Local Development Plan Background Evidence

2. The Economy

6/15/2011

Contents

1. Introduction

1.1 The Local Development Plan (LDP) must set identify sufficient land to meet the needs for employment land for its area. It must focus on the main proposals for development for the plan period although it is helpful to give clarity on options for development beyond that time.

1.2 This report sets out the rationale for the new employment land identified in the LDP. It looks at the evidence which exists, the demand information gathered as part of a study commissioned to support the LDP and any available information published by the Local Authorities.

2. Policy Framework

The National Park Plan (2007-2012)

2.1 The LDP is a key tool in the delivery of the vision and outcomes of the National Park Plan (NPP)[1]. The NPP provides an overarching context for development planning and development management within the National Park. The long term vision for the National Park needs communities that are sustainable in social, economic and environmental terms. To achieve this it sets a number of strategic objectives which are aimed at achieving sustainable growth of the economy which it recognises as being key to supporting sustainable communities and creating a strong and vibrant National Park which also stimulates and supports the wider regional economy.

- Create conditions conducive to business growth and investment that are consistent with the special qualities of the Park and its strategic location
- Encourage entrepreneurship, especially in young people and in sectors which complement the special qualities of the Park
- Promote 'green business' opportunities
- Promote opportunities for economic diversification across all areas of the Park
- Address barriers to employment uptake
- Raise the profile and excellence of local produce and services
- Promote access to education and vocational training in all levels across the Park
- Ensure a match between training provision and current/future skills needed.

2.2 In its aspirations relating the economy and employment, the NPP also sets a series of strategic objectives for land management which are also relevant.

[1] Cairngorms National Park Plan 2007

2.3 Whilst it is important to remember that the NPP is currently being reviewed, it is still the key document which guides the overarching context for development planning and development management until it is formally replaced. The LDP will however take cognizance of the ongoing work to revise the NPP to ensure the two documents will be in accord on completion.

SPP

2.4 SPP[2] is clear that the planning system should proactively support development that will contribute to sustainable economic growth and to highly quality sustainable places. It should enable the development of growth enhancing activities across Scotland while protecting and enhancing the quality of the natural and built environment which is an asset for that growth. We should recognise and respond to economic and financial conditions in considering proposals that could contribute to economic growth.

2.5 Planning authorities are directed to ensure there is a range and choice of marketable sites and locations for businesses allocated in development plans. This is to include opportunities for mixed use development to meet anticipated requirements and a variety of size of quality requirements. The supply of suitable sites should be reviewed regularly and new sites brought forward where existing allocations do not meet current and anticipated market expectations. The specific needs of different businesses should be taken into account in development plans, including the importance of access to the transport network.

2.6 Development plans should also support small business development and growth and promote opportunities for low impact industrial, business and service uses which can co-exist with housing and other sensitive uses without eroding amenity. We should adopt a flexible approach to working from home where the amenity of surrounding properties will not be significantly affected.

2.7 New development should safeguard and enhance the area's environmental quality and promote opportunities for enhancement and regeneration where appropriate.

Economic Strategies

Government Economic Strategy

2.8 The Government Economic Strategy sets out how sustainable economic growth will be achieved.[3] It identifies five strategic priorities that are critical to economic growth – learning, skills and wellbeing, supportive business environment, infrastructure development and place, effective government, and equity.

Aberdeenshire Council

2.9 Although much of the economic strategic guidance and direction provided by Aberdeen City and Shire focuses on the city and its immediate hinterland, it is still important that we, in the National Park take proper account of the growth aspirations, and play what part we can in realising them within that part of Aberdeenshire that falls within the National Park Boundary. The Economic Manifesto's vision[4] is to achieve an economy which is one of the most robust and resilient in Europe, with a reputation for opportunity, enterprise and inventiveness. This will be done in the context of high quality options for growth in an environment that is interesting and enjoyable.

2.10 Eight strategic priorities to achieve this vision have been identified. Those most relevant to our part of Aberdeenshire are

[2] Scottish Planning Policy 2010 para 33

[3] The Government Economic Strategy 2007

[4] Building on Energy – The Economic Manifesto for Aberdeen City and Shire 2007

- Deliver a fully integrated transport network
- Maximise our intellectual capital – people and expertise
- Attract and develop skilled people
- Improve the efficiency of planning decision making

To achieve these, availability and access to land for expansion is critical.

The Highland Council

2.11 Highland Council is committed to a number of areas of work to support economic development across the Highlands[5]. Of particular relevance to the Local Development Plan are:

- Recognise and support the importance of the Cairngorms National Park to the Highland economy
- Work with HIE, Scottish Development International and statutory infrastructure providers to make the Highlands one of the most attractive places to do business in Scotland.
- Work with the Scottish and UK Governments and partners to prevent and reduce poverty by supporting more people into sustained employment.
- Continue to decentralise Council jobs throughout the Highlands and work with partners to identify opportunities for further dispersal of public sector jobs.

2.12 To achieve these commitments, we must ensure a suitably supportive development plan allows for appropriate development which supports the economic, and is suitably flexible to react to the dynamic economic situation found in this part of Scotland.

Moray Council

2.13 A major new economic strategy is being developed by Moray Council. It will supersede the existing Moray 2020 document and will set the long term economic diversification strategy for the area.

2.14 A small part of Moray Council falls within the National Park and the economic strategy will apply to that area around Tomintoul and Glen Livet. This is an area which has suffered as a result of the current economic climate. Business closures have had a detrimental impact on the community as a whole.

2.15 Whilst undoubtedly the Council strategy will deal with the impact of RAF Kinloss and continued uncertainty over RAF Lossiemouth, it is will also give direction to the whole of the Council area.

Perth and Kinross Council

2.16 Perth and Kinross Council have a vision for their communities "we will create and sustain vibrant, safe, healthy and inclusive communities in which people are respected, nurtured and supported and where learning and enterprise are promoted"[6] and to achieve this, they have recently reviewed their Economic Strategy to take account of recent changes in the national and local economy. As part of this strategy, there are a number of priorities, some of which are relevant for that part of Perth and Kinross which falls within the National Park boundary.

- Provide focused, joined up and appropriate business advice and support
- Focus on growth opportunities (including tourism, renewable energy and the general insurance sector)

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[5] Highland Council Corporate Plan and Council Programme 2009-2011

[6] Perth and Kinross Community Plan 2006-2020

2.17 Clearly the provision of appropriate amounts of land to meet the needs of the business sector in that part of the Park is important if these priorities are to be achieved.

3. Employment Land Audits

3.1 SPP directs local authorities to carry out a regular review of the available land for economic growth to ensure it is appropriate and effective. Within the National Park Aberdeenshire Council prepare an annual review.[7] Only one site falls within the National Park boundary. The site at Tullich Road provides 0.4ha of effective land to meet the local demand. The other Local Authorities Do not have no current audits to help inform the Main Issues Report.

4. Development Land for Commercial and Industrial Use Study

4.1 CNPA together with Highlands and Islands Enterprise commissioned a review of the supply of and demand for development land for commercial and industrial use within the National Park.[8] Specifically this study looked at land suitable for development falling within Use Classes 4, 5 and 6 of the Town and Country Planning Use Classes Order (Scotland) 1997.

4.2 Historically CNPA have had difficulty gauging need and demand for commercial land. This study targeted key businesses and organisations to assess their future requirements, and provide robust evidence of demand. The study also assessed existing supply both allocated in the adopted Local Plan and in established commercial sites.

4.3 The research found limited demand, with 5 companies with active requirements for land totally 12 to 12.5 acres. However the study does conclude that with the unique economy in the Park and its increasing population there is undoubtedly a need to have cost effective viable development land, certainly in the larger settlements.

4.4 The Local Development Plan must therefore plan ahead and provide sufficient flexibility to react to unknown demand in support of a sustainable and thriving economy. The study suggests two options to achieve this, and we agree that focusing on a number of strategic sites across the Park, matching the settlement strategy is the most appropriate way forward. Other land should, however also be included where it supports the local community.

[7] Aberdeen City and Shire Employment Land Audit 2010 – see appendix 1

[8] Development Plan for Commercial and Industrial use 2011

5. The Economic and Social Health of the CNP 2010

5.1 In 2010 CNPA commissioned a study[9] to establish the economic and social baseline of the communities in and around the National Park. This report is useful to the Local Development Plan as it highlights particular parts of the economy of which we must be aware. An appropriate policy framework must be put in place to support these in the future.

5.2 This report concludes that the structure of the Cairngorms economy is highly unusual, with a distinctive mix of industries contributing to the area's creation of wealth. Whisky production, forest products and are particularly distinctive. The area also includes the most tourism-focused parts of Scotland. Recent growth in the importance of the public sector, land based industries, the food and agriculture sectors all add to the dynamics of the economy.

5.3 The Cairngorms is also home to a small number of significant manufacturing operations. Their main trade links are usually with organisations outwith the Park and they tend to either be long established organisations which have diversified into new fields or they have located in the area thanks to the high quality natural environment. There is evidence that the region is becoming an attractive base for relatively footloose sophisticated industries. In the study a cluster of creative, media and knowledge based businesses is identified. This contributes an estimated £4 million of value added to the Cairngorms economy each year.

5.4 The Local Development Plan must make appropriate provision for all these sectors, and anticipate the likely demands, principally on the need for land specifically allocated for that use, and on the need for a flexible but supportive policy framework to facilitate appropriate growth and investment.

[9] The Economic and Social Health of the Cairngorms National Park 2010

6. Monitoring the health of our town centres

6.1 The Local Development Plan must take account of the current economic position within the key areas of economic activity in the Park. As a result the town centres of the main settlements have been surveyed.

6.2 *"Town Centre are a key element of the economic and social fabric of Scotland, acting as centres of employment and services for local communities and a focus for civic activity."* [10] The Local Development Plan should enable gaps and deficiencies in town centres to be remedied by identifying appropriate locations for new development and regeneration. SPP goes on to clarify that "*to be identified as a town centre a diverse mix of uses and attributes, including a high level of accessibility, must be provided*." Successful town centres provide a diverse range of community and commercial activities, including places of employment, open spaces and meeting places. They are a mix of interdependent land uses which, when taken together with their physical structure, should create a unique sense of place, character and identity. Retail and leisure provision are fundamental to the concentration of other activities located in town centres.

6.3 To inform the approach taken in the LDP an assessment of all the town centres in the Cairngorms National Park has been undertaken. This has taken the form of a Health Check. Planning Advice Note 59 gives us direction on how to conduct a Health Check, and this approach is the one used across the National Park. Health checks can then be used to town centre strategies and for subsequent positive action to improve quality and competitiveness.

6.4 A health check is the appropriate monitoring tool to measure the strengths and weaknesses of a town centre and to analyse the factors which contribute to its vitality and viability ('V&V indicators').

- **Vitality** is a measure of how lively and busy a town centre is;
- **Viability** is a measure of its capacity to attract ongoing investment, for maintenance, improvement and adaptation to changing needs.

6.5 Together these measures give an indication of the health of a town centre and, when used consistently over a period of time, can demonstrate changes in performance that can inform future decision making. A range of key performance indicators can be used to provide an effective insight into the performance of a centre and so offer a framework for assessing vitality and viability. For example:

- **Pedestrian flow** (footfall) measures the numbers and movement of people on the streets. Counts should be collected on a consistent basis over a period of time, at different locations and times.
- **Prime rental values** provide a measure of the relative position of locations or streets within a centre and give an indication of retailer desire to locate within an area.
- **Space** in use for different town centre functions and how it has changed.
- **Retailer representation and intentions**: national multiples and independents.
- **Commercial yield**. Although a valuable indicator of retail viability, it needs to be used with care as, in part, it reflects a developer's, rather than a retailer's, interest in locating in an area.
- **Vacancy rates**, particularly street level vacancy in prime retail areas.
- **Physical structure** of the centre, including opportunities and constraints, and its accessibility.
- **Periodic surveys** of consumers.

[10] SPP 2010

- **Crime** – co-operation with the local police Architectural Liaison Service can assist in identifying persistent or potential problems in an area.

6.6 A number of other indicators are also recognised, including: accessibility, environmental quality, turnover, available expenditure and competing investment and tourism.

6.7 The main purposes of collecting V&V data generally relate to the following key functions:

- To support the preparation and implementation of development plan policies and proposals for town centres;
- To inform proactive planning and investment for Town Centres Strategies acting as a baseline for investment decisions and priorities over time;
- For development management purposes for the assessment of retail proposals.

CNP Town Centre Health Checks

6.8 Health checks have been undertaken in each of the Cairngorms National Park's strategic settlements as identified in the CNP Local Plan – Aviemore, Ballater, Grantown On Spey, Kingussie and Newtonmore. These 'checks' are based on a site survey-based assessment on provision and perceptions of the centres and are a good way of gauging the vitality and viability of town/village centres. Overall judgements are made on site inspections only. The checks have been applied to 2 distinct areas: within identified town/village centres (typically the traditional High Street and other areas identified as containing the commercial/social and core functions of a town) and within edge of town/village centres which are peripheral areas but with some of the main functions or facilities. The 2010 health check provides a baseline for future monitoring, allowing for ongoing and comparative review of the performance of the centres.

Summary of indicators - Retailer Representation

6.9 Successful centres should have a good range of shops including specialist independents (eg deli's) and national multiple retailers (eg Cooperative or Tesco's).

6.10 In all of the strategic settlement centres with the exception of Aviemore, specialist independent stores are dominant. The Co-operative food store does however occur in almost ever communities (again with the exception of Aviemore). Small, independents ranging from deli's to gunsmiths and galleries make up the majority of stock.

	Specialist Independents	National multiple retailers	Charity Shops	Vacancies
Aviemore	10	16	2	1
Ballater	21	2	1	4
Grantown On Spey	23	4	1	6
Kingussie	15	2	0	4
Newtonmore	4	1	1	3

Summary of indicators - Diversity of uses

6.12 Successful centres should be diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day; the importance of diversity to the success of a centre ensures it should be more than just retail – various uses and a broad range of facilities are to be assessed.

6.13 The number of office premises is limited mainly to estate agents, solicitors, CNPA and the various Councils. A prominent feature of all the strategic settlement centres is the number of cafes, takeaways and restaurants. Aviemore has the highest number of these functions. Many of these places offer a variety of functions from café, bistro and bar uses often within hotels. This emphasises the role of the centres as tourist hubs for the Park and beyond.

	Offices	Cafes and Tearooms	Restaurants	Bars
Aviemore	2	4	9	5
Ballater	6	4	3	2
Grantown On Spey	8	2	2	2
Kingussie	5	5	2	4
Newtonmore	0	4	4	4

Summary of indicators - Environmental Quality

6.14 This is measured using an appraisal of the centre considering the appearance of the environment, the quality of its buildings, the public spaces, its sense of place, cleanliness, signs of decay and neglect and visitor infrastructure.

6.15 Many of the centres benefit from a distinct sense of place, and high quality environment with good green spaces. Ballater and Grantown on Spey are particularly noteworthy. All were clean, without any tangible signs of neglect or decline. Limited signs of investment were also present in Aviemore, Ballater and Grantown.

Summary of indicators - Accessibility

6.16 Access is measured using a number of factors including the quality and frequency of public transport, adequacy of car parking, ease of pedestrian movement (ie no barriers to desire lines, wide pavements etc), traffic impact – whether its located on a busy main road, is it traffic calmed or does it suffer from chaotic car parking.

6.17 Many of the centres were to some degree blighted by high volumes of through traffic and high levels of car parking principally on the main streets. This is to be expected during the high points of the tourist season. Aviemore in particular suffers badly. Some chaotic car parking seemed to disrupt traffic flows especially in Kingussie. Public Transport provision appears to be good in the majority of centres.

Summary of indicators - Tourism

6.18 Visitor facilities are recorded, including the range and quality of visitor attractions, information and signage.

6.19 Given the predominance of the tourist industry in many of the centres, tourist attractions are generally lacking as are information points and signage. All had Tourist Information Centres. Newtonmore, in particular, provided good levels of tourist facilities.

Conclusions from town centre health check

6.20 The surveys have showed our town centres to be an above average position. Every effort should be made to ensure this position continues and improves where possible. The Local Development Plan should therefore make appropriate provision for positive support for the town centres found in the Park.

7. Key issues for the Local Development Plan to address

7.1 Based on the information available, the Local Development Plan will have to identify land to support the economy of the Park. In light of the lack of empirical information on land requirements a supportive policy framework will also be required. This dual approach will help direct any identified need to appropriate sites, but also allow for appropriate ad hoc development which supports and grows the economy.

8. Assumptions and Flexibility

8.1 The CNPA must be satisfied that it has made every effort to identify need and demand for economic and industrial land it its preparation of the Local Development Plan.

8.2 We must consider the level of available information and provide support through the planning system for appropriate development.

8.3 A degree of flexibility must also be included to ensure that the whole of the Park has sufficient provision to meet the need and demand. The geography of the Park creates a number of market areas. Provision in one will not necessarily meet the needs of another.

9. The employment land requirement and the current Local Plan

9.1 The current adopted Local Plan provides for some economic opportunity, and supports existing businesses. It did not however identify many opportunities for new investment. This stemmed for a lack of empirical evidence to support the identification of sites to meet both the need and demand. The Plan did however recognise that there is undoubtedly an unidentified need and demand for investment opportunity. To deal with this a suite of supportive policies were included.

10. The Employment Land requirement and the LDP

10.1 In developing the LDP CNPA identified there to be a lack of available information to guide development planning for this sector. The various studies referred to above were therefore commissioned to assess both need and demand. It is interesting that the study on Development Land for Commercial and Industrial Use found little empirical need or demand for the identification of new land for investment. Anecdotal information does however point to demand particularly for small start up business units to house office and light industrial accommodation.

10.2 Focusing investment on strategic settlements best able to cope with new development is therefore seen as the best approach to guide investment.

11. Conclusions

11.1 The economy of the Park and the way it supports our communities is a key focus for the Local Development Plan. Sustainable economic growth remains a key objective of the Scottish Government and the Plan must facilitate this in a way best fitting to the special qualities of the Park.

11.2 CNPA has made every effort to assess both the need and demand for additional land to support this sector. It has also completed further baseline assessments to inform the approach to take in planning for the future.

11.3 There is little empirical evidence of need for additional land for investment. However there is clearly a need for the LDP to provide appropriate support to the right form of development which supports both the economy of the Park and its communities.

11.4 The LDP must therefore direct new development to the most appropriate location. The strategic settlements are the most sustainable location for this growth, and building on existing industrial and commercial sections within these settlements focuses businesses together. To ensure appropriate support is given to other ad hoc development which supports both the economy and the aims of the Park the LDP must include a framework of policies to guide investment.

12. Appendices

Appendix 1	Detailed Town Centre Health Survey Results
Appendix 2	Aberdeen City and Shire employment land audit 2010 (extract)
Appendix 3	Development land for commercial and industrial use report

Appendix 1 Detailed Town Centre Health Survey Results

Ranking used

The Town Centre Health Survey used a number of indicators

- Retail representation
- Diversity of uses
- Environmental quality
- Accessibility
- tourism

Each indicator is scored on a scale of 1 – 5.

Score	Rating
1	Very Poor
2	Poor
3	Average
4	Good
5	Very Good

Aviemore -

Survey date: 20th July 2010 (RG)

Vitality and Viability Performance Indicators:

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer Representation (good range of shops)	Multiple (National) Retailers	16 *no*
	Independent specialist Shops	10 *no*
	Charity/Discount Shops	2 *no*
	Range of Food Shopping (convenience or supermarket)	2*no* Score: 4
	Range of shops overall	Score 3
	Vacant premises rate (occupancy levels)	1*no*
	Investment by Retailers (evidence of improvements etc)	4 – new builds
Space in use for different functions (diversity of uses)	offices (financial and professional services)	2 *no*
	Cafes, tea rooms, pubs, restaurants	17 *no*
	Community/other facilities (specify)	Library, community hall
	Essential Rural services – post office, banks etc (specify)	Post Office, banks
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 4
	Investment by users (evidence of improvements etc)	Score: 4
Environmental Quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	
	Signs of recent investment/improvements	Retail unit construction
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 3
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score 2
	Visitor information, signage	Score 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)

- Very high levels of through traffic, some buildings of character and note
- AHR gap site – improvement works needed

SWOT Analysis

Strengths	Opportunities
• Large visitor numbers, • number of independent specialist shops, • Tourist Resort focus,	• Public realm improvements,
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail only, TIC • No real built heritage, landmarks • Lack of choice – accommodation, visitor amenities etc • lack of attractive green spaces	• Lack of tourist info and facilities; • Increased car parking pressures, traffic volume; • Large numbers of cafes, restaurants, sports shops– over dominant; • High retail/sportswear dependency; • Seasonal visitor pull

Inventory

Grampian Road	Name	Goad Classification
1.	Mackenzie's Highland Inn	LS9
2.	A.Munro & Co./Remax/ A. Stewart Financial Advisor	OFF1
3.	Winking Owl, 2 Hoots	LS10
4.	VACANT (former Haddows)	
5.	Walkers Shortbread	CNV1
6.	Snippitz Hair/Aviemore Beauty	RS4/RS5
7.	Panchos Takeaway/Restaurant	LS10
8.	La Boheme Restaurant	LS10
9.	The Village Centre Shops	COM 15
10.	Spey Valley Hardware & Household Stores	COM 18
11.	Aviemore News/Post Office/Opticians	Various
12.	Snow Mountain Takeaway	LS8
13.	Scotbet.com	LS4
14.	Ryder Foundation Charity Store	COM 5
15.	Boots the Chemist	COM 6
16.	Skiing Do Restaurant	LS10
17.	Thain Electrical	Com 12
18.	2 retail units under construction	
19.	RBS	FBS10
20.	Police Station	
21.	Papa Rock Pub	LS1
22.	Cairngorm Mountain Sports/Blue Mountain Cafe	COM 30/LS3
23.	Public Toilets	
24.	Subway Takeaway	LS8
25.	Fat Face	COM 20
26.	Julian Graves (Health Foods)	CNV 6
27.	HBOS	FBS10
28.	Tesco Supermarket	CNV 10
29.	Country Crafts	COM 8
30.	Frasers Butchers and Deli	CNV 2
31.	Blacks	COM 30
32.	Bridgemill Direct	COM 20
33.	Smiffy's Fish and Chips	LS8
34.	Ashers Bakery	CNV 1
35.	Semi-Chem	COM 6

36.	Café Bleu coffee shop	LS3
37.	T.I.C	TOU2
38.	The North Face Shop	COM 20
39.	Ellis Brigham Mountain Sports	COM 30
40.	Café Mambo	LS3
41.	Speyside Countrywear	COM 20
42.	Nevisport	COM 30
43.	Waterstones	COM 3
44.	The Coffee Corner	LS3
45.	Cairngorm Hotel	LS9
46.	Roo's Leap Restaurant	LS10
47.	Railway Station	
48.	Highland Property Services	FBS 9
49.	WH Smith	COM 25
50.	Spice of India	LS10
51.	Highland Hospice Charity Shop	COM 5
52.	Esso Garage	
53.	Mountain Sports	COM 30
54.	AHR (food court and retail)	LS9/COM 8
55.	The Apartment (self-catering)	LS9
56.	Royal Tandoori	LS10
57.	Happy Haggis Fish Bar	LS8
58.	Active Aviemore	COM 30

Ballater

Survey date: 16th June 2010 (RG)

Vitality and Viability Performance Indicators:

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer Representation (good range of shops)	Multiple (National) Retailers	2 *no*
	Independent specialist Shops	21 *no*
	Charity/Discount Shops	1 *no*
	Range of Food Shopping (convenience or supermarket)	6 *no* Score: 3
	Range of shops overall	3 – lack of choice of foodstores
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by Retailers (evidence of improvements etc)	Score 3
Space in use for different functions (diversity of uses)	offices (financial and professional services)	6 *no*
	Cafes, tea rooms, pubs, restaurants	9 *no*
	Community/other facilities (specify)	3 (townhall, toilets, TIC)
	Essential Rural services – post office, banks etc (specify)	2 (bank, PO)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental Quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 3
	Car parking provision	Score: 4
Tourism	Range and quality of attractions	Score 2 – no real attractions
	Visitor information, signage	Score 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
• Large numbers of tourists, coach tour parties, little attractions other than retail, art galleries. Number of cafes and tea rooms are large and increasing. • Loirston Hotel currently empty – edge of centre

SWOT Analysis

Strengths	**Opportunities**
• Large Visitor numbers, high number of independent specialist shops, distinct sense of place. • Attractive green spaces	• Distinct town centre environment – sense of place
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail, galleries only, TIC museum • Lack of choice – foodstores	• Lack of tourist info and facilities • Increased car parking pressures, traffic volume • Large numbers of cafes, tea rooms – over dominant • Seasonal visitor pull

Inventory

Bridge Square	**Name**	**Goad Classification**
1.	Outreach Upper Deeside, Support Centre and Charity Shop	COM5 Charity Shop
2.	La Mangiatoia	LS10 Restaurant
3.	Residential	R1
4.	Alexandria Hotel	LS9 Hotel
Bridge Street		
5.	Residential	R1
6.	Byzantum Furnishings	OR1Other Retail
7.	Aberdein Considine	FBS6 Legal Services
8.	HBOS	FBS 10 Bank
9.	HM Sheriden	CNV12 Butcher
10.	Residential – undergoing change of use to cafe	R1
11.	Countrywear Gunsmiths	COM30 Sports, camping etc
12.	Co-operative food	CNV3 Convenience Store
13.	Rowan Jewellery	COM19 Jewellery
14.	Mikahail Pietranek	COM32 Textiles etc
15.	Laurie & Co.	FBS6 Legal Services
16.	Brown Sugar Cafe	LS3 Cafes
17.	Davidson's Chemists	COM6 Chemists
18.	Cybernaut Internet & Computers	COM12 Electrical etc
19.	A.B. Yule Toy shop	COM33 Toys
20.	Deeside Books	COM3 Booksellers
21.	Fraser & Mulligan Solicitors	FBS6 Legal Services
22.	2 STR8 Hairdressers	RS5 Hairdressers
23.	Residential	R1
Victoria Road		
24.	Rowan Antiques & Art	COM1/COM2 Antiques/Art
25.	The Green Restaurant	LS10 Restaurant
26.	Residential	R1

27.	Loirston Hotel - VACANT	LS9 Hotel
Church Square		
28.	Cycle Highlands bike shop	COM9 Cycles
29.	Ballater Public Convenience	N/A
30.	Glenaden Hotel	LS9 Hotel
31.	Prince of Wales Pub - VACANT	LS1 Bars
Golf Road		
32.	New Shanghai Chinese Takeaway	LS8 Takeaway
33.	Chalmers Bakery	CNV1 Bakers
34.	Stagecoach Bus Depot	N/A
35.	G. Strachan Deli	CNV4 Deli
36.	Bean for Coffee cafe	LS3 Cafe
37.	Delicatessen	CNV4 Deli
38.	A. Cassie Hardware	COM18 Hardware
39.	The Bothy Cafe	LS3 Cafe
40.	The Outdoor Store	COM30 Sports, camping etc
41.	DP Opticians	RS6 Opticians
42.	Ballater Flowers	COM13 Florists
43.	A.C. Yule	COM3 Booksellers
Netherley Place		
44.	Balmoral Public House	LS1 Bars
45.	Ballater Post Office	RS10 Post Offices
46.	Daisy's Gifts – Vacant/ Hair Loft	COM17 Cards/RS5
47.	B&B guest House	LS9 Guest houses
48.	Co-operative Foodstore	CNV3 Convenience
49.	No.46 Gallery	Com2 Art
50.	McEwans Clothing	COM20 Clothing
Station Square		
51.	Townhall/Library/CNPA Office	CIV1/CIV2
52.	Old Royal Station T.IC/café/CNPA	TOU1/LS3
53.	Dee Valley Confectionery	CNV1 confectioners
54.	E.J Emslie House Furnishers	COM32 soft furnishings
55.	Bike Station hire and sales	COM9 Cycles
56.	VACANT	
57.	B&B guest House	LS9 Guest houses
58.	McEwans at Home	COM18 Household goods
Viewfield Road		
59.	Fish & Chips Takeaway	LS8 Takeaway
60.	Gift shop - Vacant	

Grantown-On-Spey

Survey date: 17 June 2010 (RG)

Vitality and Viability Performance Indicators:

Indicator	Factor	**Total** (where appropriate quoted also as % overall)
Retailer Representation (good range of shops)	Multiple (National) Retailers	4 *no*
	Independent specialist Shops	23 *no*
	Charity/Discount Shops (specify)	1*no*
	Range of Food Shopping (convenience or supermarket)	4 *no* Score: 3
	Range of shops overall	Score 3 – lack of choice of foodstores
	Vacant premises rate (occupancy levels)	6*no*
	Investment by Retailers evidence of improvements etc)	Score 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	8 *no*
	Cafes, tea rooms, pubs, restaurants	6 *no*
	Community/other facilities (specify)	3 (community hall, British Legion, TIC)
	Essential Rural services – post office, banks etc (specify)	4 (3 banks, PO)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental Quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2 – HGV's
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score 2 – no real attractions
	Visitor information, signage	Score 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
No. of shops, hotels currently empty No. of shops, hotels currently empty

SWOT Analysis

Strengths	Opportunities
• High number of independent specialist shops, distinct sense of place. • Attractive green spaces, built heritage	• Distinct town centre environment – sense of place in square, traditional High St.
Weaknesses	**Threats**
• Lack of alternative tourist attractions – TIC, museum only • Lack of choice – foodstores	• Lack of tourist info and facilities • Increased car parking pressures, traffic volume

Inventory

High Street	Name	Goad Classification
1.	Speyside Knitwear	COM8
2.	Residential – 100 High Street	R1
3.	High Street Car park	N/A
4.	Scissor Trix by Donna	RS5
5.	Ewe & Me Gifts	COM8
6.	Community Centre	N/A
7.	Macleod Building Ltd. (office)	OFF1
8.	VACANT	
9.	Strathspey Hotel - VACANT	
10.	Kiltmaker	COM23
11.	Ewe & me Gifts	COM8
12.	Highland Hospice Charity Shop	COM5
13.	Residential	R1
14.	Church	N/A
15.	Lloyds Pharmacy	COM6
16.	Bliss Hair/Burnett & Co.	RS5/FBS6
17.	Wee Gooseberry.com	COM7
18.	Granton Garage Ltd.	COM34
19.	RBS	FBS10
20.	Ben Mohr Hotel (inc. bar/bistro)	LS9
21.	Lloyds TSB	FBS10
22.	Chinatown Takeaway/Restaurant	LS8/LS10
23.	Ritchie's Gunsmiths	COM30
24.	Ann's Mill Shop	COM8
25.	Victoria Wines - VACANT	
26.	Chaplain's Coffee House	LS3
27.	Imrays Jewellers	COM19
28.	Gratown Dairy (Deli)	CNV4
29.	The Flower Box	COM13
30.	Cockburn's Solicitors	FBS6
31.	Royal Fish Bar	LS8
32.	Wishing Well Gifts	COM8
33.	Audrey's Coffee Shop	LS3
34.	Beale & Pypher – fire damaged	COM10
35.	Post Office	RS10
36.	Mortimer's Fishing Tackle	COM30
37.	HBOS	FBS10
38.	Yo! (childrenswear)	COM7
39.	Grantown News	COM25
40.	Red Ruby Blue - VACANT	

41.	Golden Grantown Chinese	LS8
42.	Animal Ark Supplies	RS7
43.	T.I.C	TOU2
44.	Green Fine Meats	CNV2
45.	Hair @ Mhairi's	RS5
46.	Strathy Offices	OFF1
47.	Beale & Pypher (temporary premises)	COM10
48.	Walkers Shortbread	CNV1
49.	Masson Cairns Solicitors	FBS6
50.	The Bookmark	COM3
51.	The Candy Box	CNV1
52.	Donaldson's Hardware	COM18
53.	Boyd's (Ladies fashion)	COM21
54.	Just Deli…cious (deli)	CNV4
55.	John Ross Funeral Services	FBS7
56.	Grandview House care home	N/A
57.	Claymore Bar	LS1
58.	Iain Moir Butchers - VACANT	
59.	Smarty Art paint Studio	COM8
60.	Scottish Hydro Electrical	COM12
61.	Cooperative	CNV3
62.	Thistle Bar	LS1
63.	Tyree House Hotel - VACANT	
64.	Residential	R1
65.	Residential	R1
66.	Residential	R1
67.	Residential	R1
68.	Guest House	LS9
69.	CNPA Offices	OFF1
70.	CNPA Offices	OFF1
71.	CNPA Offices	OFF1
72.	British Assoc. Snowsports Instructors	OFF1
73.	Residential	R1
74.	Garth Hotel	LS9
75.	Shylet Fish	LS8
76.	Shylet Brasserie	LS1
77.	The Studio Photographers	COM28
78.	SPAR	CNV1
79.	Macleans Bakery/Coffee Shop	CNV1/LS3
80.	Royal British Legion	LS6
81.	Residential – Stonefield House	R1
82.	Residential	R1
83.	Residential	R1
84.	Grant Arms Hotel	LS9
85.	Residential	R1
86.	Residential	R1
87.	Residential	R1
88.	Residential	R1
89.	Highland Council Service Point	FBS7

Kingussie

Survey date: 30 June 2010, RG

Vitality and Viability Performance Indicators:

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer Representation (good range of shops)	Multiple (National) Retailers	2 *no*
	Independent specialist Shops	15*no*
	Charity/Discount Shops (specify)	0
	Range of Food Shopping (convenience or supermarket)	Score: 4 -
	Range of shops overall	Score 4
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by Retailers (evidence of improvements etc)	Score 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	5*no*
	Cafes, tea rooms, pubs, restaurants	10*no*
	Community/other facilities (specify)	0
	Essential Rural services – post office, banks etc (specify)	2 – bank, post office
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores 3
Environmental Quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score 3
	Signs of recent investment/improvements	Score 3
Accessibility	Quality and frequency of public transport	Not known
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score 2 -TIC only
	Visitor information, signage	Score 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Busy through Traffic, lack or services and facilities , good range of hotels, cafes and guest houses

SWOT Analysis

Strengths	Opportunities
• Tourist trade, some offices	• Vacant Sheriff Court building • through traffic issues.
Weaknesses	**Threats**
• High Street Parking • lack of facilities	• HGV volume, tourism dependant

Inventory

High Street	Name	Goad Classification
1.	Highland Council Planning & Building Standards, 100 High St.	Off
2.	Residential	R1
3.	Residential	R1
4.	Residential	R1
5.	Residential	R1
6.	Residential	R1
7.	Bake & Take Cafe	LS3
8.	Residential	R1
9.	Tool Shop	COM18
10.	Residential	R1
11.	Residential	R1
12.	The Tipsy Laird Hotel (bar & restaurant)	LS9
13.	Residential	R1
14.	Robertson & Co. Solicitors & Estate Agents	FBS6
15.	Residential	R1
16.	Be@Home Internet Shop	COM27
17.	Pam's Coffee Shop	LS3
18.	Residential	R1
19.	Residential	R1
20.	McIntosh Gallery/Flying Carpets	COM2/COM32
21.	Sheriff Court - VACANT	
22.	B&B	LS9
23.	Happy Days Takeaway/Breakfast Bar	LS8
24.	Trading Post Hardware	COM18
25.	Gilly's Kitchen Cafe	LS3
26.	VACANT	
27.	Residential	R1
28.	VACANT	
29.	Kingussie Chinese Takeaway	LS8
30.	Residential	R1
31.	Gow's Garage	RS14
32.	Co-op Foodstore	CNV3
33.	Residential	R1
34.	Residential	R1
35.	Something Different (Furnishers)	COM32
36.	Strathy Offices	OFF1
37.	Café Volanto Takeaway	LS8
38.	P. Munro & Co. Accountants	FBS5

39.	Police Station	
40.	Residential	R1
41.	HBOS	FBS10
42.	HBOS	FBS10
43.	Highland Council Offices	OFF1
44.	Allt Gynack Guest House	LS9
45.	Star Hotel (bar & restaurant)	LS9
46.	NK Collection (gifts)	COM8
47.	Post Office	RS10
48.	Service Sports	COM30
49.	Murchie's Grocers of Kingussie	CNV3
50.	Boots Pharamacy	COM6
51.	Country Harvest Florist	COM13
52.	Northern Vacuum Cleaner Services	COM12
53.	Caberfeidh Bookshop/TIC	COM3/TOU2
54.	Caberfeidh Bookshop/TIC	COM3/TOU2
55.	Creativity Gifts	COM8
56.	VACANT	
57.	Riverside Laundrette	RS2
58.	Duke of Gordon Hotel (bar)	LS9
59.	Osprey Hotel	LS9
60.	West End Garage	RS14
61.	Kingussie Primary School	
62.	The Silver Fjord Hotel	LS9
63.	The Paper Shop	COM25
64.	George Gow Butchers	CNV2
65.	King Art Gallery & Frames	COM2
66.	Unisex Salon	RS5

Newtonmore

Survey date: 30 June 2010, RG

Vitality and Viability Performance Indicators:

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer Representation (good range of shops)	Multiple (National) Retailers	1 *no*
	Independent specialist Shops	4*no*
	Charity/Discount Shops (specify)	4*no*
	Range of Food Shopping (convenience or supermarket)	Score: 3 - Convenience
	Range of shops overall	2*no*
	Vacant premises rate (occupancy levels)	3*no*
	Investment by Retailers (evidence of improvements etc)	Score 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	0
	Cafes, tea rooms, pubs, restaurants	6*no*
	Community/other facilities (specify)	1*no*
	Essential Rural services – post office, banks etc (specify)	post office
	Range and diversity of uses overall	Score: 2
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores 3
Environmental Quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	*Score 3*
	Signs of recent investment/improvements	none
Accessibility	Quality and frequency of public transport	Score *3*
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 2 – parking on Main Rd
Tourism	Range and quality of attractions (specify)	Score 2 -TIC only
	Visitor information, signage	Score 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Parking on south side of Main Street – prohibits traffic and leads to amenity issues, high level of tourist accommodation

SWOT Analysis

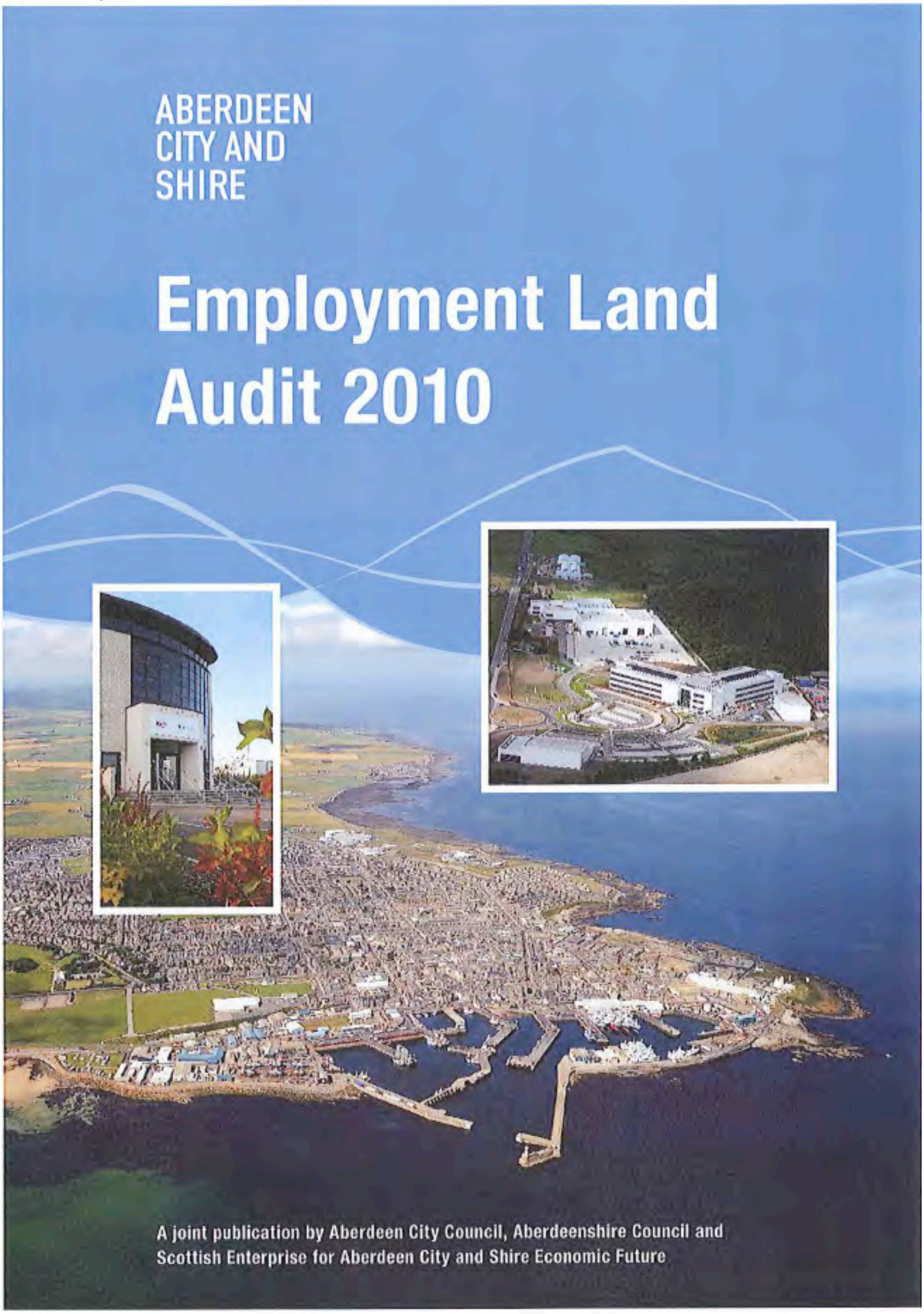
Strengths	Opportunities
• High level of tourist accommodation	• High level of residential in Main Street • diversity of uses
Weaknesses	**Threats**
• Overly strong tourist focus, • no offices, • no services	• Strong focus on tourism, • lack of offices

Inventory

Main Street	Name	Goad Classification
1.	Clan Macpherson House and Museum	Tou1
2.	The Glen Hotel (bar & restaurant)	LS9
3.	Harris Tweed and Highland Shop	COM8
4.	Mains House Care Home	
5.	Residential	R1
6.	Residential (former hotel)	R1
7.	Residential	R1
8.	Newtonmore hostel	LS9
9.	Residential	R1
10.	Residential	R1
11.	VACANT	
12.	Residential	R1
13.	Braeriach Hotel	LS9
14.	Residential	R1
15.	Residential	R1
16.	Residential	R1
17.	Residential	R1
18.	Residential	R1
19.	Residential	R1
20.	Residential	R1
21.	Residential/Mini Mischief (kids clothes)	R1/COM7
22.	Residential	R1
23.	Co-op foodstore	CNV3
24.	Residential	R1
25.	Residential	R1
26.	Residential	R1
27.	Residential	R1
28.	Newtonmore Crafts/Cafe	COM8/LS3
29.	Residential	R1
30.	Residential	R1
31.	VACANT	
32.	Funeral Directors	OFF1
33.	Residential	R1
34.	Pantry Tearooms and Bistro	LS3
35.	Residential	R1
36.	Residential	R1
37.	Residential	R1
38.	Residential	R1
39.	Wildcat Centre	TOU1

40.	Community Hall	
41.	Residential	R1
42.	VACANT	
43.	Toshac's Tea Room	LS3
44.	Residential	R1
45.	Blasta Restaurant	LS10
46.	Blythswood Care Charity Shop	COM5
47.	Residential	R1
48.	Post Office	RS10
49.	Bike Shed	Com9
50.	Main Supply (electrical)	Com11
51.	Newtonmore Primary School	
52.	Strathspey Mountain Hotel	LS9
53.	Residential	R1
54.	Residential	R1
55.	Residential	R1
56.	Balavila Hotel	LS9
57.	Waltzing Waters	TOU1
58.	Maureen Hairdressers	RS5

Appendix 2 - Aberdeen City and Shire employment land audit 2010 (extract)



Employment Land Audit 2010

Published 2010

1. Introduction

1.1 Purpose of Audit

1.1.1 The Aberdeen and Aberdeenshire Employment Land Audit has been prepared to bring together into one source document up-to-date and accurate information on the supply and availability of employment land in the North East of Scotland.

1.1.2 The information has been produced to assist Aberdeen City and Shire Economic Future (ACSEF) in the preparation of economic strategy and policy making and in the implementation of action plans, as well as to alert them to areas where further research and analysis is required (*see section 2.1.2*). The statistics contained within the audit also help the two planning authorities in the monitoring of the policies and proposals included within their structure and local plans.
In addition the information is of interest to companies, developers and other organisations with a requirement for or interest in employment land in the North East of Scotland.

1.1.3 Officials of Aberdeen City and Aberdeenshire Council and Scottish Enterprise together with representatives of the private sector (all members of ACSEF's Employment Land Working Group) have prepared the audit for ACSEF. Reference was also made to relevant information from the private sector. This has helped ensure the provision of a robust and comprehensive source document for employment land supply to assist in delivering the future prosperity of the North East of Scotland. The audit is produced on an annual basis, this being the tenth in the series, the first having been published in October 2001.

2. Background

2.1 Scottish Strategies and Policies

2.1.1 The Government Economic Strategy, published in November 2007, sets out the broad agenda for the Government's focus on Scotland's economy, thus creating:

"A more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth".

Growing the economy is the top priority. A successful economy is seen as the key to future prosperity; ensuring current and future generations enjoy a better quality of life. In order to deliver sustainable economic growth, the Strategy identifies five 'Strategic Priorities' that are internationally recognised to be critical to economic growth. These are identified as:

- Learning, Skills and Well-Being
- Supportive Business Environment
- Infrastructure Development and Place
- Effective Government
- Equity

2.1.2 The Economic Manifesto for Aberdeen City and Shire was published by ACSEF in 2007 and sets out a vision and strategic priorities for the region to work towards by 2025. It identifies eight priorities, the first being for Aberdeen City and Aberdeenshire to be the top of the Quality of Life 'league table', making this a place where people choose to work, live study and visit. The remaining seven are:

- Deliver a fully integrated transport network
- Maximise our intellectual capital - people and expertise
- Deliver city centre redevelopment
- Anchor the oil and gas industry

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- Deliver a fully integrated transport network
- Maximise our intellectual capital - people and expertise
- Deliver city centre redevelopment
- Anchor the oil and gas industry

- Attract and develop skilled people
- Improve the efficiency of planning decision making
- Aberdeen City and Shire as the location of choice for company headquarters

For the penultimate strategic priority, success by 2025 would include having:

'an adequate supply of land maintained for employment and housing purposes' by 2025.

2.1.3 An increase in the supply of marketable employment land has therefore been highlighted as an action point for ACSEF to address and the Audit is used to inform this process.

The Scottish Government published the National Planning Framework 2 (NPF2) on 12 December 2008. The NPF2 aims to guide Scotland's spatial development to 2030 and sets out strategic development priorities to support the Scottish Government's promotion of sustainable economic growth. The Government Economic Strategy makes clear that financial and other resources will be aligned to ensure that policy development and spending programmes are sharply focused on the delivery of that purpose and on achieving the challenging targets the Government is setting. To provide a clear focus for delivery, the Government has set the following strategic objectives:

- Wealthier and Fairer: enable businesses and people to increase their wealth and more people to share fairly in that wealth;
- Greener: improve the natural and built environment and the sustainable use and enjoyment of it;
- Safer and Stronger: help local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life;
- Smarter: expand opportunities to succeed from nurture through to life-long learning, ensuring higher and more widely shared achievements; and
- Healthier: help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care.

This Framework will take forward the spatial aspects of the Government Economic Strategy, to ensure that each part of the country is able to play to its strengths in building a Scotland that is wealthier and fairer, smarter and greener, healthier, safer and stronger. Infrastructure development and place will be key priorities.

2.1.4 Aberdeen and Aberdeenshire are applying their energy sector and offshore strengths to the development of renewable and clean energy technologies. Aberdeen is focusing on strengthening its role as Scotland's northern gateway and broadening its economic base. The City Council is focusing on improving the quality of the environment in the city centre and developing cultural and recreational facilities to create a more vibrant social scene. There is scope for attracting more tourists to the city and expanding the service sector, including financial services. The city's role as a regional media centre provides a base from which to build a larger creative sector.

2.1.5 In Aberdeenshire, the Energetica project envisages attractive development propositions which will impact on residential and commercial sites along the A90 corridor from Bridge of Don to Peterhead.

2.1.6 The Scottish Government's planning policy for economic development is set out in Scottish Planning Policy published in February 2010. This asks Councils to respond to the diverse needs and locational requirements of different sectors and sizes of businesses and take a flexible approach to ensure that changing circumstances can be accommodated and new economic opportunities realised. Removing unnecessary planning barriers to business development and providing scope for expansion and growth is seen as essential. The planning system should also be responsive and sufficiently flexible to accommodate the requirements of inward investment and growing indigenous firms. Planning authorities should ensure that there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking; cycling and public transport, and have a secure planning status. The supply of marketable sites should be regularly reviewed.

The audit provides a useful tool for ACSEF to measure performance against some of the requirements of Scottish Planning Policy and the Structure Plan (*see paragraph 2.2.1*).

2.2 Aberdeen City and Shire Structure Plan

2.2.1 The Aberdeen City and Shire Structure Plan was approved by Scottish Ministers in August 2009. The Plan, which sets out a strategic framework for the management of land in the North East up to 2030, requires the emerging Aberdeen and Aberdeenshire Local Development Plans to identify land for business and industrial uses throughout the plan periods.

2.2.2 Specific amounts are stated for 'strategic growth areas' (*see Appendix 5*), with flexibility for Aberdeenshire Council to determine an appropriate mechanism for 'local growth and diversification' areas. Business and industrial development rates are to be monitored on an annual basis by ACSEF to ensure continuity of land supply. In this respect the audit contributes to the monitoring requirements of the Structure Plan.

2.2.3 The targets under the economic growth objective of the Structure Plan include: to make sure there is at least 60ha of land immediately available to businesses at all times in a range of places within Aberdeen City as well as 60ha in the strategic growth areas within Aberdeenshire.

2.3 Aberdeen City and Aberdeenshire Local Plans

2.3.1 The Aberdeen City and Shire Structure Plan 2009 seeks "to provide opportunities which encourage economic development and create new employment in a range of areas that are both appropriate for and attractive to the needs of different industries..." Local plans for Aberdeen City and Aberdeenshire are required to identify new employment land allocations and identify strategic reserve land to meet this objective.

2.3.2 The Aberdeen City Local Plan was adopted in June 2008. Work is currently underway on the Aberdeen Local Development Plan. The Proposed Plan is due to be published for consultation on 24th September 2010 for a 12 week period.

2.3.3 The Aberdeenshire Local plan was adopted in June 2006. Preparation of the Aberdeenshire Local Development Plan is in progress and a proposed plan was published in July 2010.

2.3.4 The new and existing employment land sites allocated in the adopted Aberdeen City and Aberdeenshire Local Plans have been included in the audit. The audit also includes land not allocated in local plans but which has an existing planning consent and is thus included as part of the established land supply in the 2010 Employment Land Supply tables in *Appendices 2 and 3*. The audit supports the monitoring requirements of the two Local Plans.

2.4 Existing Employment Land Monitoring Arrangements

2.4.1 The Audit is a record of the employment land supply in Aberdeen City and Shire at a given date. It shows the supply of marketable land as defined by SPP. It does not provide information on the range and size of sites nor does it provide detailed information on vacant land within existing, completed sites. It is envisaged that the audit will help provide a useful cross-check with Agents' Reviews and the Scottish Property Network regarding up-to-date information on sites and properties in the area and highlight to ACSEF, areas where further work may be required. In future years, information will be provided on the range of quality and size of sites.

3. Employment Land Audit 2010

3.1 Preparation of Audit

3.1.1 The audit is prepared from information gathered by officials from both Councils, through their monitoring of planning approvals and individual site inspections. The information is kept up-to-date throughout the year and the status of sites checked and agreed with Scottish Enterprise and information published by the private sector, as appropriate. The base date for the published data is 1 April 2010. All figures are given in hectares and are net areas unless otherwise stated.

3.2 Employment Land Supply

3.2.1 Several categories of land supply are identified in the audit. *Appendix 1* provides a list of definitions used for these categories. It is important that definitions are consistent for long-term monitoring and comparative purposes. For this reason definitions are taken from the former SPP2 as these are the only source of definitions at this stage and the adopted standard for use across most Local Authorities. Information on established, constrained, marketable and immediately available employment land supply is given in full in *Appendices 2 and 3*. The information has been divided by area (Aberdeen City and Aberdeenshire - *see Figure 1*) and includes details of site area and location, developer, constraints and servicing status. *Appendix 4* contains information collated at 3 different geographical areas radiating from the city and referred to as zones 1, 2 and 3. *Appendix 5* presents the information for Aberdeenshire by strategic growth areas. *Appendix 6* contains information on historical employment land take-up rates in Aberdeen City and Aberdeenshire.

Figure 1 - Aberdeen City and Aberdeenshire

Based on Ordnance Survey mapping. © Crown copyright reserved. Aberdeenshire Council 0100020767 2010.

3.3 Established Employment Land Supply

3.3.1 The established employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 2*.

Figure 2 - Established Employment Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	217	211	-3.0%
Aberdeenshire	349	351	+0.6%
TOTAL	566	562	-0.7%

3.3.2 In Aberdeen City the level of established land supply still remains high due to the allocation of land at Findlay Farm and Berryhill/Cloverhill at Bridge of Don, Stoneywood and extensions to existing sites at Dyce Drive, and Altens. The amount of established land in Aberdeen City has decreased by 6.5 hectares over the last year primarily as a result of developments currently underway on land at Aberdeen Gateway, Altens East, Science and Energy Park at Bridge of Don and Dyce Drive.

3.3.3 In Aberdeenshire the total area of established land has risen by 2 hectares over the last year. This is the net result of a significant addition (14ha) at Kintore (Midmill), offset by land being developed at sites in Fraserburgh and Inverboyndie as well as sites at Mintlaw and Belhelvie being no longer available for development. Demand for quality land in Aberdeen City and the surrounding towns has decreased over 2009 and is reflected in the low under construction figures. Reassessments of some sites capacities have also affected the total areas.

3.3.4 In addition to the sites included in the Audit there are also three further development sites allocated in the Aberdeenshire Local Plan which could be used for employment uses. The first of these is at the former RAF base at Edzell Woods which comprises 150 hectares of land for redevelopment. The site has been allocated for mixed use within Aberdeenshire Local Plan but has been excluded from the Audit until a development brief has been produced outlining the area which could be used for employment use. Two further employment land allocations have been earmarked in the Aberdeenshire Local Plan for potential development; these are at North Collielaw and St Fergus Gas Terminal. Both sites cover large areas of land, however development must meet Policy Emp\\11: Major Oil and Gas sites and therefore the sites have been excluded from this Audit.

3.4 Constrained Employment Land Supply

3.4.1 Land that is subject to constraints in Aberdeen City and Aberdeenshire is shown in *Figure 3*.

Figure 3 - Constrained Employment Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	103	103	0.0%
Aberdeenshire	134	130	-3.0%
TOTAL	237	233	-1.7%

3.4.2 The amount of constrained land in Aberdeen City remains the same as last year.

3.4.3 The amount of constrained land in Aberdeenshire has decreased by approximately 4 hectares since April 2009. This is mainly as a result of the sites at Mintlaw and Belhelvie being no longer available for development, offset by additions to the constrained supply at Fraserburgh. It is anticipated that infrastructure constraints at large sites at Badentoy and Marywell will be addressed in the near future. If so a further 50ha could become marketable and available for development.

3.4.4 In Aberdeen City some 49% of the established land supply is constrained whilst in Aberdeenshire the figure is 37%. This is perhaps a reflection of greater infrastructure difficulties associated with delivering sites in urbanised areas such as Aberdeen which tend to be larger than those in Aberdeenshire.

3.4.5 It should be noted that land at the Aberdeen Science and Technology and Science and Energy Parks and land at Findlay Farm at Bridge of Don whilst not marketable, due to use restrictions there, is not considered to be constrained and therefore only features as part of the established land supply (*see Glossary* - Marketable Land Supply).

3.5 Marketable Land Supply

3.5.1 The marketable land supply in 2010 is shown in *Figure 4.*

Figure 4 - Marketable Land Supply 2009 and 2010
(net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	91	88	-3.0%
Aberdeenshire	215	212	-1.4%
TOTAL	309	300	-2.9%

3.5.2 Marketable land supply in Aberdeen City has fallen slightly between 2009 and 2010. The net fall in Aberdeenshire is a result of land becoming constrained at a number of small sites in Banff & Buchan, offset by an addition to the supply at Kintore (Midmill).

3.5.3 The supply of land in Aberdeen City and key Aberdeenshire settlements still gives cause for concern in terms of the choice of sites currently available. Reference is made in *section 4* of the Audit to steps being taken by ACSEF to improve the situation. Aberdeen City and Aberdeenshire do currently have an adequate supply of marketable land but choice is limited in some areas. Demand for land in Aberdeenshire tends to be in those settlements concentrated around Aberdeen City such as Westhill, Inverurie and Portlethen and as a result employment land in these areas is taken up quickly while large allocations of land in the North are taken up at a slower rate.

3.6 Immediately Available Land Supply

3.6.1 The immediately available land supply for 2010 is shown in *Figure 5*.

Figure 5 - Immediately Available Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	31	28	-10.0%
Aberdeenshire	42	47	+12.0%
TOTAL	73	75	+2.7%

3.6.2 The supply of immediately available land in Aberdeen City has decreased by 10% (3.3 hectares) largely as a result of developments at Aberdeen Gateway and Altens East.

3.6.3 In Aberdeenshire there has been an increase of similar proportion in the level of immediately available land, due entirely to the addition at Kintore (Midmill).

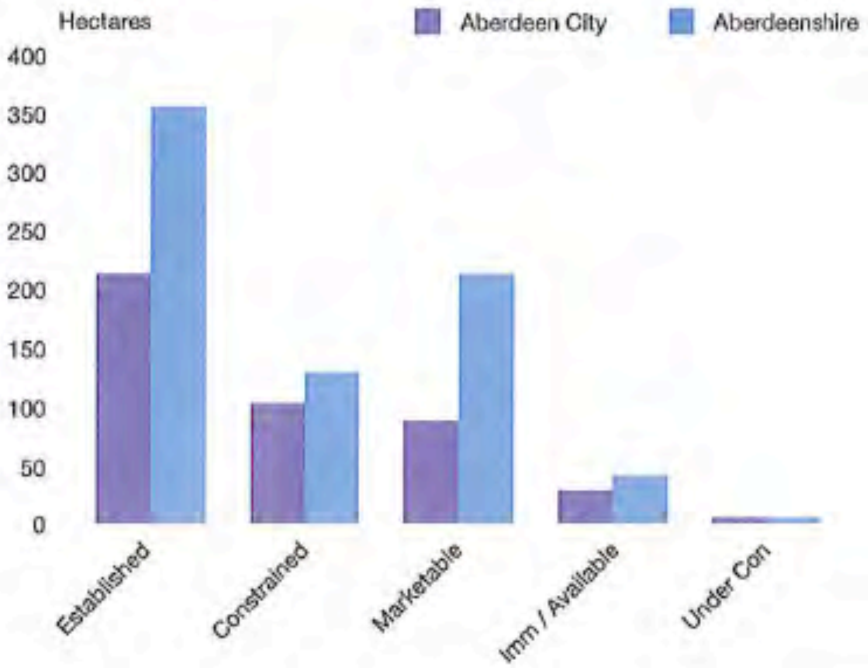
3.6.4 Some 37% of all immediately available land is located within Aberdeen City, reflecting greater demand and therefore a lesser risk attached to speculative land development in and close to Aberdeen.

3.6.5 The immediately available land supply falls short of the Structure Plan targets of 60ha in both Aberdeen City and Aberdeenshire. However, the new Local Development Plans will allocate significant new employment land so the immediately available land supply is expected to reach these targets in subsequent years.

3.6.6 Land under construction is not included in the above categories, as it is neither available nor considered as developed. On completion it will, however, be reflected in the historical development rates for next year's audit. Land under construction is identified in *Appendices 2 and* 3 of the Audit. At the beginning of 2010 there were 3.2 hectares of employment land under construction in Aberdeen. In Aberdeenshire some 3.6 hectares of land were under construction.

3.6.7 *Figure 6* gives a summary of the amount of land in Aberdeen City and Aberdeenshire which falls into each of the supply categories.
NB: The Established Land Supply column represents the total supply of land in the corresponding area.

Figure 6 - Employment Land Supply Summary 2010



Appendix 1: Glossary

Brownfield Sites

Land which has been built on or used in the past for some development purpose. Brownfield land does not include private or public gardens, sports pitches, woodlands or open spaces used for leisure and recreation purposes. The grounds of institutions (such as schools and hospitals) that are no longer used are not considered as brownfield sites.

Constrained Employment Land Supply (Const)

This includes land for example, that has planning difficulties, land subject to ownership difficulties (eg multiple ownership/unwilling sellers), land subject of local plan objections, land with insufficient infrastructure provision, etc. This category therefore includes much of the land in the Established Employment Land Supply that is not Marketable (see below).

Development Rates

These refer to the sum of the net area of employment land that has been developed in a particular year. A site is considered to be developed once the first building has been constructed, even though further building may take place within the same site at a later date.

Employment Land

This includes land for general industrial and business/office use, storage and distribution uses, business parks and specialist technology parks including research and development uses. This comprises Classes 4 (Business), 5 (General Industrial) and 6 (Storage or Distribution) of the 1997 Town and Country Planning (Use Classes) (Scotland) Order, but is not exclusive to these uses.

Established Employment Land Supply (Estab)

This includes all undeveloped land that is allocated for industrial/business/employment use in finalised or adopted Local Plans or has a valid planning approval for these uses.

Greenfield Sites

Sites which have never been previously developed, or are fully restored derelict land.

Gross

This refers to the total area in (hectares) within the boundary of the site.

Immediately Available Land Supply (Imm/Avail)

This is marketable land that currently has planning permission, is serviced and has no other major constraints to immediate development. This definition is useful in the assessment of whether demand for land is being adequately met.

Marketable Land Supply (Market)

This is land that as well as meeting business requirements, has a secure planning status, can be serviced within 5 years, is accessible by walking, cycling and public transport as defined by SPP. It is incumbent on the two planning authorities to ensure that a supply of marketable land is available throughout their areas at any one time, as set down in the Structure Plan. Land that is subject to user restrictions or that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable. Such land is not constrained.

Net

The total area of land excluding roads, landscaping etc. The net area will vary depending on both the physical characteristics of the site and surrounding land uses, as this will determine the area of land suitable for development and the extent and type of landscaping required. For sites that are complete, the net area given is the area that has actually been developed. For sites that have undeveloped land the net area is estimated. This estimate is based on the assumption that on average, 20% of available land will be taken up with roads, landscaping and so on. If relevant site information is available, this is taken into account in the estimate.

Serviced (Ser)

The area of undeveloped land for which servicing tenders have been approved for internal sewers.

Under Construction (UC)

Sites where development has commenced but has not yet been completed.

REF	LOCATION (GRID REF)	DEVELOPER	COMMENTS	SER	ESTAB	CONST	MARKET	IMM/ AVAIL	UC
MARR									
Aboyne									
M/AB/E/004	Aboyne West (3511 7989)	Private		No	3.7	0.0	3.7	0.0	0.0
Alford									
M/AF/E/002b	Alford Business Park (3581 8598)	Kirkwood Homes/ Aberdeenshire Council		Part	2.9	2.0	0.9	0.9	0.0
Ballater									
M/BL/E/002	Tullich Road (3374 7960)	Aberdeenshire Council		Yes	0.4	0.0	0.4	0.4	0.0
Banchory									
M/BN/E/002	Hill of Banchory (3715 7967)	Bancon Devs		Yes	7.0	0.0	7.0	4.5	0.0
M/BN/E/003	Hill of Banchory East (3719 7967)	Bancon Devs		Part	5.4	0.0	5.4	0.0	0.0
Huntly									
M/HT/E/002	Depot Road (3521 8394)	RB Farquhar	Infastructure Restrictions	Part	1.6	0.0	1.6	0.0	0.0
M/HT/E/004a	Muckle Torry Hilock North (3520 8402)	Private/Aberdeenshire Council	Infastructure Restrictions	Yes	2.0	2.0	0.0	0.0	0.0
M/HT/E/005	Mart (3591 8393)	Private	Infastructure Restrictions	No	3.3	0.0	3.3	0.0	0.0
Kincardine O'Neil									
M/KN/E/001	Kincardine O'Neil - Dee Street (3591 7996)	Private		No	0.5	0.0	0.5	0.0	0.0
Lumsden									
M/LD/E/002	Lumsden (3561 8122)	Private		No	0.3	0.0	0.3	0.0	0.0

Appendix 3 – Development Land for Commercial and Industrial Use