



Scottish Marine Technology Park

Economic Impact Assessment

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For Malin Group



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Executive Summary

Purpose

This report is an Economic Impact Assessment of the redevelopment of the Former Carless Oil Terminal site in Old Kilpatrick ('the site'). Investment in the site will enable delivery of the Scottish Marine Technology Park (SMTP, 'the proposed development'). The report is based on the latest iteration of the concept masterplan layout prepared by GD Lodge Architects and the indicative floorspace for the proposed development.

The SMTP offers a new collaborative approach to the marine manufacturing sector whilst regenerating a significant area (17.7 ha) of derelict land on the banks of the River Clyde. By taking advantage of the site's unique suitability for marine-centred activities, including direct access to the deep water channel of the River Clyde, the proposed development will deliver a shared marine facility with capacity for individual bases of operation. The SMTP will complement existing operations on the Upper and Lower Clyde, whilst returning marine manufacturing to this stretch and supporting the recovery of the sector within West Dunbartonshire. It will enable Malin Group, amongst others, to consolidate existing marine fabrication business, and build strength into local economies with commitments around local supply chain development.

The proposed development will bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK, ensuring that it continues to function as a competitive sector on a national and international scale.

Policy Context

The site benefits from strong local policy support and West Dunbartonshire Local Development Plan 2 (August 2020) includes a 'Carless' development strategy and a number of site-specific policies.

The SMTP will contribute to delivery of a number of national initiatives such as the **Programme for Scotland (2020)** which is positioned around the following three commitments that the proposed development will help deliver:



A national mission to create new jobs, good jobs and green jobs: The SMTP will support sustainable economic growth and return marine manufacturing to this stretch of the River Clyde, supporting the recovery of this sector within West Dunbartonshire. It will support a net addition of 1,000 jobs in West Dunbartonshire, 1,130 jobs in the City Region and 1,250 jobs in Scotland (see Table 4-8).



Promoting lifelong health and wellbeing: Employment opportunities created through the proposed development will enable wage growth, helping to reduce regional inequalities and levels of deprivation. The attractive employment opportunities through the proposed development will moreover encourage a rebalance in the population demographics of West Dunbartonshire, namely the working age population (16-64 years).



Promoting equality and helping our young people fulfil their potential: The SMTP will provide skill training opportunities to help reduce regional inequalities whilst ensuring that the employment opportunities provided are aligned with the skills of West Dunbartonshire residents, with cognisance given to the value of the 20-minute neighbourhood (discussed further below). Amenity provision on site also include a nursery facility to help address childcare barriers to the labour market.

It is also well aligned with the **UK Industrial Strategy (2017)**, by delivering against the 5 core themes:



Ideas: the project will bring marine fabrication and leading innovators in the marine industry to West Dunbartonshire providing a hub for collaboration and innovation in marine manufacturing and related industries



People: the SMTP will provide high quality employment opportunities driving wage growth and providing opportunities for upskilling. It will support a net addition of 1,130 jobs to the City Region (see Table 4-8).



Infrastructure: the proposed development will be resource efficient, contributing to low carbon and net-zero targets. Specific elements of the development will contribute directly to the objective for a circular economy and improved infrastructure across the site will improve connectivity and accessibility.



Business environment: the SMTP will deliver 40,000 sqm. of high-quality business space in a landscaped riverside setting across industrial, manufacturing, office, and ancillary uses.



Places: the SMTP will provide a competitive advantage in manufacturing to the local economy. It will support the achievement of a 20-minute neighbourhood, by providing local employment opportunities for the local community, where these are currently limited.

Furthermore, the project is fully aligned with the **Clyde Mission Agenda (2019)**, which is framed around three key messages which the SMTP supports:



Developing a compelling investor prospectus: The proposed development will bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK, ensuring that it continues to function as a competitive sector on a national and international scale.



Identifying further opportunities for business growth and jobs: The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire, primarily at a new manufacturing facility permitted under application (DC19/046). The proposed development will deliver 40,000 sqm. of high-quality employment floorspace, supporting a net addition of 1,130 jobs in the City Region.



Realising the potential of the river to help address the Climate Change Emergency: The site is one of the few sites on the River Clyde, a deep channel water body, with a jetty providing a crucial advantage for industries involved in shipping and marine-centred activities. The SMTP will deliver green technology in support of a net zero vision for Scotland, whilst creating new high value green jobs within the marine manufacturing sector.

It also contributes to Scotland's aspirations for a more circular economy per the Scottish Government's Economic Strategy (2015). By enabling local employment opportunities for residents of Dalmuir and Mountblow, the SMTP will also contribute towards the creation of a 20-minute neighbourhood, an ambition of the Programme for Scotland 2020-2021.

Existing conditions

A review of baseline economic conditions identified several challenges which the proposed development can help to address, namely:

- A decreasing population and a relatively low working age (16-64 years) population compared to the national average;
- A high proportion of deprivation, both in overall rank and across individual domains;
- A high economic activity rate and a high unemployment rate indicative of a high proportion of those looking for work;
- Lower median full time gross annual pay in West Dunbartonshire compared to the wider Glasgow City Region (GCR) and Scotland (see also Table 3-6) ; and
- A high out-commuting profile to Glasgow City and Argyll & Bute.

The challenges identified have been translated into key benefits from the delivery of STMP:

- Reduced levels of out-commuting and creation of an attractive employment location which encourages a rebalance in the population demographics of West Dunbartonshire, namely the working age population (16-64 years);
- Local employment, wage growth and skill training opportunities to help reduce regional inequalities and levels of deprivation, whilst delivering increased GVA outputs.

Economic Impact of SMTP

This economic impact assessment concludes that the SMTP will deliver significant economic benefits across West Dunbartonshire, the City Region, and Scotland as a whole:



**£83.9 million investment
supporting 615 temporary
construction jobs**



**Supporting 750 net
additional marine
manufacturing jobs on
the Clyde**



**Supporting a further 335
net additional jobs in
supporting retail and
office developments**



**Contributing £65.6 million
to the City Region
economy every year**

Net additional at the Glasgow City Region level.

1 Introduction

1.1 Preamble

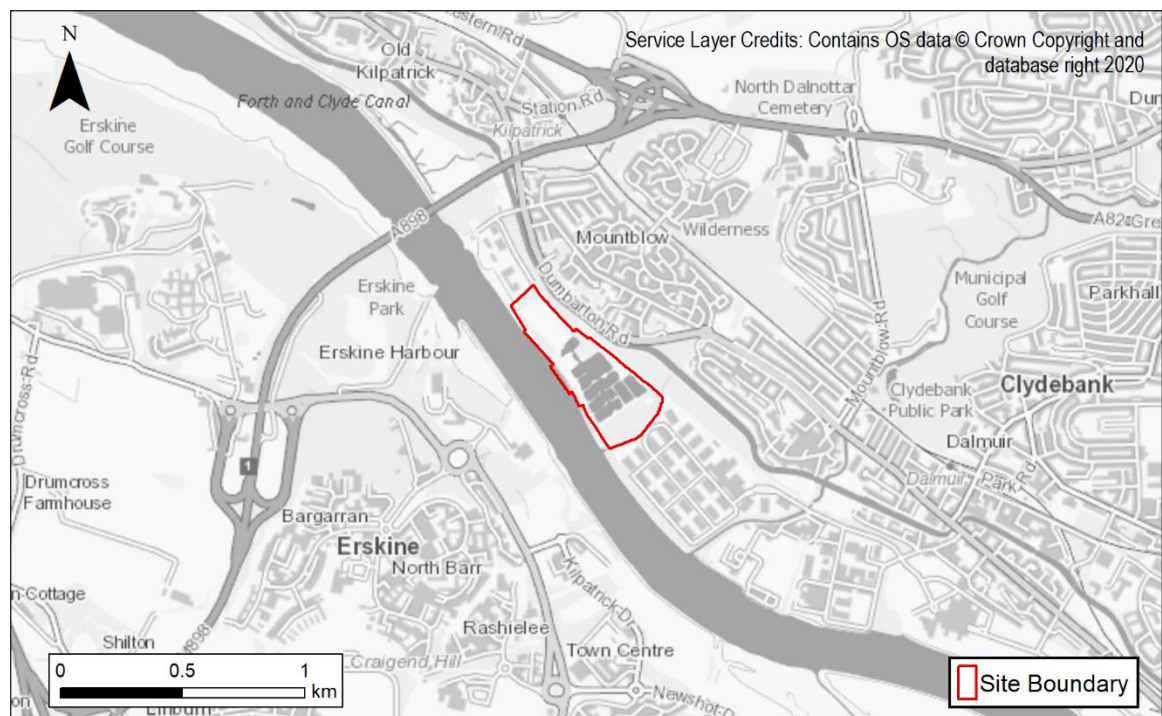
- 1.1.1 Malin Group has commissioned Stantec UK, to produce an Economic Impact Assessment of their proposals for a Scottish Marine Technology Park ('the proposed development'), at the former Carless oil refinery in Old Kilpatrick.
- 1.1.2 The report is an update of an earlier economic impact assessment (2017) and the analysis is based on the latest iteration of the concept masterplan (Figure 1-2); current planning policy (Chapter 2) and baseline conditions (Chapter 3) to inform the Economic Impact Assessment (Chapter 4).

1.2 The Site

Site Location

- 1.2.1 The landholding extends to some 17.7ha, shown in Figure 1-1 below.

Figure 1-1 - Site Location Plan



Source: Stantec, 2020

- 1.2.2 The site occupies a linear belt of land between the River Clyde and the Forth and Clyde Canal, which is characterised by previous industrial use. It is a derelict oil refinery, formerly operated by the petrochemical company Carless. The site has lain derelict since 1992, following closure of the old refinery, decommissioning and surface structure demolition works. It is bounded to the north by the Canal, to the south by the River Clyde and is bisected by the former railway line that designated locally as a Local Nature Conservation Site (LNCS). It is approximately 900m east of the Erskine Bridge which carries the A898, connecting the A82 with the M898 and the A726 (Erskine to Strathaven Road).
- 1.2.3 The site has a single point of access via a private road from Erskine Ferry Road immediately north west of the site, which in turn links to the A814 Dumbarton Road. The private road presently provides access for staff and deliveries to adjacent industrial premises east of the site (including those noted in Table 3-1).
- 1.2.4 The site benefits from long-standing policy support for economic led regeneration and has been identified as a key priority within the WDC Local Development Plan 2 (LDP2) (2020). The site

is one of the few riverside sites with a jetty on the River Clyde, a deep channel water body, providing a crucial advantage for industries involved in shipping and marine-centred activities.

Site History

- 1.2.5 The site was previously used as a Ministry of Defence strategic fuel depot in the first half of the 20th Century and suffered extensive bomb damage during the Second World War. It was then used as an oil storage terminal before being decommissioned in 1992.
- 1.2.6 Decommissioning and surface structure demolition works were then undertaken, although jetties protruding into the River Clyde, partial oil storage structures, areas of reinforced concrete hardstanding and extensive made ground¹ remained on site.
- 1.2.7 In 2017, the site was acquired by Malin Group.

Remediation Works

- 1.2.8 In April 2019, Malin Group received full planning permission (DC18/245) from WDC for remediation of the site, including the extraction and treatment of contaminated soils and groundwater.

Carlless Marine Fabrication Complex (MFC)

- 1.2.9 In August 2019, Malin Group achieved further planning permission, subject to conditions (DC19/0469), for the erection and operation of a marine fabrication complex (MFC). This will be located on the western portion of the landholding and is represented as the purple building (building 18) on Figure 1-2. The MFC will comprise of the following:
 - Fabrication building (3,300 sq.m Class 5 floorspace);
 - Ancillary office accommodation (714 sq.m. Class 4 floorspace);
 - Yard areas for materials delivery, fabrication and storage;
 - A new heavy lift quay providing access to River Clyde (subject to additional marine licence from Marine Scotland);
 - Associated access road and road upgrades from Erskine Ferry Road into the site;
 - Security gatehouse, perimeter fencing and lighting;
 - Staff car parking (provision of 80 spaces);
 - Associated landscaping, including a landscape buffer to River Clyde and the existing Logitech building; and
 - Services, utilities and drainage infrastructure, including a substation.
- 1.2.10 The MFC planning permission application was supported on a non-statutory basis by an application for a marine licence to the Scottish Ministers (Marine Scotland). At the time of this report, MFC are awaiting granting of this licence.

1.3 The Proposed Development

- 1.3.1 The SMTP will see construction and operation of c. 18 buildings shown in an indicative arrangement in Figure 1-2 below. The purple structure is Building 18 permitted as part of the MFC application (DC19/046). Figure 1-2 also includes the accommodation schedule for the proposed development (also reproduced in Table 4-2 below).

¹ Made Ground: Areas where material is known to have been placed on the pre-existing (natural or artificial) land surface (including engineered fill).

Figure 1-2 - The Proposed Development



Source: GD Lodge Architects [2819/01/D December 2019] on behalf of Malin Group Properties Ltd

- 1.3.2 Malin Group currently have their head office in Glasgow and their fabrication business operates from premises at Westway Business Park in Renfrew. Malin Group provide a range of specialist marine engineering services - from fabrication to vessel chartering and marine operations. These services represent substantial contributions to the manufacturing sector across the region and nationally.
- 1.3.3 The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire, primarily at the consented fabrication hall (purple building on the drawing above)(2,970 sq.m NIA supporting 230 jobs) which was permitted under application (DC19/046). The proposed development however offers a total of c.39,950 sq.m (NIA) of employment floorspace, providing opportunity to bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK.
- 1.3.4 Whilst bringing marine manufacturing to this stretch of the River Clyde, the SMTP will also support the recovery of the sector within West Dunbartonshire through commitments around local supply chain development. The collaborative and innovative approach adopted at the SMTP will furthermore ensure that marine manufacturing continues to function as a competitive sector on a national and international scale.
- 1.3.5 The proposed development will regenerate a significant area (c.17.7 ha) of derelict and contaminated land, and support national initiatives such as: the UK Industrial Strategy (November 2017); the Clyde Mission Agenda (2019); and the Scottish Government's Programme for Scotland 2020-2021. The potential for a vessel decommissioning and recycling facility to be located on site will moreover contribute towards ambitions for the UK and Scotland to move towards a more circular economy, in line with aspirations of the Scottish Government's Economic Strategy (March 2015).

1.4 Report Structure

1.4.1 This report is structured as follows:

- **Executive Summary** of policy, baseline and economic effects;
- **Chapter 1 – introduction** and context, including description of development;

- **Chapter 2 – Policy Context**, provides the strategic context for the redevelopment of the site, giving an overview of how the development aligns with national, regional and local planning policies;
- **Chapter 3 – Baseline Conditions**, forms the evidence base for the assessment, including social indicators, labour market conditions, and key business sector information;
- **Chapter 4 – Economic Impact Assessment**, takes account of the latest socio-economic conditions and the current concept masterplan for the SMTP (Table 4-2) to conduct an assessment of its potential economic impact during the construction and operation phases of development.

2 Policy Context

2.1 Introduction

- 2.1.1 This Chapter sets out the key planning policy and other material considerations applicable to the SMTP. It establishes the strategic context of the redevelopment, providing an overview of its alignment with national, regional, and local planning policies.
- 2.1.2 The 2017 version of this economic impact assessment demonstrated that the SMTP would accord with national and regional policy ambitions whilst having support at the local level through the West Dunbartonshire Local Plan (2010) and West Dunbartonshire Infrastructure Investment Plan (2012). However, since then there have been several policy updates including:
- **National:**
 - The UK Industrial Strategy (November 2017);
 - Protecting Scotland, Renewing Scotland: The Government's Programme for Scotland 2020-2021 (September 2020); and
 - Scotland's Economic Action Plan 2019-20, including the Clyde Mission Agenda (September 2019).
 - **Regional:**
 - Glasgow City Region Economic Action Plan (February 2017); and
 - Clydeplan Strategic Development Plan (July 2017).
 - **Local:**
 - WDC's Proposed Local Development Plan 2 (as modified) (August 2020); and
 - WDC's Strategic Plan 2017-2022 (October 2017).
- 2.1.3 These are considered in turn below.

2.2 National Policy

UK Industrial Strategy (November 2017)

- 2.2.1 The UK Industrial Strategy, published by the Department for Business, Energy & Industrial Strategy (BEIS) in November 2017, sets out a long-term plan to boost the productivity and earning power of people throughout the UK. It identifies the UK as moving towards a regenerative circular economy and supports the role that industry can play in regeneration. The strategy supports industrial projects that aim to create better, higher-paying jobs across the UK, building on five foundations of:
- Ideas;
 - People;
 - Infrastructure;
 - Business environment; and
 - Places.
- 2.2.2 Regeneration of the Carless site through the SMTP initiative will help to re-establish part of the River Clyde's industrial heritage by strengthening growth sectors such as manufacturing in West Dunbartonshire. The site will create new employment opportunities in the area, including high-paid, high-skilled jobs associated with marine industries.
- 2.2.3 Investment in and redevelopment of the site delivers against each of the five foundations for a transformed economy that are identified in the UK's Industrial strategy:



Ideas: the project will bring marine fabrication and leading innovators in the marine industry to West Dunbartonshire providing a hub for collaboration and innovation in marine manufacturing and related industries



People: the SMTP will provide high quality employment opportunities driving wage growth and providing opportunities for upskilling. It will support a net addition of 1,130 jobs to the City Region (see Table 4-8).



Infrastructure: the proposed development will be resource efficient, contributing to low carbon and net-zero targets. Specific elements of the development will contribute directly to the objective for a circular economy and improved infrastructure across the site will improve connectivity and accessibility.



Business environment: the SMTP will deliver 40,000 sq.m of high-quality business space in a landscaped riverside setting across industrial, manufacturing, office, and ancillary uses.



Places: the SMTP will provide a competitive advantage in manufacturing to the local economy. It will support the achievement of a 20-minute neighbourhood, by providing local employment opportunities for the local community, where these are currently limited.

National Planning Framework 3 (June 2014)

- 2.2.4 The proposed development aligns with the objectives and principles of national planning policy as set out in Scottish Planning Policy (SPP) (2014) and National Planning Framework 3 (NPF3) (2014). Both express support for sustainable economic growth and regeneration whilst directing development to the most appropriate locations, such as vacant or derelict land. NPF3 identifies regeneration to be a central focus for planning across the Glasgow City Region (Pg.10) – which encompasses West Dunbartonshire and the Clyde Valley. Vacant and derelict land is moreover identified as a continuing challenge in Scotland's environmental agenda (Pg.44).
- 2.2.5 Redevelopment of the Former Carless Oil Refinery will transform 17.7ha of vacant and derelict land, constrained with hydrocarbon contaminants. Remediation of the site by Malin Group through planning permission DC18/245, will address these existing constraints and prepare the site for the development whilst ensuring protection of nearby environmental assets. The delivery of the SMTP will provide employment opportunities, stimulating growth and resilience in the manufacturing sector and wider economy.

National Planning Framework 4

- 2.2.6 The Scottish Government is currently preparing National Planning Framework 4 (NPF4) which will guide spatial development, set out national policies, designate national developments and reflect regional spatial priorities for Scotland up to 2050. NPF4 is proposed to incorporate SPP and will take on an enhanced status as part of the Statutory Development Plan.
- 2.2.7 A Call for Ideas on NPF4 was launched in January 2020, concluding in March 2020. An Interim Position Statement is due to be published alongside the Draft NPF4 in 2021. NPF3 (2014) remains in place until it is replaced by an adopted NPF4, anticipated for 2021.
- 2.2.8 In tandem with the NPF4, the Scottish Government have published the Clyde Mission Agenda (2019) as discussed in Section 2.2.15 below. NPF4 will set out the planning implications of the Agenda (2019), and once adopted drive regional and local planning policy applicable to the site. It is unlikely that the proposed development will contradict the plans and strategies of the NPF4 upon adoption. NPF3 identifies vacant and derelict land as a continuing challenge in Scotland's environmental agenda and it is therefore anticipated that addressing such land will continue to be a prominent theme within NPF4.

Scottish Government's Economic Strategy (March 2015)

- 2.2.9 The main driver for policy development within the Scottish context is to achieve inclusive growth as detailed in the Scottish Government's Economic Strategy (2015). Inclusive growth is growth which combines increased prosperity with greater equality, creates opportunities for all, and distributes the benefits of increased prosperity fairly.
- 2.2.10 The strategy sets out a framework for a competitive and fairer Scotland whilst highlighting the need to take advantage of national strengths in manufacturing to re-balance and re-industrialise the economy (Pg.26). It also seeks to create conditions for a more circular economy, transforming used products into assets to support industries (Pg. 46).
- 2.2.11 The manufacturing focus of the SMTP is consistent with the ambitions of the strategy, identifying the manufacturing sector as contributing to wider equality objectives by addressing regional imbalances and creating increased employment opportunities for skilled workers (Pg.27). The proposed development will also deliver opportunities for collaboration between leading innovators in the marine industry and marine manufacturers in the UK. This includes a dedicated research and development facility for university of Strathclyde (1,938 sq.m NIA) and a recycling facility (8,352 sq.m NIA) and two boat repair facilities (2,025 sq.m NIA each) directly contributing towards circular economy ambitions.
- 2.2.12 The manufacturing jobs and supply chain linkages created through the proposed development outcomes that are acknowledged within the Strategy (2015) as key contributions to reducing regional inequality and promoting prosperity. The SMTP will support regional growth, help address employment and wage imbalances that might exist, and help to establish high value supply chain linkages.

Manufacturing Action Plan (February 2016)

- 2.2.13 The importance of manufacturing to Scotland is reiterated in the Manufacturing Action Plan: A Manufacturing Future for Scotland (2016). Manufacturing jobs and supply chain linkages are identified as key contributing factors in reducing regional inequality and promoting prosperity (Pg.1). The Plan seeks to create momentum behind national ambitions for more industry-led innovation. Malin Group have a long-established history of innovation with the company tracing its roots back to the mid-18th century with involvement in shipping and ship delivery on the River Clyde in Glasgow. The Group has since grown and diversified, developing a number of additional and specialist companies enabling it to become one of the most comprehensive providers of end to end marine solutions in the world.

Economic Action Plan (September 2019)

- 2.2.14 The Scottish Government published a refreshed Scotland Economic Action Plan 2019-20 (2019) which establishes how Scotland will tackle a number of challenges including: the climate emergency; Brexit; changing demographics; and shifting global circumstances such as the impacts of COVID-19. It is positioned around the 3R's of Resilience; Recovery; and Restructuring, seeking to grow an inclusive economy. Investment and redevelopment of the site reflects the 3R's:
- **Resilience:** The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire, primarily at the already consented fabrication building which was permitted under application DC19/046. The proposed development offers a total of c.39,950 sq.m (NIA) of employment floorspace, providing opportunity to bring together leading innovators in the marine industry to collaborate and further the growth of marine manufacturing in the UK. By attracting a number of marine enterprises to one location, they can support each other and expand the number of the marine sectors serviced, taking the offering beyond shipbuilding or renewables, and into the additional sectors of aquaculture, marine technology and vessel equipment. The collaborative nature of SMTP will help to stimulate new ways of working, new manufacturing techniques, and allow new start up businesses to access and find new markets. The SMTP will ensure that the sector continues to function and grow competitively on a national and international scale.
 - **Recovery:** Productivity is the principal long-term driver of economic growth. The proposed development will directly contribute to growth by increasing productivity through the creation of high-quality employment and wage growth opportunities, stimulating increased levels of GVA per worker.

- **Restructuring:** The proposed development will return marine manufacturing to this stretch of the River Clyde, supporting the recovery of this sector within West Dunbartonshire. The innovative nature of the business premises on site will moreover support the restructuring of a manufacturing sector, ensuring that it continues to function as a competitive sector on a national and international scale.

Clyde Mission Agenda (2019)

- 2.2.15 The “*Importance of every place in Scotland*” section of the Scotland Economic Action Plan (2019) commits the Scottish Government to developing a long-term vision and plan for the revitalisation of the River Clyde. This proposed plan is not yet available, however the Scottish Government have published the Clyde Mission Agenda (2019) which includes ambitions to bring new economic life and vibrancy to the Clyde corridor. This in turn will benefit the Glasgow City Region and Scotland. The initial focus of the Agenda (2019) is to realise the potential opportunities the River Clyde presents for new industries and jobs.
- 2.2.16 As noted in section 2.2.6 once adopted, NPF4 will set out the planning implications of the Clyde Mission Agenda (2019).
- 2.2.17 The Clyde Mission Agenda (2019) is framed around three key messages which the SMTP supports:



Developing a compelling investor prospectus: The proposed development will bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK, ensuring that it continues to function as a competitive sector on a national and international scale.



Identifying further opportunities for business growth and jobs: The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire, primarily at their new manufacturing facility which was permitted under application DC19/046. The proposed development will deliver 40,000 sqm. of high-quality employment floorspace, supporting a net addition of 1,130 jobs in the City Region.



Realising the potential of the river to help address the Climate Change Emergency: The site is one of the few sites on the River Clyde, a deep channel water body, with a jetty providing a crucial advantage for industries involved in shipping and marine-centred activities. The SMTP will deliver green technology in support of a net zero vision for Scotland, whilst creating new high value green jobs within the marine manufacturing sector.

- 2.2.18 The proposed development, in accordance with the Clyde Mission Agenda, will build resilience in the economy and manufacturing sector. The SMTP will create new employment, wage growth and upskilling opportunities, reducing regional inequality and promoting prosperity. The proposed development will re-introduce marine manufacturing to the River Clyde, a key aspects to its industrial heritage and heritage of the wider Glasgow City Region (GCR).

Programme for Scotland (September 2020)

- 2.2.19 The Scottish Government has recently published Protecting Scotland, Renewing Scotland: The Government's Programme for Scotland 2020-2021 (2020). The Programme sets out actions the Government will take over the coming year and beyond. Published within the context of the ongoing COVID-19 pandemic, it acknowledges the virus as the “*the single greatest public health crisis of our lifetimes*” (Pg. 2). The Programme therefore seeks to address the economic, health, and social crisis that the pandemic has brought whilst taking the opportunity to rebuild Scotland as a fairer and stronger nation.
- 2.2.20 The Programme for Scotland (2020) is positioned around the following three commitments which the proposed development aligns with:



A national mission to create new jobs, good jobs and green jobs: The STMP will support sustainable economic growth and return marine manufacturing to this stretch of the River Clyde, supporting the recovery of this sector within West Dunbartonshire. It will support a net addition of 1,000 jobs in West Dunbartonshire, 1,130 jobs in the City Region and 1,250 jobs in Scotland (see Table 4-8).



Promoting lifelong health and wellbeing: Employment opportunities created through the proposed development will enable wage growth, helping to reduce regional inequalities and levels of deprivation. The attractive employment opportunities through the proposed development will moreover encourage a rebalance in the population demographics of West Dunbartonshire, namely the working age population (16-64 years).



Promoting equality and helping our young people fulfil their potential: The SMTP will provide skill training opportunities to help reduce regional inequalities whilst ensuring that the employment opportunities provided are aligned with the skills of West Dunbartonshire residents, with cognisance given to the value of the 20-minute neighbourhood (discussed further below). Amenity provision on site also include a nursery facility to help address childcare barriers to the labour market.

- 2.2.21 A key element to rebuilding is the idea of 20-minute neighbourhoods – the creation of liveable, accessible places, with thriving local economies, where people can meet their daily needs within a 20-minute walk – positioned within the ‘promoting equality and helping our young people fulfil their potential’ commitment. The neighbourhoods are proposed as a way to build strength into local economies with new commitments around local supply chain development. They will enable people to live better, healthier lives whilst supporting national net zero ambitions. In recognition of this, the report has identified Baseline Conditions (**Chapter 3**) utilising a 20-minute neighbourhood (Figure 3-1), with data extracted from CoStar.
- 2.2.22 The Programme also highlights governmental ambitions to develop a Blue Economy Action Plan, to harness and bolster Scotland’s international profile as a successful, modern and innovative maritime nation (Pg. 53). Although this Plan is not yet available (as of September 2020), the SMTP will bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK. The SMTP will enable Malin Group and others, to locate their marine business in West Dunbartonshire, thereby growing the local marine manufacturing sector. The proposed development is likely to contribute directly to the overall ambitions of the Blue Economy Action Plan.

2.3 Regional Policy

Clydeplan (July 2017)

- 2.3.1 The Clydeplan Strategic Development Plan (SDP) identifies the site as forming part of the Clydebank Riverside Strategic Employment and Industrial Location (SEIL). Policy 5: SEILs requires local authorities to “*safeguard and promote investment in the SEILs to support their dominant role and function and to address the opportunities/challenges*” (Pg.37). More broadly the SDP defines a Clyde Development Corridor along the River Clyde where the re-use of vacant/derelict land and “*large-scale economic activity*” is to be prioritised (Pg.24). The site will directly contribute towards the SDP through redevelopment of c.17.7ha of vacant and derelict land alongside the River Clyde.
- 2.3.2 The SDP (2017) moreover directs development to sustainable brownfield locations and promotes maximising the use of existing infrastructure and assets (Pg.8). The SMTP will take advantage of the site’s unique suitability for marine-centred activities including direct access to the deep water channel of the River Clyde, via a reconstructed and improved jetty.

Glasgow City Region Economic Action Plan (February 2017)

- 2.3.3 The Glasgow City Region (GCR) Economic Action Plan (2017) sets out the ambitions for the region, with an emphasis on building a strong, inclusive, competitive and outward-looking economy, sustaining growth and prosperity with every person and business reaching their full potential. The Plan seeks to address long standing barriers in the labour market such as skills. The employment opportunities available at the proposed development will be suited to the existing labour market conditions (section 3.4) as well as offering high-skilled employment and opportunities for upskilling. The nursery to be provided on site will also help to address childcare barriers to the labour market.
- 2.3.4 The Glasgow City Region City Deal is identified within the Plan as a catalyst for the wider economic development and regeneration in the City Region. The proposed development will contribute to this wider ambition through reinvigorating marine engineering services along the River Clyde and establishing a diverse range of employment opportunities for City Region residents.

2.4 Local Policy

West Dunbartonshire Local Development Plan 2 (August 2020)

- 2.4.1 On the 19th August 2020, the WDC Planning Committee agreed to adopt a new Local Development Plan 2 (LDP2). The Council are currently awaiting confirmation from the Scottish Government to allow formal adoption of the Proposed Plan (2020).
- 2.4.2 The proposed development delivers a number of elements that directly contribute to key themes presented within LDP2 including:
- **Business:** The proposed development will support a variety of business on site with the accommodation schedule detailed in Table 4-2. A key focus of the site will be the 32,000 sq.m NIA of manufacturing floorspace delivered, of which 9.2% (2,970 sq.m NIA) will be occupied by Malin Group's marine fabrication business (DC19/046), with the wider employment floorspace supporting innovation in the marine industry as well as a number of other services including: Offices (1,938 sq.m NIA); Café (404 sq.m NIA); ancillary services (1,197 sq.m NIA); and Nursery (278 sq.m NIA).
 - **Place:** LDP2 aims to create places for people, spaces for investment and destinations to enjoy. The SMTP will enable this through the mix of uses identified above and in Table 4-2. The development will become a single location for employment, local services and community assets aimed at supporting employees onsite as well as the surrounding community. Pedestrian, cycle and vehicle access to the site will be available from Erskine Ferry Road. The SMTP will incorporate connectivity to the existing blue and green network and the Forth and Clyde Canal designed at improving active travel linkages to and from the site.
 - **Environment:** The proposed development benefits from the existing approved planning application (DC18/245) for remediation of the site, ensuring the effective extraction and treatment of contaminants. This will help address some of the existing environmental constraints and ensure surrounding environmentally sensitive areas, such as the Inner Clyde SPA, SSSI and Ramsar areas, are improved. Malin Group's approved plans (DC19/046) and their intentions for the development of the remainder of the SMTP include wider green network enhancements, including landscaping improvements across the boundaries of the site and enhanced levels of visual screening along the River Clyde.

Site Development Strategy

- 2.4.3 LDP2 notes the Clydebank Riverside Strategic Economic Investment Location which encompasses the site and identifies it as a key regeneration site in the 'Delivering our Places' section of the Plan (Pg.15).
- 2.4.4 The Development Strategy for Carless is detailed as follows:
- *"To remediate the Carless site to enable redevelopment for business and industrial uses, appropriate commercial uses and, where appropriate and justified, housing and day-to-day convenience retail uses;*

- *To provide a secondary access point to the site where residential development is proposed on site H2(33) Carless and to upgrade the existing access to serve the business and industrial and mixed-use areas of the site;*
- *To use development of the site to enhance the Green Network;*
- *To protect the Forth and Clyde Canal and its setting; and*
- *To ensure no adverse effect on the integrity of the Special Protection Area (SPA) or on the objectives of designation and the overall integrity of the Site of Special Scientific Interest (SSSI)” (Pg.27).*

Site Specific Policies

2.4.5 This Development Strategy is formed around four site specific policies (Carless policies 1 – 4). The following are of relevance to the proposed development:

- **Carless Policy 1:** provides support for development proposals comprising of Class 4, 5 and 6 (business or industrial use) on the areas identified for these uses within the WDC Development Strategy Map;
- **Carless Policy 2:** provides support for the site to primarily comprise of Class 4, 5 or 6 business and industrial development. Commercial uses are restricted to uses such as a hotel and commercial leisure, which are to be ancillary and compatible with the business and industrial uses identified; and
- **Carless Policy 4:** requires development on the site to deliver “*habitat, access, green and open space enhancements on site*”.

2.4.6 Carless Policy 3 sets out requirements regarding residential development proposals however this is not applicable to the current proposals for redevelopment of the site.

2.4.7 LDP2 also contains the following policies of relevance:

- **Policy WD1 Waterfront Development:** Policy WD1 requires development proposals adjacent to waterfront assets, including the River Clyde, to contribute to a range of objectives, including the delivery of an enhanced waterfront frontage, and protected or enhanced access to that waterfront. Development proposals are expected to demonstrate appropriate design, massing and scale of built form whilst ensuring delivery of a coordinated approach to development; and
- **Policy FCC1 Forth & Clyde Canal:** Development proposals adjacent to the Forth and Clyde Canal are expected to enhance this asset.

West Dunbartonshire Strategic Plan (October 2017)

2.4.8 The West Dunbartonshire Strategic Plan details the key commitments of the Council for the period 2017-22. It identifies a number of strategic priorities held by the Council to better the lives of West Dunbartonshire residents. This includes a strong local economy and improved job opportunities (Pg.10). The long-term investment by Malin Group at the site will enable local regeneration improving opportunities for residents through employment creation. On-site amenities delivered at the SMTP (as detailed in Table 4-2) support sustainable ways of working and create an attractive employment opportunity, to support a reduction in levels of out-commuting and rebalancing of the population demographics of West Dunbartonshire

2.5 Summary

- 2.5.1 The proposed development will regenerate a significant area (17.7ha) of derelict land on the banks of the River Clyde, an area with a long-established history in marine manufacturing. This regeneration is a direct contribution towards Scotland’s environmental agenda which identifies vacant and derelict land as a continuing challenge.
- 2.5.2 The site has strong local policy support with WDC having developed a Carless development strategy and a number of site-specific policies (LDP2, 2020), which the SMTP will achieve. It is also aligned with regional ambitions for regeneration along the River Clyde corridor.
- 2.5.3 The SMTP development will contribute to a number of national initiatives such as the UK Industrial Strategy, the Clyde Mission Agenda, the Scottish Government’s Programme for Scotland 2020-2021 and aspirations for a more circular economy per the Scottish Government’s

- Economic Strategy. The site will moreover contribute to the achievement of 20-minute neighbourhoods, detailed within Programme for Scotland, by enabling local employment and local supply chain development and supporting national net zero ambitions.
- 2.5.4 Employment opportunities created on site will support sustainable economic growth, strengthen key growth sectors, such as manufacturing, and address key social issues including regional imbalances. It will contribute to the removal of long-standing barriers in the labour market whilst reducing wider barriers such as the access to childcare services.
- 2.5.5 The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire, primarily at Building 18 (2,970 sq.m NIA) which was permitted under application (DC19/046). The overall development however offers a total of 39,950 sq.m (NIA) of employment floorspace, providing opportunity to bring together leading innovators in the marine industry to collaborate and further marine manufacturing in the UK.

3 Baseline Conditions

3.1 Introduction

3.1.1 This Chapter presents a current and prospective overview of relevant socio-economic baseline conditions. Since May 2017 when the previous iteration of this report was produced, new datasets have been released that are reflective of recent population, economic activity, income, deprivation, and housing positions.

3.1.2 Baseline conditions considered within this Chapter consist of the following:

- **Social Indicators:** population and the Scottish Index of Multiple Deprivation (SIMD);
- **Labour Market:** economic activity and travel to work data; and
- **Key Business Sectors:** construction and manufacturing.

Study Areas

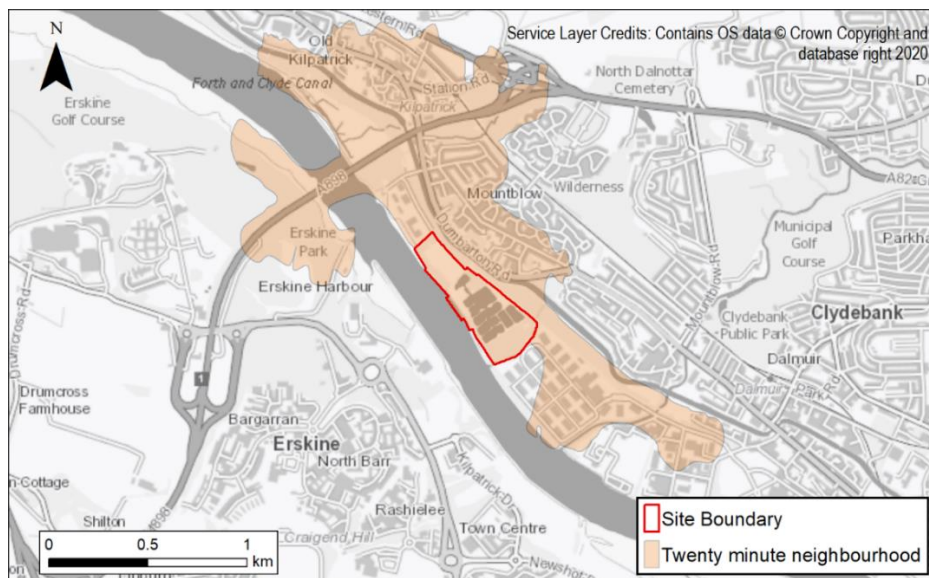
3.1.3 The Study Areas of West Dunbartonshire, Glasgow City Region (GCR)², and Scotland have been retained from the previous iteration of this assessment.

3.1.4 Where available, this Chapter presents further socio-economic conditions within a 20-minute walk from the site (Figure 3-1). This additional Study Area reflects Scottish Government priorities for businesses to be resource efficient and low carbon (Scottish Government's Economic Strategy, 2015) i.e. accessing employment locally to reduce carbon emissions; and the idea of 20-minute neighbourhoods, as presented within Protecting Scotland, Renewing Scotland: The Government's Programme for Scotland 2020-2021.

3.2 Twenty Minute Neighbourhood

3.2.1 Figure 3-1 below presents the twenty-minute neighbourhood around the site, defined by walking times.

Figure 3-1 - Twenty minute neighbourhood



Source: Stantec, 2020

² Glasgow City Region comprising the local authority areas of: West Dunbartonshire; East Dunbartonshire; East Renfrewshire; Renfrewshire; North Lanarkshire; South Lanarkshire; Inverclyde; and Glasgow City. This study area was reported as the Clyde Valley in the May 2017 version of this assessment.

- 3.2.2 The neighbourhood is populated by a number of suburban residential areas including Old Kilpatrick and Mountblow. 2011 Census based population projection data estimates a population of 2,889 within the 20-minute Study Area, of which 1,908 (66.0%) are working age (16-64 years).
- 3.2.3 The Forth and Clyde Canal separates the residential areas from the SMTP and beyond that, the north bank of the River Clyde.
- 3.2.4 The 20-min neighbourhood captures 15 businesses as detailed in Table 3-1.

Table 3-1 – Businesses in the twenty minute neighbourhood

Ref	Business	Overview
North of the site		
1	Logitech Limited	A materials processing company that design and manufacture of precision equipment. The Old Kilpatrick site is the company's headquarters.
2	Subsea 7	An engineering, construction and services company serving the offshore energy industry. The Old Kilpatrick site is a pipeline welding development centre.
3	Swagelining Limited	A company specialising in the development and delivery of bespoke polymer lining solutions for onshore and subsea applications through an Integrated Lining System. The Old Kilpatrick site is the company's headquarters.
4	Erskine Ferry Road Recycling Centre	A household waste recycling facility operated by WDC.
East of the site		
5	Dalmuir Whisky Bond	A whisky bond comprising 29 separate storage buildings for Chivas Brothers Ltd.
6	Scottish Water - Dalmuir Waste Water Treatment Works (WWTW)	A primary waste water treatment works operated by Saur UK on behalf of Scottish Water. The plant lant serves over 650,000 people living throughout North West Glasgow, East Dunbartonshire and parts of North Lanarkshire. ³ .
7	Baird Lends a Hand	A managed storage and containerised storage facility.
8	Tekbo	Tekbo manufacture and build a comprehensive range of rigid dry-freight and refrigerated bodywork. The Old Kilpatrick site is their headquarters.
9	NCCE Switchgear	Provide bespoke electrical power solutions for industrial land-based systems, including naval and marine applications. The Old Kilpatrick site is the company's headquarters.
10	Williams Window Fabrication	A window fabrication specialist for both residential and commercial needs. The Old Kilpatrick site is their headquarters.

³ Source: Saur UK, 2020, Glasgow contract. Available at: <https://www.saur-uk.com/operations/glasgow-contract/>

Ref	Business	Overview
11	Clyde Associated Engineers	Suppliers of pump and mixing equipment for industrial needs across the UK and Ireland. The Old Kilpatrick site is their headquarters.
12	KVC UK - Clydebank	A mechanical engineering company specialised in the design and manufacture of ball valves for the oil, gas, chemical, petrochemical, pipeline and water industries. The Old Kilpatrick site is the company's headquarters.
13	Terasaki Electric (Europe)	An electronics manufacturer specialising in circuit protection, control and system products for electrical energy distribution for industrial, marine and commercial projects. The Old Kilpatrick site is the company's headquarters.
14	European Circuits	An electronics manufacturer specialising in the design, production and build of printed circuit boards. The Old Kilpatrick site is the company's headquarters.
North east of the site		
15	Crisis Counselling	Counselling facilities operated from Old Ferry Road, Erskine.

Source: Stantec, 2020

- 3.2.5 The businesses identified within the Study Area indicate an established reputation for innovation, manufacturing, technology and recycling. The SMTP is reflective of the surrounding business environment, adding to and enhancing the existing offering.

3.3 Social Indicators

Population

Demographics

- 3.3.1 In 2019, West Dunbartonshire had an estimated population of 88,900, of which 56,600 (63.7%) are working age (16-64 years). This cohort is however comparatively smaller than for the GCR (65.6%) and Scotland (64.0%) as presented in Table 3-2 below.

Table 3-2 – Population estimate and age structure (2019)

	West Dunbartonshire	Glasgow City Region	Scotland
Total	88,900	1,844,900	5,463,300
Aged 0 - 15	17.5%	17.2%	16.9%
Aged 16 - 64	63.7%	65.6%	64.0%
Aged 65 and over	18.8%	17.2%	19.1%

Source: ONS mid-year Population estimates (2019)

- 3.3.2 The lower proportion of working age (16-64 years) population is indicative of the depopulation experienced by West Dunbartonshire in recent decades. Between 1998 and 2019, the population of West Dunbartonshire has decreased by 6.3%. Over the same time period, Scotland's population rose by 7.6%.
- 3.3.3 West Dunbartonshire's working age population decreased by 6.2% from 1998 to 2019⁴. The 25 to 44 age group saw the largest percentage decrease (-23.3%) and the 45 to 64 age group saw the largest percentage increase (+20.9%) indicative of an ageing workforce.

⁴ Source: ONS, Percentage change in population by age group, West Dunbartonshire, 1998 and 2019.

- 3.3.4 West Dunbartonshire's population structure over the past five years (2014-2019) indicates a decline in the 0 to 15 age group (-0.6%) and the 16 to 64 (-2.9%) working ages population. This decreased population within the younger age groups may indicate potential difficulties in attracting potential employees to live locally, such as within the 20-minute Study Area. Conversely, the 65+ age group has seen an increase of 6.4% indicative of an ageing population.

Population Projections

- 3.3.5 2018-based population projections (Table 3-3) indicate this population decrease is set to continue within West Dunbartonshire, ahead of that for the GCR and Scotland. By 2043, West Dunbartonshire's population is projected to have decreases by 5.3% compared to a 0.5% reduction for the GCR and 0.7% for Scotland.

Table 3-3 – 2018-Based Population Projections

	West Dunbartonshire	Glasgow Region	City	Scotland
2018	89,130	3,575,350		5,438,100
2028	87,141	3,633,483		5,537,116
% Change	-2.2%	1.6%		1.8%
2043	82,537	3,651,204		5,574,819
% Change	-5.3%	0.5%		0.7%

Source: ONS, Projected total population by Scottish area (2018-based), 2018 to 2043

- 3.3.6 Consolidating Malin Group's marine manufacturing assets in West Dunbartonshire and opening the SMTP to complementary businesses is likely to help slow the depopulation by creating attractive employment opportunities and reasons to live, work and stay locally.

Scottish Index of Multiple Deprivation

- 3.3.7 The Scottish Index of Multiple Deprivation (SIMD) is the Scottish Government's official tool for identifying concentrations of deprivation in Scotland. The SIMD looks at the extent to which an area is deprived across seven domains: income, employment, education, health, access to services, crime and housing. It ranks data zones from the most deprived (ranked 1) to least deprived (ranked 6,976)⁵.

SIMD 2020 is the Scottish Government's sixth edition since 2004 and the latest publication. Of the 121 data zones within West Dunbartonshire, 40% of the data zones (count: 48) are identified to be within the top 20% most deprived with regards to their overall rank. 17% (21 data zones) are identified to be within the top 10% most deprived with regards to their overall rank. Across the seven domains West Dunbartonshire is ranked as follows (

⁵ SIMD provides a measure of relative deprivation at data zone level, indicating whether one data zone is relatively more deprived than another however it does not detail how much more deprived a data zone may be.

3.3.8 Table 3-4 and Figure 3-2):

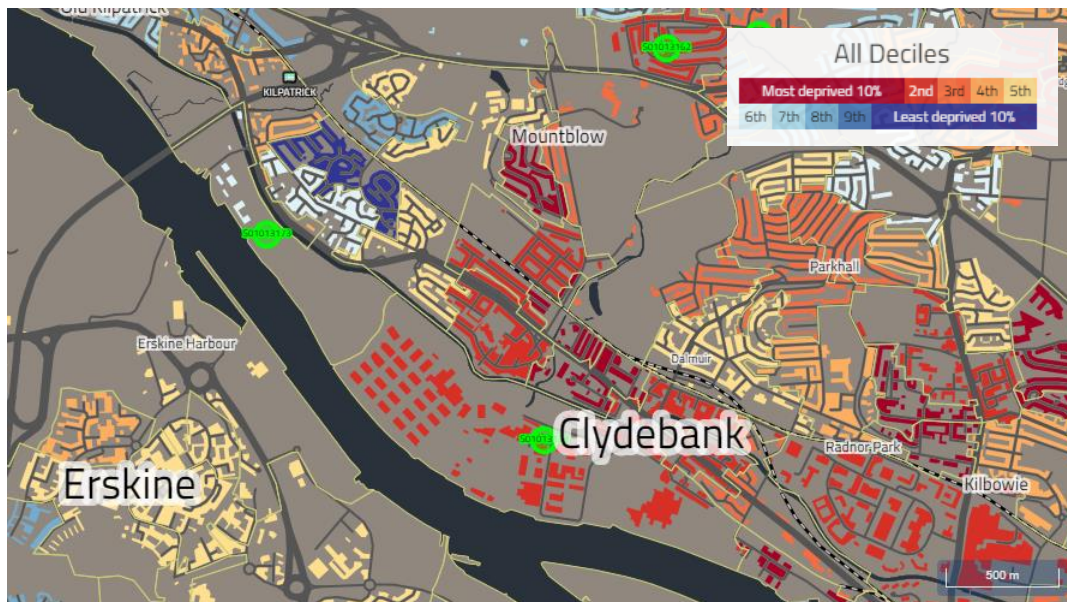
Table 3-4 – Scottish Index of Multiple Deprivation (2020) (also see Figure 3.2)

Domain	Top 20% most deprived		Top 10% most deprived	
	%	Count	%	Count
Income	37%	45	21%	25
Employment	40%	48	17%	21
Education	28%	34	13%	16
Health	36%	43	17%	20
Access to Services	23%	28	3%	4
Crime	21%	25	11%	13
Housing	19%	23	2%	3

Source: Scottish Government, Scottish Index of Multiple Deprivation (2020)

- 3.3.9 The site is located in data zone S01013173 as depicted in Figure 3-2 below. The indicates higher levels of deprivation to the south of the site, towards Clydebank, with areas in the top 20% and 10% most deprived. The 'access to services' is in particular is ranked within the top 20% most deprived.

Figure 3-2 – Data zone S01013173, Scottish Index of Multiple Deprivation (2020)



Source: Scottish Government, Scottish Index of Multiple Deprivation (2020)

- 3.3.10 SIMD 2020 indicates West Dunbartonshire has high levels of income and employment deprivation, and the site (data zone S01013173) as having high levels of access to services deprivation. The employment opportunities generated through the SMTP and amendites provided would however directly address these domains, having a positive impact on the deprivation experienced. The variety of employment floorspace to be delivered on site provides an inclusive offering that is aligned with the skills of West Dunbartonshire residents. The proposed development will deliver c.39,950 sq.m. NIA high quality business space comprising of: manufacturing (32,000 sq.m NIA); offices (4,130 sq.m NIA); research and development (1,938 sq.m NIA); retail, food and drink (1,601 sq.m NIA); and a nursery facility (278 sq.m NIA).

3.4 Labour Market

Economic Activity

- 3.4.1 Table 3-5 below presents key metrics of economic activity across the Study Areas, including the economic activity rate which measures the percentage of the population (employed and unemployed) that represents the available labour supply (16-64 years).

Table 3-5 – Key economic activity metrics

Study Area	Economic Activity Rate (16-64 years)	Employment Rate (16-64 years)	Median Full Time Gross Annual Pay
West Dunbartonshire	77.3%	73.9%	£27,198
Glasgow City Region	75.3%	72.2%	£30,023 ⁶
Scotland	77.5%	74.8%	£30,000

Source: ONS, Annual Population Survey, Jan 2019-Dec 2019; ONS, Annual Survey of Hours and Earnings, 2018

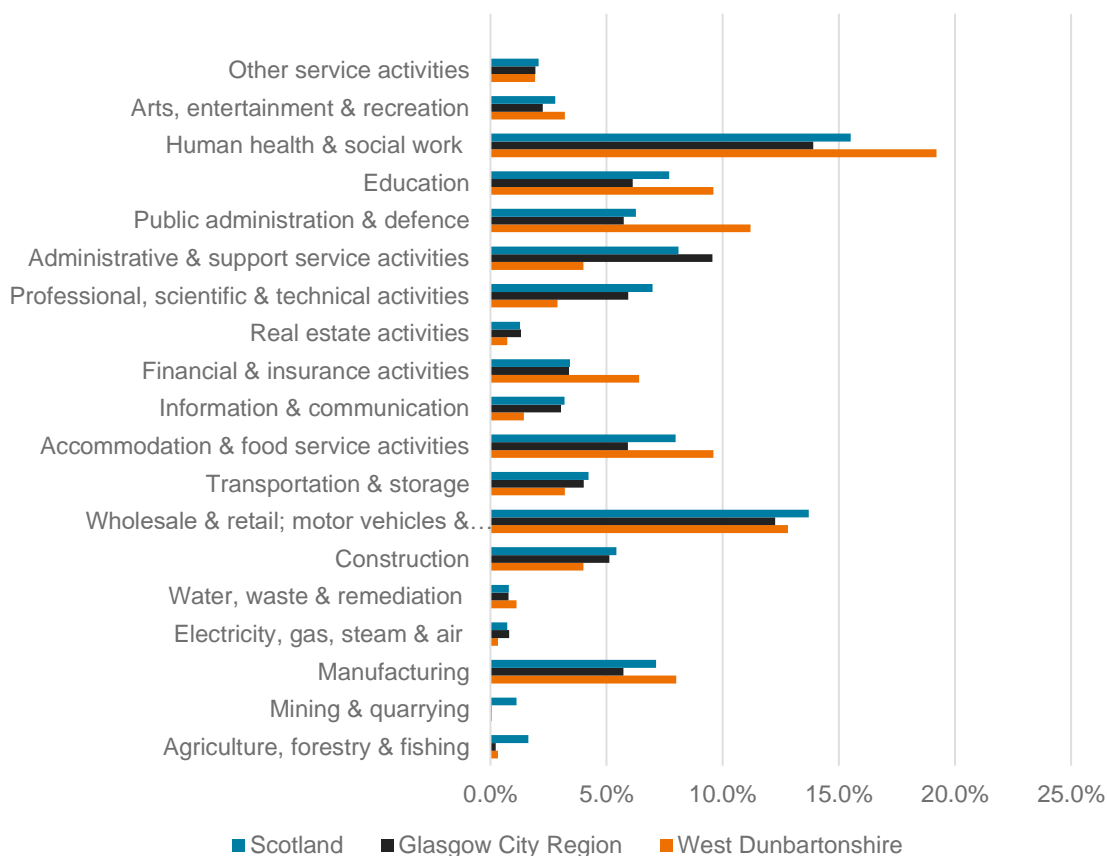
- 3.4.2 Median full time gross annual pay in West Dunbartonshire was 9.4% (£27,198) below that for the GCR (£30,023) and 9.3% below that for Scotland (£30,000). This is reflective of the occupational profile (Figure 3-4) and industries of employment (Figure 3-3) within each area.
- 3.4.3 Economic activity is a representation the proportion of those working or looking for work at the time of data collation. In 2019, the data indicates that despite a decreasing population, West Dunbartonshire exhibits an economic activity rate (77.3%) comparable with that for Scotland (77.5%). It is also 2% above that for the GCR (75.3%).
- 3.4.4 The employment rate represents the number of people in employment, divided by the total population. West Dunbartonshire has an employment rate of 73.9% and GCR 72.2%, indicative of a higher proportion of those seeking employment in West Dunbartonshire. Both areas exhibit an employment rate below that for Scotland (74.8%).
- 3.4.5 The unemployment rate represents the number of employed people divided by the number of economically active people (16-64 years). West Dunbartonshire had a higher unemployment rate in 2019 (4.6%) compared to the GCR (4.0%) and Scotland (3.5%).
- 3.4.6 The key labour market metrics presented above suggests that West Dunbartonshire has a shortfall in employment opportunities. To help overcome this, the proposed development will create new employment opportunities (1,130 jobs net additional to the City Region; see Chapter 4- Economic Impact Assessment) which will support growth in the economic activity rate and employment rate, whilst contributing to a reduction in unemployment. The specialisation of some employment opportunities at the proposed development will also contribute towards an increase in the median full time gross annual pay for West Dunbartonshire.

⁶ Presented as a median figure of that for the area which comprise of the Clyde Valley (West Dunbartonshire; East Dunbartonshire; East Renfrewshire; Renfrewshire; North Lanarkshire; South Lanarkshire; Inverclyde; and Glasgow City).

Employment by Sector

3.4.7 Figure 3-3 presents the employment by industry profile across the Study Areas.

Figure 3-3 – Employment by Industry (2018)



Source: Business Register and Employment Survey (2018) Breakdown available at Appendix B

3.4.8 Human health and social work activities is seen to be the leading industry of employment across West Dunbartonshire (19.2%), GCR (13.9%) and Scotland (15.5%). This is followed by employment in wholesale and retail trade; repair of motor vehicles and motorcycles (West Dunbartonshire, 12.8%; GCR 12.3%; and Scotland 13.7%).

3.4.9 Manufacturing and construction employment statistics are discussed below in Section 3.5- Key Business Sectors.

3.4.10 Median annual gross pay by sector (SIC two digit) at a Scotland level (2019) indicates that manufacturing generally commands a higher salary than transportation and storage (Table 3-6).

Table 3-6 – Median Annual Gross Pay by Sector (2019)

Sector	Median Annual Gross Pay (2019)
Manufacturing	£30,637
Manufacture of fabricated metal products (except machinery and equipment)	£29,193
Manufacture of other transport equipment	£41,677

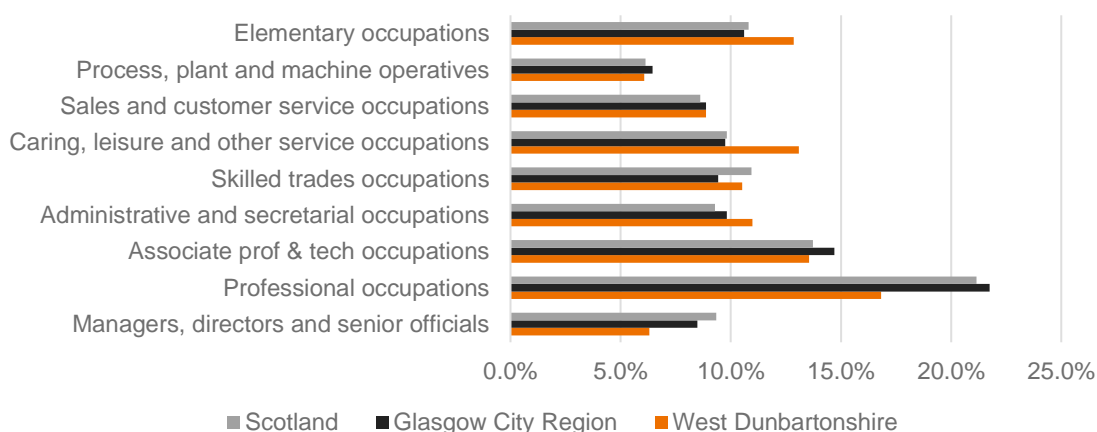
Sector	Median Annual Gross Pay (2019)
Transportation and storage	£30,831
Land transport and transport via pipelines	£30,161
Water transport	£ 34,314
Warehousing and support activities for transportation	£33,643

Source: Annual Survey of Hours and Earnings, 2019

Occupational Profile

- 3.4.11 Figure 3-4 presents employment by Standard Occupational Classification (SOC) for the Study Areas, categorising jobs into groups according to the concepts of “*skill level*”⁷ and “*skill specialisation*”⁸.

Figure 3-4 – Employment by Standard Occupational Classification (2019)



Source: ONS, Annual Population Survey, Jan 2019-Dec 2019

- 3.4.12 Professional occupations (SOC3) is the leading employment classification for West Dunbartonshire (16.8%), GCR (21.8%) and Scotland (21.1%). This is reflective of employment opportunities which require a degree or equivalent qualification, with some occupations requiring postgraduate qualifications and/or a formal period of experience-related training.
- 3.4.13 West Dunbartonshire has a larger proportion of those with skilled trade occupations (10.5%) than the wider GCR (9.4%), indicative of lower leakage rates. This does however suggest that there may be a higher level of displacement if those currently employed in skilled trade occupations seek employment at the proposed development, leaving a skills shortage for other firms.

⁷ Skill levels are approximated by the length of time deemed necessary for a person to become fully competent in the performance of the tasks associated with a job.

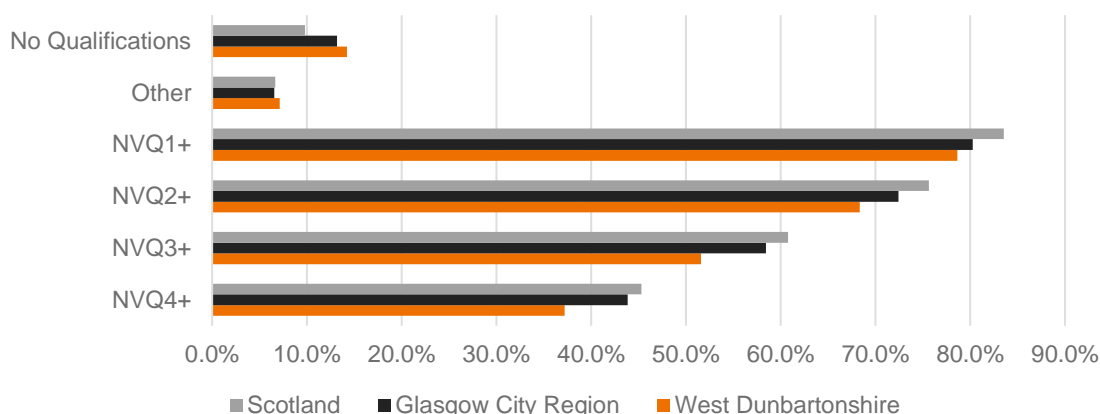
⁸ Skill specialisation is defined as the field of knowledge required for competent, thorough and efficient conduct of the tasks that comprise a job.

3.4.14 Occupations for West Dunbartonshire (Figure 3-3) present an existing profile of “*skill level*”⁹ and “*skill specialisation*”¹⁰ suitable to the employment opportunities the proposed development would support from those within the MFC (DC19/046) to onsite offices and R&D / Innovation positions.

Skills Profile

3.4.15 Figure 3-5 below presents the working age population (16-64 years) by National Vocational Qualification (NVQ) achievement levels across the Study Areas.

Figure 3-35 – Working age population by highest qualification held (2019)



Source: ONS, Annual Population Survey, Jan 2019-Dec 2019

3.4.16 West Dunbartonshire has a high proportion of residents with NVQ1 or above (78.6%), comparable with the skill profile for GCR (80.3%) and Scotland (83.5%).

3.4.17 NVQ4 or above qualifications by residents in West Dunbartonshire (37.2%) are 8.1% below that for Scotland (45.3%) and 6.7% below that for the GCR (43.8%).

3.4.18 Both West Dunbartonshire (14.2%) and GCR (13.2%) exhibit a higher proportion of residents with No Qualifications compared to Scotland (9.8%). This is likely to be reflective of the occupational profile (Figure 3-4) and industries of employment (Figure 3-3) within each area.

3.4.19 The skills profile across the Study Areas has identified an appropriate mix to support the variety of employment opportunities to be created through the proposed development, including those highly skilled. The employment opportunities offered within the SMTP will provide opportunities for upskilling, helping to address barriers to labour market access.

Skill Training Opportunities

3.4.20 There are a number of skill training and educational facilities proximate to the site which offer a range of courses relevant to the proposed employment opportunities. Courses include: fabrication; welding; engineering; electrical engineering; marine engineering; construction; project management; and a variety of health and safety courses.

3.4.21 The following educational establishments are well connected to the site, offering a range of courses from National Qualifications (NQ) and National Certificates (NC) level to a Higher National Certificate (HNC) or Higher National Diploma (HND):

- West College Scotland;
- Glasgow Clyde College;
- City of Glasgow College;

⁹ Skill levels are approximated by the length of time deemed necessary for a person to become fully competent in the performance of the tasks associated with a job.

¹⁰ Skill specialisation is defined as the field of knowledge required for competent, thorough and efficient conduct of the tasks that comprise a job.

- West College Scotland; and
 - Glasgow International College.
- 3.4.22 The City of Glasgow College notably includes the Glasgow College of Nautical Studies, offering nautical and maritime studies and marine and offshore training courses.
- 3.4.23 Skills training is available to degree level across a number of higher-education establishments that are well connected to the site. This includes:
- University of Glasgow;
 - University of Strathclyde – a confirmed early supporter of the SMTP and discussions are ongoing on how they could house a facility on the site focusing on developing techniques in support of large scale marine manufacturing;
 - University of the West of Scotland; and
 - Glasgow Caledonian University.
- 3.4.24 In addition, the Malin Group offer a Graduate Training Scheme, supported by both internal and external formal training courses.
- 3.4.25 Recruitment guides¹¹ for Malin Group highlight the breadth of skills required within the business and opportunities include: naval architects; design draughtsmen; structural engineers and project managers; lifting engineers; heavy haulage experts; project managers and marine operations personnel. Malin Group however employ a number of skilled trade occupations including supervisors, welders, platers and fitters.
- 3.4.26 The employment profile held by Malin Group's operations is aligned with that of West Dunbartonshire which exhibits a leading employment classification of professional occupations (16.8%), alongside a large proportion of those with skilled trade occupations (10.5%). The skills profile for West Dunbartonshire moreover has an appropriate mix to support the variety of employment opportunities to be created through the SMTP.

Travel to Work

- 3.4.27 The 2011 Census captured travel to work data at a local authority level with West Dunbartonshire experiencing a net daily outflow of over 7,000 people (10,567 in-commuters and 17,724 out-commuters).
- 3.4.28 A high proportion of leakage from West Dunbartonshire was also identified, with workers commuting into other areas to take up employment opportunities. The out-commuting profile was primarily to Glasgow City (59.1%) and Argyll and Bute area (14.9%). Conversely, the largest proportion in-commuters come from Glasgow City (39.3%), East Dunbartonshire (12.7%) and Renfrewshire (13.1%).
- 3.4.29 The travel to work data identifies an opportunity to maintain and improve in-commuting whilst seeking to reduce out-community by creating attractive employment opportunities within West Dunbartonshire. The proposed development will create a variety of attractive employment opportunities as detailed in Table 4-2

Site Accessibility

- 3.4.30 The site has a single point of access via a private road from Erskine Ferry Road immediately north west of the site, which in turn links to the A814 Dumbarton Road. The private road presently provides access for staff and deliveries to adjacent industrial premises east of the site (including those noted in Table 3.2).
- 3.4.31 Erskine Ferry Road crosses the Forth and Clyde Canal to meet the A814 Dumbarton Road at a 4-way signalised junction. This road carries traffic from Bowling in the west towards Clydebank and on to Glasgow. The road runs parallel to the Forth & Clyde Canal for much of its length.
- 3.4.32 The nearest rail station is Kilpatrick (15 mins walk) which is on the Dalmuir line and provides a half-hourly service from Dumbarton to Cumbernauld, via Glasgow Queen Street. The station

¹¹ Malin Group, 2020, Student Guide. Available at: <http://www.malingroup.com/wp-content/uploads/2020/08/A-students-guide-Malin-Group-Rev-00.pdf>

can be reached from the site on foot via Lusset Glen with a remote footpath providing a connection beneath the A898.

- 3.4.33 The nearest bus services for the site are found in very close proximity on either side of the A814 Dumbarton Road (5 mins walk / 500 metres).

3.5 Key Business Sectors

Construction

- 3.5.1 The construction sector (2018) in West Dunbartonshire supports some 1,250 jobs, representing 4.0% of the total jobs in the labour market. In comparison, the sector supports some 49,700 jobs in GCR (5.1% of its labour market) and c.136,000 jobs in Scotland (5.4% of its labour market).

Manufacturing

- 3.5.2 The manufacturing sector (2018) in West Dunbartonshire supports some 2,500 jobs, representing 8.0% of the total jobs in the labour market. In comparison, the sector supports some 55,600 jobs in GCR (5.7% of its labour market) and c.179,000 jobs in Scotland (7.1% of its labour market).

Marine Engineering

- 3.5.3 There are currently two active shipyards on the Upper Clyde – one in Scotstoun and the other in Govan – both operated by defence contractor BAE Systems Plc which builds warships and defence systems for the Royal Navy.
- 3.5.4 Ferguson Marine Engineering Ltd operates a shipyard in Port Glasgow, and is currently the only builder of merchant ships in operation on the River Clyde. Their primary business is in constructing ferries which provide crucial transport links to the Scottish Isles.

3.6 Summary

- 3.6.1 The baseline conditions have identified the following characteristics for West Dunbartonshire:
- An established reputation for innovation, manufacturing, technology and recycling within the 20-minute Study Area;
 - A decreasing population and relatively low working age (16-64 years) population compared to the surrounding Glasgow City Region;
 - A high proportion of deprivation, both in overall rank and across individual domains;
 - A high economic activity rate and a high unemployment rate indicative of a high proportion of those looking for work;
 - Lower median full time gross annual pay in West Dunbartonshire compared to GCR and Scotland;
 - West Dunbartonshire has a larger proportion of those with skilled trade occupations than the wider GCR, indicative of lower leakage rates. This does however suggest that there may be a higher level of displacement as those currently employed in skilled trade occupations seek employment at the proposed development, leaving a skills shortage for other firms;
 - An occupational and skills profile compatible with the employment opportunities at the proposed development; and
 - An out-commuting profile to Glasgow City and Argyll & Bute.

4 Economic Impact Assessment

4.1 Introduction

- 4.1.1 This Chapter takes account of the updated policy context (Chapter 2) and baseline conditions (Chapter 3) and parameters of the Proposed Development (Table 4-2) to conduct an assessment of its potential impact during the construction and operation phases of development, compliant with HM Treasury Green Book guidance (2018). This Chapter also presents a sensitivity analysis to examine the effect of changing key variables in the economic model (Section 4.4.18).
- 4.1.2 The economic model has assessed:
- **Construction effects:** employment and gross value added (GVA)¹² from the construction of the technology park;
 - **Operational effects:** employment and GVA from the marine manufacturing and supporting businesses on site.
- 4.1.3 The impacts assessed are detailed at three spatial levels: West Dunbartonshire, GCR and Scotland. Costs and benefits are rounded to the nearest £100,000, while employment is rounded to the nearest five jobs.

4.2 Logic Model

- 4.2.1 A logic model (Table 4-1) has been prepared to illustrate the relationship between the strategic needs surrounding Malin Group's proposed development. This model provides the basis for the economic impacts which are then monetised in the assessment below.

Table 4-1 – Logic Model

Strategic Need: <i>What needs to be addressed?</i>	Deliverables: <i>What will be delivered?</i>	Outcomes: <i>What will be the outcomes?</i>	Benefits: <i>What will be the benefits?</i>
<p>17.7 ha of vacant and derelict land, with a known presence of hydrocarbon contaminants.</p> <p>A decline of marine manufacturing along the River Clyde and within the GCR</p> <p>Challenging socio-economic baseline conditions, namely:</p> <ul style="list-style-type: none"> • A decreasing population and a relatively low working age (16-64 years) population compared to the national average; 	<p>Delivery of the SMTP comprising of 39,950 sq.m NIA high quality business space comprising of the following key employment floor space:</p> <ul style="list-style-type: none"> • Manufacturing (32,000 sq.m NIA); • Offices (4,130 sq.m NIA); • Research and development (1,938 sq.m NIA); • Retail, food and drink (1,601 sq.m NIA); and 	<p>The SMTP will enable Malin Group to consolidate its marine manufacturing businesses in West Dunbartonshire.</p> <p>The wider site will also offer complementary business premises to allow leading innovators in the marine industry to collaborate and further, marine manufacturing in the UK.</p> <p>The proposed development will enable new commitments around</p>	<p>Remediation and regeneration of a vacant site within West Dunbartonshire.</p> <p>Return of marine manufacturing to this stretch of the River Clyde.</p> <p>Local employment, wage growth and skill training opportunities.</p> <p>Reduced regional inequalities and levels of deprivation.</p> <p>Increased GVA outputs.</p> <p>Reduced levels of out-commuting and creation of an</p>

¹² Gross value added is a measure of the value of goods and services produced in an area.

Strategic Need: <i>What needs to be addressed?</i>	Deliverables: <i>What will be delivered?</i>	Outcomes: <i>What will be the outcomes?</i>	Benefits: <i>What will be the benefits?</i>
<ul style="list-style-type: none"> A high proportion of deprivation, both in overall rank and across individual domains; A high economic activity rate and a high unemployment rate indicative of a high proportion of those looking for work; Lower median full time gross annual pay in West Dunbartonshire compared to the wider Glasgow City Region (GCR) and Scotland; and A high out-commuting profile to Glasgow City and Argyll & Bute 	<ul style="list-style-type: none"> A nursery facility (278 sq.m NIA). 	<p>local supply chain development and the idea of a 20-minute neighbourhood, supporting the prosperity of surrounding communities.</p> <p>Improved site accessibility and wider green network enhancements, including landscaping improvements and enhanced levels of visual screening along the River Clyde.</p>	<p>attractive employment location encouraging a rebalance in the population demographics of West Dunbartonshire, namely the working age population (16-64 years).</p>

Source: Stantec, 2020

4.3 Impact Assessment Methodology

Approach

4.3.1 Stantec have developed a bespoke economic impact model to appraise the likely benefits of the SMTP. This estimates net construction and operational employment and monetises project benefits as GVA. The impact model calculates:

- **Construction benefits:** representing the employment impacts associated with temporary increased turnover in the construction sector; and
- **Operational benefits:** representing employment supported by the operation of the SMTP.

Additionality Assumptions

4.3.2 To comply with best practice, anticipated construction and operational effects have been adjusted for additionality factors. Appropriate economic appraisal guidance and understanding of the updated baseline conditions (Chapter 3) has been used to estimate values for leakage, displacement, and multipliers:

- **Deadweight:** the proportion of benefits on site that would have been brought forward in the absence of the proposed development;
- **Leakage:** the proportion of benefits which are retained by those living outside the relevant Study Area;

- **Displacement:** the proportion of benefits accounted for from the proposed development by a reduction in benefits elsewhere; and
- **Multiplier:** an estimation of further economic activity associated with additional income and supplier purchases (i.e. indirect and induced expenditure).

Employment Floorspace

- 4.3.3 Consistent with the methodology set out in the HCA Employment Densities Guide, net internal area (NIA) has been used to estimate operational employment were stated. The gross external area (GEA) of the buildings presented in Table 4-2 below have been adjusted according to the type of activity proposed.

Table 4-2 - Employment floorspace

Ref.	Use	GEA (sq.m)	GIA (sq.m)	NIA (sq.m)
1	Tier 1	3,975	3,578	3,578
2	Recycling/Outfit/Construction hall	9,280	8,352	8,352
3	Boat Repair	2,250	2,025	2,025
4	Boat Repair	2,250	2,025	2,025
5	Tier 1	3,200	2,880	2,880
6	Tier 2	2,500	2,250	2,250
7	Tier 2	2,500	2,250	2,250
8	Tier 2	2,500	2,250	2,250
9	Tier 2	2,000	1,800	1,800
10	Tier 2	900	810	810
11	Tier 2	900	810	810
12	Training/Research	2,000	1,700	1,615
13	R&D/Innovation	2,400	2,040	1,938
14	Offices	2,400	2,040	1,938
15	Café	500	425	404
16	Restaurant/Gym/Retail	1,400	1,260	1,197
17	Nursery	325	293	278
18a	Marine Fabrication Complex (DC19/046)	3,300	2,970	2,970
18b	Ancillary office accommodation (DC19/046)	714	607	577

Source: GD Lodge Architects [Drawing 2819/01/D] on behalf of Malin Group Properties Ltd

Capital Expenditure

- 4.3.4 Capital expenditure has been estimated using Building Cost Information Service (BCIS) Average Prices for buildings of this nature and type. The construction cost of the buildings in the Marine Technology Park is estimated to be £89.5m. The overall cost will be higher once the cost of remediation, site preparation works, landscape works and the new jetties have been included. The construction phase impacts are therefore a conservative assessment.

4.4 Economic Impacts

Construction Impacts

Gross Employment

- 4.4.1 Gross construction employment is estimated by dividing the capital expenditure figure above (£89.5 million) by the average turnover required to support an employee in the construction sector across Scotland (£150,132).¹³
- 4.4.2 This is then monetised to arrive at a figure for the overall economic contribution by multiplying the number of jobs by the average sector productivity of £57,908 GVA per head.
- 4.4.3 The construction of the proposed development is therefore estimated to support 595 gross temporary construction jobs over the construction period, generating £34.5 million in sector output.

Net Employment

- 4.4.4 Only a proportion of the construction jobs will be *net additional* within each Study Area due to mobility of labour and competition from construction firms located outside the study area. Additionally, the gross construction figures detailed above do not take account of any induced employment through the interaction of the construction programme with other firms within the supply chain of the primary contractor.
- 4.4.5 To take account of these factors, the additionality assumptions detailed in Table 4-3 below have been used to convert the estimated gross construction employment from the proposed development into overall net construction phase employment.

Table 4-3 - Additionality Assumptions (Construction)

	WDC	GCR	Scotland
Leakage	30%	10%	5%
Displacement	10%	30%	60%
Multiplier	1.41	1.64	1.85

- 4.4.6 The rationale for each additionality assumption is as follows:
- **Deadweight:** assumed as zero. The abnormal site constraints (land remediation, ground contamination, access infrastructure etc) discourages any development on site without the intervention of Malin Group;
 - **Leakage:** The construction sector is sizable across the Study Area's employing some 4-5% of the labour market within in each. However, travel to work data (para 3.4.27 above) highlights significant employment leakage with large movements between West Dunbartonshire, Glasgow City, East Dunbartonshire and Renfrewshire. It is also recognised that the construction sector has high levels of mobility associated with live projects;
 - **Displacement:** Within the context of the on-going COVID-19 pandemic, the construction sector has slowed down, resulting in fewer sites coming forward. This presents a reduced opportunity for displacement to occur;
 - **Multiplier:** Type II Scottish multiplier has been used for the construction industry¹⁴, and adjusted to reflect the degree of construction activity within each Study Area. It is anticipated that some induced and supply chain impact may take place elsewhere in Scotland.
- 4.4.7 Based on the above additionality assumptions, the 595 gross temporary construction jobs are estimated to support approximately:
- 530 net temporary construction jobs to West Dunbartonshire, resulting in £30.7m GVA;

¹³ Scottish Government, 2020, Scottish Annual Business Statistics.

¹⁴ Scottish Government (2015). Input-Output tables.

- 615 net temporary construction jobs to the Glasgow City Region, resulting in £35.6m GVA; and
- 420 net temporary construction jobs to Scotland, resulting in £24.3m GVA.

Operation Impact Assessment

Floorspace by Sector

- 4.4.8 Table 4-4 presents the NIA floorspace for the proposed development by sector. The land uses anticipated to generate employment on site have been assumed to be 95% occupied at maximum capacity.

Table 4-4 - Employment Floorspace by Sector

Floorspace by Sector	NIA (sq.m)
Manufacturing	32,000
Offices	4,130
Research and Development	1,938
Retail, food and drink	1,601
Nursery	278
Total	39,946 ~ rounded to 39,950

Employment Parameters

- 4.4.9 To measure the impact of employment from the above identified sectors (Table 4-5), employment densities have been applied to generate employment outputs.
- 4.4.10 GVA per worker has been calculated from the latest Scottish Government's Scottish Annual Business Statistics (2018) release and uprated to 2020 prices using the gross domestic product deflator¹⁵.
- 4.4.11 Table 4-5 below presents the employment density and GVA per worker employment parameters.

Table 4-5 - Employment Parameters

Sector	Employment Density	Productivity
Manufacturing	36 sq.m / FTE	£71,077 per worker
Offices	13 sq.m / FTE	£32,762 per worker
Research and Development	50 sq.m / FTE	£57,941 per worker
Retail, food and drink	15 sq.m / FTE	£20,815 per worker
Nursery	20 sq.m / FTE	£11,156 per worker

Source: Stantec, 2020

Gross Employment

- 4.4.12 Utilising the above employment parameters, Table 4-6 below presents the gross operational employment stimulated by the proposed development and the associated annual GVA uplift once fully occupied.

¹⁵ Consistent with the Office for Budget Responsibility, Budget 2020, Economic and fiscal outlook, 11th March 2020

Table 4-6 - Annual Gross Operational Outputs

Sector	Gross Jobs	Gross GVA uplift
Manufacturing	845	£60.1m
Offices	300	£9.8m
Research and Development	35	£2.0m
Retail, food and drink	100	£2.1m
Nursery	15	£0.2m
Total	1,295	£74.2m

Source: Stantec, 2020

- 4.4.13 The proposed development is estimated to support some 1,295 gross operational jobs, resulting in £74.2m GVA every year.

Net Employment

- 4.4.14 Additionality assumptions detailed in Table 4-7 below have been used to estimate how many of the gross jobs supported at the SMTP will be net additional.

Table 4-7 - Additionality Assumptions (Operation)

	Leakage			Displacement			Multiplier		
	WDC	GCR	Scotland	WDC	GCR	Scotland	WDC	GCR	Scotland
Manufacturing	20%	3%	3%	15%	30%	45%	1.21	1.30	2.20
Offices	30%	10%	5%	15%	30%	70%	1.00	1.40	2.00
Research and Development	20%	10%	3%	10%	25%	65%	1.05	1.43	1.90
Retail, food and drink	3%	3%	3%	30%	50%	60%	1.30	1.40	1.30
Nursery	15%	15%	15%	50%	50%	50%	1.60	1.60	1.60

- 4.4.15 The rationale for each additionality assumption is as follows:

- **Deadweight:** assumed as zero across all sectors. The abnormal site constraints (land remediation, ground contamination, access infrastructure etc) discourages any development on site without the intervention of Malin Group;
- **Leakage:** In light of the specialist skills required for some employment opportunities at the proposed development, a high level of leakage has been presented for certain sectors within the Study Area's. The leakage also takes cognisance of the travel to work patterns discussed in para 3.4.27 above.
- **Displacement:** Displacement is likely to be localised and relatively high for retail and food, drink, and nursey. However for the bulk of activity at the SMTP, displacement will be relatively low from operators such as Ferguson Marine or BAE in Glasgow and has been accounted for at the GCR and national level;

- **Multiplier:** Type II Scottish multiplier has been used for the construction industry¹⁶, and adjusted to reflect the degree of construction activity within each Study Area. It is anticipated that some induced and supply chain impact may take place elsewhere in Scotland.

4.4.16 Based on the above additionality assumptions, the gross operational jobs are estimated to support overall approximately:

- 1,000 net operational jobs to West Dunbartonshire, resulting in £58.7m GVA annually once the proposed development is fully occupied
- 1,130 net operational jobs to the Glasgow City Region, resulting in £65.6m GVA annually once the proposed development is fully occupied; and
- 1,250 net operational jobs to Scotland, resulting in £78.9m GVA annually once the proposed development is fully occupied.

4.4.17 Table 4-8 below presents the economic impacts anticipated by sector.

Table 4-8 - Net economic impacts

	West Dunbartonshire		Glasgow City Region		Scotland	
	Net Jobs	GVA uplift	Net Jobs	GVA uplift	Net Jobs	GVA uplift
Manufacturing	695	£49.4m	750	£53.3m	995	£70.7m
Offices	180	£5.9m	265	£8.7m	170	£5.6m
Research and Development	25	£1.4m	35	£2.0m	25	£1.4m
Retail, food and drink	90	£1.9m	70	£1.5m	50	£1.0m
Nursery	10	£0.1m	10	£0.1m	10	£0.1m
Total	1,000	£58.7m	1,130	£65.6m	1,250	£78.9m

Source: Stantec, 2020

4.4.18 The SMTP will help bolster the employment profile across each Study Area, in particular employment associated with manufacturing through the proposed development is estimated to support some 695 net operational jobs in West Dunbartonshire, 750 net operational jobs in the GCR and 995 net operational jobs in Scotland. The wider occupation skills profile likely to be employed at SMTP will also offer opportunities to the existing large proportion of professional and skilled trade occupations in West Dunbartonshire.

4.5 Sensitivity Testing

Additional Land Development

4.5.1 Malin Group has indicated that the site may be expanded in due course to include an additional six acres of land to the north of the Whisky Bond on Beardmore Street. Table 4-9 below shows the potential impacts of the SMTP if this land were also developed for industrial purposes. It assumes that buildings are developed at a similar density on the additional land as they will be in the current draft masterplan document (Figure 1-2)

¹⁶ Scottish Government (2015). Input-Output tables.

Table 4-9 - Net economic impacts including additional land to the north

	West Dunbartonshire		Glasgow City Region		Scotland	
	Net Jobs	GVA uplift	Net Jobs	GVA uplift	Net Jobs	GVA uplift
Manufacturing	815	£58.0m	880	£62.6m	1170	£83.1m
Offices	180	£5.9m	265	£8.7m	170	£5.6m
Research and Development	25	£1.4m	35	£2.0m	25	£1.4m
Retail, food and drink	90	£1.9m	70	£1.5m	50	£1.0m
Nursery	10	£0.1m	10	£0.1m	10	£0.1m
Total	1,120	£67.4m	1,260	£74.9m	1,425	£91.3m

Source: Stantec, 2020

- 4.5.2 At a City Region level, this additional development would support 130 additional manufacturing jobs, generating £9.3 million in GVA every year once fully occupied.

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- Office of National Statistics (2018) Business Register and Employment Survey
- Office of National Statistics (2017) Regional gross value added (balanced) by local authority in the UK
- Office of National Statistics (2011) Census, travel to work data
- Scottish Government (2020) Scottish Index of Multiple Deprivation

Appendix B Employment by Sector

	West Dunbartonshire	Glasgow City Region	Scotland
Agriculture, forestry & fishing	0.3%	0.2%	1.6%
Mining & quarrying	0.1%	0.0%	1.1%
Manufacturing	8.0%	5.7%	7.1%
Electricity, gas, steam & air	0.3%	0.8%	0.7%
Water, waste & remediation	1.1%	0.8%	0.8%
Construction	4.0%	5.1%	5.4%
Wholesale & retail; motor vehicles & motorcycles	12.8%	12.3%	13.7%
Transportation & storage	3.2%	4.0%	4.2%
Accommodation & food service activities	9.6%	5.9%	8.0%
Information & communication	1.4%	3.0%	3.2%
Financial & insurance activities	6.4%	3.4%	3.4%
Real estate activities	0.7%	1.3%	1.3%
Professional, scientific & technical activities	2.9%	5.9%	7.0%
Administrative & support service activities	4.0%	9.6%	8.1%
Public administration & defence	11.2%	5.7%	6.3%
Education	9.6%	6.1%	7.7%
Human health & social work	19.2%	13.9%	15.5%
Arts, entertainment & recreation	3.2%	2.3%	2.8%
Other service activities	1.9%	1.9%	2.1%

