- 3.22 The average employment land take-up for West Lothian for the period 1992 to 2005 is shown in Table 3. The average annual take-up over this period was 5.0 hectares. Take-up between 2003 and 2005 was significantly higher than the long-run average and accounted for the majority of the regional total take-up, partially due to the construction and occupation of several large storage and distribution facilities near Junction 4 of the M8.

**Table 3: West Lothian Employment Land Take-up 1992 – 2005**

Take-up	Size (Ha)	% of Lothians Take-up
1992 – 2003	11.4	40%
2003 – 2005	59.4	52%
2004 – 2005	25.4	59%

*Source: Edinburgh & Lothians Structure Plan Monitoring Report (2005)*

- 3.23 This report includes analysis of land take-up from the 2005 Structure Plan data onwards. The data is based upon land transactions rather than development; in comparison with development plan data it is likely to over-estimate take-up as some sites will be bought for the long term, and in the fullness of time may not be developed for employment uses.
- 3.24 From January 2005 to January 2014, a total of 20 land sale transactions (excluding sales which are known to be for residential development) have been recorded in Livingston. These sales are shown in Table 4 by year of the transaction date.
- 3.25 The average number of transactions is just over two per year. The data includes a significant spike in 2008, where the sale of the former NEC Corporation site at Deans Industrial Estate and re-use for distribution by Tesco inflates the average from 2.54ha. per annum to 8.25 ha.
- 3.26 Considering the West Lothian long run historic take-up of 5ha. per annum as a reasonable average, the 83 ha. of immediately available employment land equates to 17 years' supply. The potentially c.72ha. of land identified in 2011 as having only minor constraints could add around 14 years to this effective

supply. Sites with major constraints (including the subject site), Safeguarded or in Core Development Area Sites are not included in this assessment.

**Table 4: Livingston Land Transactions**

Year	No. of Transactions	Total Size (Ha)
2005	1	5.06
2006	2	1.33
2007	11	12.11
2008	2	52.58
2009	2	0.27
2010	1	0.65
2011	0	0
2012	0	0
2013	1	2.29
<b>Total</b>	<b>20</b>	<b>74.29</b>
<b>Annual average</b>	<b>2.2</b>	<b>8.25</b>

*Source: Costar*

### Summary

- 3.27 SESPlan's spatial strategy acknowledges the significant role played by West Lothian's economic cluster around the M8 Corridor and Livingston and directs future strategic employment land development towards this area. Recent land transactions and take-up data show large transactions and development of employment land in this location.
- 3.28 The take-up of employment land has varied dramatically in recent years due to major development and transactions in the M8 corridor. Long-run averages indicate that West Lothian has 17 years' supply of immediately available employment land and a reserve of perhaps a further 14 years' supply in sites with only minor constraints, before majorly constrained locations<sup>9</sup>, safeguarded sites or Core Development Areas<sup>10</sup> are considered. In terms of quantitative of provision, West Lothian would appear to have a more than adequate supply of employment land. Livingston has 143ha. of undeveloped employment land, not including allocations such as the subject site.

<sup>9</sup> such as site EOI - 0012

<sup>10</sup> such as site EOI - 0013

3.29 In qualitative terms, the SESPlan requirement directs new strategic employment locations to be found within the Strategic Development Areas. For West Lothian, these are located around Livingston and the M8 corridor and in the various CDAs allocated in the extant Local Plan.

## 4.0 Business Property Market

### Introduction

- 4.1 This section reviews employment property markets. It provides an overview of the current national and regional property market and a more detailed analysis for Livingston.

### Scotland

- 4.2 Scottish GDP grew 1.0% during the first quarter of 2014. This contributed to annual growth of 2.6%<sup>11</sup>. The Scottish unemployment claimant count fell to 2.7% in August 2014, a fall of 1.0% over the 12 months period. The broader ILO measure of unemployment was similarly down by 1.4% over the 12 months to the period May/ July 2014, to 6.0%.
- 4.3 Fraser of Allander (June 2014) forecast Scotland's GDP growth at 2.5% in 2014 and a slightly lower rate of 2.2% in 2015. The consensus forecasts for UK economic growth published by HM Treasury in September 2014 are 3.0% for 2014 and 2.6% for 2015. Forecasts have been revised upwards as evidence mounts of a sustained economic recovery.
- 4.4 Occupier confidence in the Central Scotland industrial property market has improved and occupancy rates have increased. Demand is greatest for prime estates at trunk road locations. Speculative development is not yet being undertaken other than in exceptional circumstances.
- 4.5 Demand for office property across Scotland has accelerated as the economy recovered and as occupiers trade up to more modern premises. Speculative development has resumed in Glasgow and is emerging in Edinburgh as sites are prepared for the next market cycle. Market recovery to date has however been strongly focused upon prime locations in these major cities.

### West Lothian

- 4.6 The economy of West Lothian is built upon its central location and its easy access to the country's two largest cities: Glasgow and Edinburgh. This connectivity puts West Lothian at a strategic advantage to access suppliers and customers in both the east and west of the country. The economy is

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<sup>11</sup> Scottish Government Statistical Release 16 July 2014

based upon key sectors such as food and drink manufacture, distribution and logistics, construction, biotechnology and life sciences, financial services and retail<sup>12</sup>. Major employers in the region include Sky Television, Tesco, ASDA Walmart, Quintiles, Johnson & Johnson and Mitsubishi Electric.

- 4.7 West Lothian's economic output grew at an annual average rate of just over 3% between 1998 – 2008<sup>13</sup>. Analysts estimate the West Lothian economy recovered from recession of 2009 in 2012 – 2013 with +1.3% growth.
- 4.8 West Lothian's Economic Profile 2014 - 2015 provides data on the make-up of employers in the region. The portion of enterprises with fewer than 50 employees is 86% of the total registered enterprises compared with 96% for Scotland<sup>14</sup>. This data shows the significant presence of medium – large employers in West Lothian compared with other areas of Scotland. A large concentration of these companies are located in the key economic cluster around the M8 motorway corridor.

#### Livingston

- 4.9 Livingston is the largest settlement in West Lothian and is the centre of the local authority area's employment, retail and civic life. The rapid rise of Livingston as a population centre has corresponded with its growing role as the commercial centre of West Lothian. Its location at the heart of West Lothian and, therefore, central Scotland has facilitated this growth as has the good connections provided by proximity to the M8 motorway. The New Town's own internal road layout likewise facilitates ease of movement around the town and helps attract workers and employers to its various industrial and office locations. The main employment areas in Livingston are shown in Table 5.

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<sup>12</sup> West Lothian Economic Strategy 2010 – 2020.

<sup>13</sup> Experian Report to City of Edinburgh Council November 2009

<sup>14</sup> Businesses in Scotland, Scottish Government data release 2013

**Table 5: Principal employment locations in Livingston**

Estate and location	Details
Alba Campus/ Alba Innovations Centre	A modern business park built as an extensive to Kirkton Campus (see below). Occupiers including Quintiles, Scottish Water and Glenmorangie. Development land opportunities are currently available within the campus. Alba Innovation Centre provides full-serviced, flexible incubator space for technology companies and start-ups. Occupiers include a range of IT, design and electronics firms.
Almondvale Business Park	Self-contained office pavilions of between 3,000 – 5,000 sqm in a town centre location. Occupiers include HM Inspectorate of Education, GE Network Solutions and the NHS.
Brucefield Industrial Area	Owned by F&C REIT Asset Management and providing around 60,000 sqm of industrial accommodation. Four units are currently available and offer accommodation of around 295 sqm. Current occupiers include USC Group, Pollock Precision Engineering & C&M Scientific.
Deans Industrial Area	Lies to the North West of the settlement and just south of the M8 motorway via Junction 3A. It comprises a range of single-occupancy buildings, industrial and warehouse space and serviced offices and starter units for smaller businesses. Occupiers include Tesco, Christian Salvesen, BFP Wholesale, Schuh and Nisa.
Eliburn Campus	Provides opportunities for large scale business development and is designated an Enterprise Area by the Scottish Government. Gladman developments will develop industrial starter units, 80 residential units and a small retail development. The first phase of offices has been completed with occupiers including Gladman, Fibre Photonics and Provident Financial Management.
Fairways Business Park	A modern office development on the north side of Livingston, next to the M8 motorway and the Deer Park Country Club. Accommodation provides office space varying from 315sqm to 13,935 sqm. Two design and build opportunities are currently available. The park is managed by the Muir Group.
Houstoun Industrial Area	Located next to the M8 motorway junction 3 and to the North East of the town. Houstoun is one of the largest industrial areas in Central Scotland, offering a range of office, industrial and warehouse/ distribution space for a variety of occupiers.
Kirkton Campus	Provides a range of office and light industrial space close to the town centre. Occupiers include Sky Television, The Royal Bank of Scotland and Taylor Woodrow Developments.
Oakbank Park	Situated south east of the town centre and next to Calderwood Country Park. Small office, industrial units are available as well as land for development. Occupiers include Jabil Circuit, Intercell, Capital Communications and Removal Services Scotland.
Starlaw Business Park	Located to the west of Livingston and situated south of Deans Industrial Area. It offers office space, factory and workshop premises as well as storage and distribution. Occupiers include Martiniquaise, Flexible Surface Technology and Macrae Food Group. Owned by Paragon Inks (Holdings) Ltd.

Source: various

Industrial

- 4.10 Table 5 above indicates the main industrial locations within Livingston. These are situated in various locations around the town, most notably to the north and west to take advantage of strategic transport connections. These locations cater for a variety of office (class 4), industrial (class 5) and storage and distribution (class 6) operators.
- 4.11 Supply and take-up of industrial property in West Lothian on an annual basis is shown in Figure 4. Supply rose sharply when the Oracle Building in Linlithgow came onto the market, from around 700 sqm to 18,569 sqm in the second half of 2011.

**Figure 4: West Lothian industrial supply and take-up**



Source: CoStar

- 4.12 Take-up has stabilised at around 50,000 sqm in 2012 and 2013 after falling from 67,862 sqm in 2011. Take-up levels for 2014 have already exceeded the rate for 2013 and may pass 2011's figure if current levels of activity are maintained for the rest of the year. This suggests improved conditions in the industrial property markets which are in line with wider trends noted above.
- 4.13 Supply has shown a steady decrease since a high of 186,035 sqm in Q4 2012 to around 84,237 sqm in Q3 2014. Restrictions in supply of a range of industrial space for operators will normally result in an upward push on rents.

- 4.14 There are 41 industrial properties currently being marketed in Livingston. Table 6 below shows the breakdown of these units by sizeband. Available space is spread over most sizebands between 200 – 10,000 sqm. Around half of the supply, in terms of floorspace, is concentrated in six larger properties.

**Table 6: Supply of industrial property in Livingston**

Sizeband	No of units	sqm
0 – 99	0	0
100 – 199	2	268
200 – 499	9	3,055
500 – 999	10	7,861
1000 – 1999	5	6,027
2000 – 4999	9	25,263
5000 - 10000	6	42,083
10000+	0	0
<b>Total</b>	<b>41</b>	<b>84,557</b>

Source: CoStar

- 4.15 Since October 2009 a total of 224 units have been let or sold in Livingston. This equates to a total floorspace take-up of 243,357 sqm. Table 7 shows the breakdown of these deals by sizeband.

**Table 7: Take-up of industrial property in Livingston since Oct 2009**

Sizeband	No of units	sqm
0 – 99	55	3,096
100 – 199	33	4,661
200 – 499	53	16,693
500 – 999	24	18,859
1000 – 1999	27	36,390
2000 - 4999	24	76,174
5000 – 9999	3	19,479
100000 +	5	68,055
<b>Total</b>	<b>224</b>	<b>243,357</b>

Source: CoStar



- 4.16 Market activity is spread relatively evenly across all sizebands and includes 8 deals involving properties larger than 5,000 sqm.
- 4.17 A selection of these recent industrial transactions in Livingston is examined in more detail in Table 8. The occupiers in these deals represent a wide variety of sectors and include construction/ trades businesses, shipping and logistics, professional services, food and drink operators and leisure services providers.

**Table 8: Recent industrial property transactions in Livingston**

Address	Size (sqm)	Comments
6 – 9 Brewster Square, Brucefield Industrial Park	295	Let to The Larder Ltd in August 2014
Nettlehill Road, Houstoun Industrial Estate	15,561	Semi-Chem lease renewal at their existing premises on a 10-year term. July 2014
Unit 4, Kingsthorpe Park, Houstoun Industrial Estate	3,070	Let to Certas Energy Ltd on a 10-year lease. July 2014
Units 9 – 20 Knightsridge Industrial Estate	145	Ground floor unit let to Pure Flour Power Bakery Ltd from West Lothian Council. December 2013.
Units 1 – 8 Heron Square, Deans Industrial Park	284	Let to Space Solutions Ltd on a month-to-month lease from West Lothian Council. October 2013.
2 Oakbank Park Place, Oakbank Industrial Estate	754	Sold to Clancy Docwra Ltd for £525,000. March 2013
16 Grange Road, Houstoun Industrial Estate	3,270	Let to Mitsubishi Factory Ltd on a 2-year lease from Endura Ltd. February 2013.
6-9 Brewster Square, Brucefield Industry Park	289	Let to Astro Gymnastics on a five-year lease by Brucefield Estate Unit Trust.
The Innotek Centre, 3 Starlaw Road, Starlaw Business Park	4,088	Freehold purchased by undisclosed buyer. April 2012.
5 Royston Road, Deans Industrial Park	11,520	Let to Vion Food Group on a two-year lease. July 2011.
Units 1-10 St Andrews Way Business Units, St Andrews Way	140	Let to Able Platers Ltd on a month-to-month lease by West Lothian Council. June 2011.

Source: Ryden / CoStar

Office Property

4.18 Supply and take-up of office property in Livingston is shown on Figure 5 below.

**Figure 5: Livingston office supply and take-up**



Source: CoStar

4.19 Take-up since 2011 has shown little to suggest the wider economic recovery is making an impact on occupier activity in the Livingston office market. Analysis shows much of the recent activity has been in the smaller sizebands with most lettings agreed on flexible terms with short lease lengths.

4.20 Supply has increased since 2012 and remains above 35,000 sqm to date. Occupiers looking for office space have a range of options in various locations around Livingston. Much of the current supply is in the 200 sqm + sizeband which suggests that demand for offices at the smallest sizebands is not been met by the supply.

4.21 There are currently 63 office properties available in Livingston totalling 43,758 sqm. Table 9 shows the breakdown of these units by sizeband. Supply is concentrated on properties between 200 - 1,000 sqm. Only 21% of properties (13 out of 63) available are smaller than 200 sqm which suggests current supply is unaligned with take-up demand.

**Table 9: Supply of office property in Livingston**

Sizeband	No of units	sqm.
0 – 99	7	415
100 – 199	6	994
200 – 499	22	7,350
500 – 999	14	10,207
1000 – 1999	9	12,074
2000 - 4999	5	12,718
5000 – 9999	0	0
10000+	0	0
<b>Total</b>	<b>63</b>	<b>43,758</b>

Source: CoStar

- 4.22 Since October 2009 a total of 168 offices have been let or sold in Livingston (Table 10). All office deals have involved properties smaller than 2,000 sqm and over half of all transactions have involved offices smaller than 100 sqm.

**Table 10: Take-up of office property in Livingston since Oct 2009**

Sizeband	No of units	sqm.
0 – 99	91	3,596
100 – 199	33	4,393
200 – 499	34	10,826
500 – 999	7	4,257
1000 – 1999	3	4,056
2000 – 4999	0	0
5000 – 9999	0	0
10000 +	0	0
<b>Total</b>	<b>168</b>	<b>27,128</b>

Source: CoStar

- 4.23 Recent office transactions in the region are shown in Table 11. The deals recorded show demand for small offices on flexible, short-term lets from a wide variety of occupiers working in a range of economic sectors.

**Table 11: Recent office transactions in Livingston**

Address	Size (sqm)	Comments
Unit 4, Houstoun Interchange, Houstoun Road	122	Let to Pertemps Ltd by Errigal Developments Ltd. June 2014.
Building 1, New Houstoun Business Park	193	Let to Muller Wiseman Dairies on a three-year lease. May 2014.
Suite 8, Eucal Business Centre, Craigshill Road	62	Let to Fair Deal Cabs Ltd on a one-year lease from Bizspace Ltd. June 2014.
Fairways Business Park, Deer Park Avenue	346	Let to Syngro Ltd from J W Muir (Property Investments) Ltd. May 2014.
Ionracus House, Allen Road	533	Purchased by Werstand Properties Ltd from TwentyFour 7 Ltd. March 2014.
Lennox House, Almondvale Boulevard	369	Purchased by an undisclosed buyer from Clowes Developments (UK) Ltd. February 2014.

*Source: Costar*

### Summary

- 4.24 The business property market in Livingston is becoming active and showing signs of recovery from the economic downturn. Occupiers have a range of options in terms of accommodation across Livingston and the town boasts many well-positioned employment locations to attract new businesses and support the growth of indigenous enterprises.
- 4.25 The supply of industrial properties has fallen in recent years whilst take-up has remained stable, although with signs of an improving market in 2014. Restrictions in industrial property supply could limit options to expanding businesses which may lead to a rise in rents. Take-up over the last five years has incorporated a variety of sizebands and has resulted in a restriction on supply of industrial space in particular smaller than 200 sqm. Properties at the larger end of size-scale remain available, as do several design and build opportunities at established business parks. Analysis shows that Livingston has less than two years supply of industrial floorspace.

- 4.26 Unlike industrial properties where supply is has fallen, there remains a plentiful supply of office space in Livingston. The gap between supply and take-up has broadened in recent years. Recent activity in the office market has focussed on properties smaller than 100 sqm. Much of this activity could be accommodated within existing supply as larger units are sub-divided to accommodate requirements for smaller space. Analysis shows that Livingston has around seven years supply of office floorspace.

## 5.0 Almond North Market Potential

- 5.1 This section reviews the subject site's prospects for employment use in light of the analysis provided in the above sections. In view of these market findings, it goes on to consider the site's wider potential for mixed-use development.
- 5.2 Section 4 illustrated an active industrial market in which supply is falling and options for smaller occupants are becoming more scarce. The office market is also focussed on the smaller end of the size-scale, but by contrast is a market in which occupiers have more choice and owners need to provide incentives to attract interest. Development can be difficult to promote in a market where demand can be easily met by existing stock.
- 5.3 Employment land take-up, as described in Section 3.0, shows a historic take-up of employment land in West Lothian at 5ha. per annum. On this basis, the current supply of employment land of 83ha. of undeveloped employment use allocations equates to around a 17-year supply, which could rise to around 30 years if employment land with only minor constraints is considered (ahead of locations with major constraints). This figure will rise significantly if Core Development Area allocations and other safeguarded locations are included in the supply figures. Livingston has 143ha. of undeveloped employment land, excluding the subject site.

### Almond North Employment Development Potential

- 5.4 The location of the subject sites (EOI – 0012 & EOI – 0013) restrict the potential for development of the site for employment use. Historic land transactions and market intelligence confirm development demand for locations close to motorway junctions or similarly prominent and accessible locations. Analysis of remaining employment land within existing allocations (see Appendix) suggests that Almond North is a secondary location within the development pipeline and is at best a long-term prospect to attract interests from the employment property development market.
- 5.5 In terms of potential occupier demand, industrial users again prefer motorway junctions and prominent sites for larger national and regional manufacturing and logistics requirements; and these are relatively few in the market place. More localised industrial demand from industrialist, for storage and from trade users prefers established existing estates and/ or sites in the urban core area close to potential customers and suppliers.

- 5.6 Medium-sized industrial user potential may exist at Almond North. This report has demonstrated a tightening supply of industrial space at the smaller end of the size-bracket and an increasingly active industrial property market for flexible, good quality accommodation for local and regional industrial, manufacturing business services and logistics firms. Development potential for this market sector is judged to be around 4-6 hectares over a period of at least 10 years.
- 5.7 Larger office requirements seldom consider Livingston; demand for large office floorspace is typically satisfied within Glasgow or Edinburgh. Mobile regional demand does exist from financial and business services companies and other service sector users, but is typically much smaller and can be satisfied within existing stock, where sub-division of space can give landlords the flexibility to let larger floorspaces to multiple tenants. The prospects for office development at Almond North are currently very poor.
- 5.8 In terms of development viability, it would not be commercially viable to create speculative new employment space at Almond North, and development would not provide a means to fund infrastructure and site servicing. Industrial rents for good quality stock are typically around £46 per sqm and office rents around £64-86 per sqm. Development land for industrial use in Livingston is typically valued at around £370,000 per hectare.
- 5.9 Stretching the envelope to consider employment-generating uses rather than just planning policy employments uses, commercial activity such as hotel and leisure operators will also seek visibility and prominence and look to locations that are easily accessible to the motorway or urbanised locations such as town and city centres. Transport interchanges are key locational requirements for these commercial operators and the subject site at Almond North cannot offer these benefits in the way other locations can.
- 5.10 For residential development, which is not compatible with the current planning policy zoning for Almond North, the site offers several benefits in terms of market potential. Although there are no housing areas in the immediate vicinity, the site is “suburban” in character and could offer high residential amenity due to its countryside aspect and semi-rural outlook. As a residential market, Livingston is strong and interest in land for residential development is high. Demographic data demonstrates Livingston’s attractiveness to younger families as a place to live and many housebuilders are keen to meet this demand with a good variety of products in well-positioned sites.

- 5.11 This development potential of Almond North beyond employment use could help to promote the wider area as a mixed-use urban expansion of the town. The neighbouring site, EOI – 0173, is under the ownership of West Lothian Council and could be assembled along with the subject sites to enable strategic infrastructure investment and site servicing through higher land values (and also develop a strategy for dealing with land sterilised by the ethylene pipeline). This would take the site area to 30 hectares or more. Employment uses within such a strategic development could include both industrial and higher amenity activities, complementary to and following on from the Livingston Enterprise Area to the north-east of the subject site.
- 5.12 Residential and supporting community uses could be deliverable, along with high amenity employment uses such as Research and Development office/ workshop space, medium-sized industrial space and community infrastructure such as schools, health centres, local retail services and open space/ green infrastructure could all combine to create a logical expansion of Livingston's urban footprint. The optimum balance between higher value uses, ancillary uses and employment land would need to be investigated in depth.



## 6.0 Summary and Conclusions

- 6.1 Dalmeny Estate instructed property consultants Ryden to investigate employment land and property markets in West Lothian and Livingston. The purpose is to establish market potential for land at Almond North, Livingston.
- 6.2 Recent analysis of employment land provision in West Lothian indicates 83ha. of immediately available land. This equates to 17 years' supply, which would rise to around 30 years' supply if land with only minor constraints is also considered to be effective. It does take into account the employment development potential of majorly constrained locations, or safeguarded land, or Core Development Areas. The subject site is currently not part of the effective employment land supply.
- 6.3 Livingston's industrial property market is performing well and showing signs of greater activity in 2014. Take-up has created pressure points for small units of less than 200 sqm. and generally given that the town now has less than two years' supply of industrial accommodation on the market. Supply of offices is more plentiful at around 7 years', although there is a pinch-point for office suites smaller than 100 sqm. which may require some building adaptations to accommodate future market demand.
- 6.4 The subject site at Almond North comprises MIR references EOI-0012 and EOI-0013 and extends to approximately 24.4ha. The subject site is in a secondary location and has major constraints which prevent it from being considered in planning policy terms as effective for employment use. Sectoral market reviews suggests that the site's best prospects within the employment uses classes would be for an estate targeting medium-sized industrial/logistics users of around 4-6 hectares (approximately 20-25% of the total site). This development would not be commercially viable, and furthermore could not fund the infrastructure or servicing costs associated with a majorly constrained site.
- 6.5 The most effective means of securing successful employment uses at Almond North would be as part of a strategic approach to development of the area which would include the subject site and contiguous land parcel(s), totalling at least 30 hectares. This wider location would lend itself to the creation of a high residential amenity to meet strong local demand in Livingston, potentially enabling through higher land values the provision of strategic infrastructure, site servicing and addressing land sterilised by the ethylene pipeline.

- 6.6 Employment uses within such a strategic development could include both industrial and higher amenity activities, complementary to and following on from the Livingston Enterprise Area to the north-east of the subject site. Community infrastructure such as schools, health centres, local retail services and open space/ green infrastructure could all combine to create a logical expansion of Livingston's urban footprint. The optimum balance between higher value uses, ancillary uses and employment land would need to be investigated in depth. In the absence of such an approach, Almond North is expected to remain as undeveloped as an employment site with major constraints into the long term.

**Ryden**  
**October 2014**

## APPENDIX

Site Reference	Industrial Estate	Address	Site Area (Ha)	Status	Remaining Site Area (Ha)
ELv2	Brucefield Industrial Park	Brucefield Park West	2.19	Not Started	2.19
ELv3	Brucefield Industrial Park	Brucefield East	0.94	Not Started	0.94
ELv63	Brucefield Industrial Park	Brucefield North	0.77	Not Started	0.77
ELv5	Deans Industrial Estate	Nairn Road, North East	2.04	Not Started	2.04
ELv9a	Deans Industrial Estate	Dunlop Square West	1.32	Started	1.32
ELv9b	Deans Industrial Estate	Dunlop Square West	0.23	Started	0.23
ELv15	Deans Industrial Estate	Caputhall Road East	0.68	Not Started	0.68
ELv16	Deans Industrial Estate	Caputhall Road Central	0.58	Not Started	0.58
ELv17a	Deans Industrial Estate	Caputhall Road West	0.11	Not Started	0.11
ELv17b	Deans Industrial Estate	Caputhall Road East	0.18	Not Started	0.18
ELv18	Deans Industrial Estate	Caputhall Road	1.98	Not Started	1.98
ELv21	Eliburn Campus	Appleton Parkway West	12.0	Not Started	12.0
ELv22	Eliburn Campus	Appleton Parkway North West	0.74	Not Started	0.74
ELv23	Eliburn Campus	Appleton Parkway North East	5.58	Not Started	5.58
ELv24	Eliburn Campus	Houstoun Road North	5.78	Not Started	5.78
ELv25	Eliburn Campus	Appleton Parkway East	12.9	Not Started	12.9
ELv26	Eliburn Campus	Appleton Parkway South	5.75	Not Started	5.75
ELv27	Eliburn Campus	Appleton Parkway South West	0.9	Not Started	0.9
ELv28	Eliburn Campus	Appleton Parkway South East	5.13	Started	2.0
ELv30	Houstoun Industrial Estate	Nettlehill Road West	2.06	Not Started	2.06
ELv32	Houstoun Industrial Estate	Firth Road West	0.84	Not Started	0.84
ELv34	Houstoun Industrial Estate	Firth Road South	2.38	Not Started	2.38
ELv36	Houstoun Industrial Estate	Nettlehill Road East	1.47	Started	1.47
ELv62	Houstoun Industrial Estate	Houstoun Interchange East	1.31	Completed	0
ELv37	Kirkton Campus	Simpson Parkway	0.65	Completed	0
ELv43	Kirkton Campus	Macintosh Road	4.79	Not Started	4.79
ELv44	Kirkton Campus	Macintosh Road West	0.89	Not Started	0.89
ELv45	Kirkton Campus	Kirkton South Road	0.93	Not Started	0.93
ELv46	Kirkton Campus	Gregory Road East	3.31	Not Started	3.31
ELv47	Kirkton Campus	Gregory Road West	1.37	Not Started	1.37
ELv48	Kirkton Campus	Gregory Road	7.98	Not Started	7.98
ELv49	Kirkton Campus	Gregory Road	0.8	Not Started	0.8
ELv52	Kirkton Campus	Allen Road	1.09	Completed	0
ELv39a	Alba Campus	Former Rosebank Nursery	0.92	Not Started	0.92
ELv39b	Alba Campus	Former Rosebank Nursery	1.57	Not Started	1.57
ELv39c	Alba Campus	Former Rosebank Nursery	2.14	Not Started	2.14

ELv39d	Alba Campus	Former Rosebank Nursery	3.67	Not Started	3.67
ELv41a	Alba Campus	Quintiles, Kirkton Campus	5.34	Completed	0
ELv41b	Alba Campus	Glenmorangie, Kirkton Campus	12.43	Completed	6.33
ELv41c	Alba Campus	Miller, Kirkton Campus	2.89	Completed	0
ELv41d	Alba Campus	Miller, Kirkton Campus	1.53	Not Started	1.53
ELv41e	Alba Campus	Cadence, Kirkton Campus	3.04	Started	3.04
ELv41f	Alba Campus	Miller Developments, Kirkton Campus	1.2	Started	0
ELv41g	Alba Campus	Incubation Centre, Kirkton Campus	0.5	Completed	0
ELv59a	Intercell, Oakbank/ Linhouse	Williamston North	0.8	Started	0.8
ELv59b	Jack Ness, Oakbank/ Linhouse	Williamston North	0.32	Started	0.32
ELv59c	Pennant Plant, Oakbank/ Linhouse	Williamston North	0.5	Not Started	0.5
ELv59d	M&M/ Freedom SIPP, Oakbank/ Linhouse	Williamston North	1.8	Not Started	1.8
ELv60	Oakbank/ Linhouse (WLC)	Williamston South	7.9	Not Started	7.9
ELv57a	Ashwood, Starlaw	Starlaw Park	0.82	Completed	0
ELv57b	Scottish Enterprise, Starlaw	Starlaw Park	4.52	Not Started	4.52
ELv57c	Paragon Inks, Starlaw	Starlaw Park	0.55	Not Started	0.55
ELv57d	Thomas Mitchell Developments, Starlaw	Starlaw Park	0.79	Not Started	0.79
ELv57e	Macrae Seafood, Starlaw	Starlaw Park	0.32	Completed	0
ELv61	Deer Park Business Park	Deer Park	0.8	Not Started	0.8
ELv64	Beugh Bur	Beugh Bur	27.61	Started	22.31
<b>Total Allocation</b>			<b>171.63</b>		
<b>Total Remaining</b>			<b>142.98</b>		
<b>Total Completed</b>			<b>25.35</b>		



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