Main Issues Report
Topic Paper

6

Economy
Translation Services

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1. Introduction

1.1 This paper is one of a range of background papers that have been prepared in support of the Angus Local Development Plan (LDP) Main Issues Report. It deals with how planning policy and land availability can support sustainable economic development in Angus. Other papers on spatial strategy, climate change and infrastructure will influence the final policy direction and land allocations.

1.2 The aim of this paper is to discuss how to achieve sustainable economic growth which can support local prosperity, and to identify the associated main issues and options for inclusion in the Main Issues Report (MIR). It therefore supports the Main Issues Report and provides reasons for the content of that document, with regard to some of the main issues affecting future sustainable economic development.

2. Background

2.1 As an integral part of the overall government strategy to promote sustainable economic development, the Local Development Plan will deliver the spatial land-use framework for the Angus area. It will complement the Council’s social and employment priorities as defined in the Council’s Community Plan and Single Outcome Agreement (2011 – 2014); and the Angus Economic Development Strategy 2008-2011. Whilst economic prosperity is central to the Scottish Government’s objective, this must be viewed within the context of the Climate Change Agenda and the aim of promoting sustainable development whilst avoiding or mitigating unacceptable environmental impacts.

National Planning Framework

2.2 One of the key aims of the second National Planning Framework (NPF2), which establishes the strategy for Scotland’s spatial development to 2030, is to contribute to a wealthier and fairer Scotland by supporting sustainable economic growth, improved competitiveness and greater connectivity. NPF2 identifies Angus as part of the strategic east coast development area and supports Dundee City as a concentration of economic activity. Direct investment proposals are included where they are classified as National Developments. In Angus this comprises electricity grid reinforcement to support renewable energy generation from on-shore and off-shore projects.

Scottish Planning Policy

2.3 NPF2 is supported by Scottish Planning Policy (SPP) which identifies ‘increasing sustainable economic growth’ as the central purpose of the Scottish Government. Achieving this requires a planning system that enables the development of growth enhancing activities across Scotland and protects and enhances the quality of the natural and built environment as an asset for that growth.

2.4 Decisions on the location of new development should:
  • promote regeneration and the re-use of previously developed land;
  • reduce the need to travel and prioritise sustainable travel and transport opportunities;
• promote the development of mixed communities;
• take account of the capacity of existing infrastructure;
• promote rural development and regeneration; and
• prevent further development which would be at risk from flooding or coastal erosion.

Economic Development

2.5 Various activities do and will contribute to sustainable economic growth such as meeting the diverse needs and locational requirements of different sectors and sizes of businesses; taking a flexible approach to meet changing circumstances and new economic opportunities; and providing scope for expansion and growth (Para 45). This will be realised by:
• promoting development in sustainable locations, particularly in terms of accessibility;
• promoting regeneration and the full and appropriate use of land, buildings and infrastructure;
• supporting development which will provide new employment opportunities and enhance local competitiveness;
• promoting the integration of employment generating opportunities with supporting infrastructure and housing development; and
• being responsive and sufficiently flexible to accommodate the requirements of inward investment and growing indigenous firms.

2.6 The development plan should allocate a range and choice of marketable sites and locations to meet anticipated requirements for businesses including mixed use development. 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. Identified sites that are no longer considered appropriate or marketable will be reallocated through the development plan for another use (Para 46). Development plans should also support small business development and growth and promote opportunities for low impact businesses, mixed use and working from home where the amenity of surrounding properties will not be significantly affected (Para 47).

2.7 Planning authorities should support high quality tourism related development and opportunities for specialist activities such as research & development which will be attracted by, and benefit from, the maintenance of environmental quality. The development plan should ensure that new development safeguards and enhances an area’s environmental quality and, where relevant, should promote and support opportunities for environmental enhancement and regeneration. This includes proposals to bring vacant or derelict land back into productive use for development or to create more attractive environments e.g. through identifying where investment in site assembly, remediation, infrastructure and environmental improvement will enable successful development in the longer term (Para 48).

2.8 Strategic business locations (Para 49-51) such as mixed developments, business parks, science parks, medium and large industrial sites and high amenity business locations should be identified as part of the Strategic Development Plan. These sites should be protected from inappropriate uses and development which would compromise their quality, accessibility or marketability as a business location.
Town Centres and Retailing

2.9 Town centres provide employment and services for local communities; are a focus for civic activity; and make an important contribution to sustainable economic growth. They should provide a high level of accessibility, a sense of place and a range of shopping, economic and social activity in both the day and the evening. Integration with residential areas and the quality of the environment are key elements of successful town centres (Para 57). Commercial centres are distinct from town centres and generally have a more specific focus on retailing or on retailing and leisure uses. The development plan should identify:-
- town, commercial and other centres;
- suitable and viable development sites in terms of size, location and availability within a reasonable time period if appropriate;
- opportunities to improve physical quality and sustainability; and
- the potential to reduce impacts on the environment.

2.10 Vitality and viability give an indication of the health of a town centre and regular health checks (which can include indicators such as footfall; rental values; space in use; vacancy levels; physical factors etc) can highlight changes in performance and inform future decision making (Para 59). Such monitoring can inform town centre strategies which authorities are encouraged to develop to support improvements to town centres and to create distinctive and successful places (Para 60).

2.11 All retail, leisure and related developments should be accessible to people by walking, cycling and public transport; the delivery of goods; and for waste collection. The perception of convenience is also important, for example whether a location is close to homes or places of work; is easily accessible by foot, public transport or by car with available short term parking (Para 61).

2.12 The sequential approach should be used when selecting locations for all retail and commercial leisure uses and an impact analysis will be required for retail and leisure proposals which may have a significant impact on vitality and viability of defined town centres (Para 63 - 65).

Rural Development

2.13 The planning system has a significant role in supporting sustainable economic growth in the rural areas (Para 92) – which comprise most of Angus. Development plans should promote economic activity and diversification whilst protecting the distinctiveness of rural areas and ensuring the protection of the natural and cultural heritage. They should support opportunities for small scale housing development in all rural areas, which is linked to rural businesses or would support the formation of new businesses by providing funding (Para 94).

2.14 In more accessible and densely populated rural areas, most new development should be in or adjacent to settlements. In less populated areas, small scale housing and other development which supports diversification and other opportunities for sustainable economic growth, whilst respecting and protecting the natural and cultural heritage, should be supported in a range of locations. In these areas, new housing outwith existing settlements may have a part to play in economic regeneration and environmental renewal (Para 95).
Renewable Energy

2.15 The development plan should support a diverse range of renewable energy technologies taking account of relevant economic, social, environmental and transport issues and maximise benefits (Paras 182-196). Issues and opportunities arising should be addressed in the development plan (Paras 192 – 195). A spatial framework for windfarms over 20MW is to be included in local development plans and may also incorporate proposals below 20MW, identifying areas of search and of constraint, including cumulative impact (Paras 187-191). Off shore renewable energy projects are likely to affect Angus and the development plan should identify appropriate locations for associated facilities (Para 192).

2.16 The SPP contains a wide range of other policy areas that will relate to the development of a sustainable economy including housing, environment and infrastructure, and these will be incorporated as appropriate but are not specifically addressed within this paper.

Letter from Ministers for Energy and Tourism and for Local Government and Planning - Onshore Wind – Planning Issues and Support

2.17 The letter of 19 June 2012 to COSLA/Heads of Planning Services requires Spatial Frameworks to form part of the Development Plan as required by SPP rather than in interim supplementary guidance.

TAYplan Strategic Development Plan (June 2011)

2.18 The TAYplan Strategic Development Plan (SDP) sets the strategic planning context for Angus, identifying development opportunities and guidance which will direct the Local Development Plan (LDP). TAYplan establishes priorities for development; a hierarchical approach to investment; and a spatial framework for economic development including retailing, tourism, energy and strategic sites in support of the vision statement:-

‘By 2032 the TAYplan region will be sustainable, more attractive, competitive and vibrant without creating an unacceptable burden on our planet. The quality of life will make it a place of first choice where more people choose to live, work study and visit, and where businesses choose to invest and create jobs’

2.19 The Spatial Strategy in TAYplan prioritises land release for development within, or if this is not feasible, on the edge of the principal settlements (Policy 1). Within this context Policy 3: Managing TAYplan’s Assets states that the LDP should:-

- identify and safeguard at least 5 years supply of employment land within principal settlements to support the growth of the economy and a diverse range of industrial requirements;
- safeguard areas identified for class 4 office type uses in principal settlements; and,
- further assist in growing the year-round role of the tourism sector.

2.20 The Angus towns all have a contribution to make to the regional economy relative to their size and Strategic Development Areas (Policy 4) are identified at Forfar and Montrose:-

- Orchardbank, Forfar – 25ha of employment land.
Forfar Regional Agricultural Service centre - The LDP will consider the need for any new sites, together with existing sites. This Proposal further promotes the role of the agricultural service sector in the area but may not require sites.

Montrose Port – Employment land for port related uses.

2.21 In the rural areas outwith the principal settlements, LDPs may provide for some development if such development genuinely contributes to the objectives of this Plan and meets specific local needs or supports regeneration of the local economy.

2.22 TAYplan focuses on comparison retailing (Policy 7) and requires LDPs to identify boundaries for town, commercial and other centres in accordance with the strategic retail hierarchy. This reflects the current Angus Local Plan Review (ALPR) and SPP. Once defined these boundaries will form the basis for the sequential approach when assessing relevant planning applications. Within Angus consideration should also be given to village and farm shops in support of sustainable communities and rural diversification opportunities.

2.23 TAYplan also recognises the significance of energy conservation; reduction of emissions and the principles of designing places in achieving sustainable development; and promoting the climate change agenda through the use of renewable resources, integration of transport and land use and appropriate design and materials. (Policies 2, 5 and 6)

Angus Community Plan and Single Outcome Agreement 2011-2014

2.24 The vision of the Angus Community Planning Partnership is that: ‘Angus is a place where a first class quality of life can be enjoyed by all’ and is supported by the single outcome agreement. To achieve these national targets, Angus Council has identified a wide range of local outcomes to support the Community Planning Partnership priorities as defined in the Angus Community Plan and Single Outcome Agreement. A number of Partnership Priorities are directly related to sustainable economic development which would be supported by the provisions of the Angus Local Development Plan, including:-

Priority - Communities that are Prosperous and Fair
Local Outcome 1: Angus has a sustainable economy with good employment opportunities
- Support the Angus economy and business community
- Support people into employment
- Reduce inequalities in economic opportunity

The Local Development Plan can help achieve this outcome through the allocation of employment sites that meet business needs and thus help support the creation or retention of jobs which are accessible to local people.

Local Outcome 2: Angus is a good place to live in, work in and visit
- Encourage growth in tourism to widen employment opportunities

The LDP can help achieve this outcome through supporting appropriate development opportunities; enhancing the attractiveness of the area to
visitors and investors: and protecting the built and natural environment as the basis of the tourism sector.

**Priority – Communities that are sustainable**

Local Outcome 10: Our communities are developed in a sustainable manner
Local Outcome 11: Our natural and built environment is protected and enjoyed
Local Outcome 12: Our carbon footprint is reduced.

The LDP can help achieve this outcome through promoting development in locations that minimise the need to travel, protecting the natural and built environment from inappropriate development, and promoting design and materials which reduce emissions, minimise energy requirements and encourage use of local goods and materials where feasible.

**Angus Economic Development Strategy – Towards Sustainable Development**

2.25 The Economic Development Strategy’s overarching principle is to ‘move Angus towards achieving sustainable prosperity’ focusing on energy, tourism and food and drink as priority industries. The Strategy is based around Community Planning themes and identifies a number of strategic objectives which the LDP can help deliver:-

- Enhance physical infrastructure which supports economic activity with due regard to the environment.
- To identify and harness natural assets in Angus for economic gain without detriment to these assets.
- To identify and harness natural assets in Angus for economic gain without detriment to these assets.
- Support sustainable energy and energy efficiency initiatives.
- Promote the environmental excellence of Angus as a locational advantage for investment and attraction of visitors.

**3. Discussion**

3.1 Within this section, five distinct policy areas are considered in light of the information from Section 2 and other relevant background data. Discussion will focus on:

- employment land requirements;
- diversification of the rural economy;
- tourism, leisure and recreation facilities;
- town centres and retailing; and
- renewable energy development and contribution to the targets for electricity generation and reduction of carbon emissions.

3.2 The aim of these discussions is to identify main issues for the Angus Local Development Plan Main Issues Report, and to highlight where there are options for future land-use development. Section 4: Main Issues and Options presents the conclusions from these discussions.
Employment Land Requirements

Employment Land Supply

3.3 Table 1 shows the current employment land supply on sites identified in the ALPR as at 2011:-

- Established Land supply which comprises existing sites where serviced employment land is available and can be developed within one year (Column 1);
- Allocated sites which are identified in the ALPR and could be brought forward within five years once investment is committed, ie not physically constrained. (Column 2); and
- Column 3 combines established and allocated sites to give the current total of employment land supply as identified in the ALPR.

Table 1 – Current Employment Land Supply (ALPR)

<table>
<thead>
<tr>
<th>Location</th>
<th>Established Land Supply(Ha)</th>
<th>ALPR Allocated Sites(Ha)</th>
<th>Total Employment Land Supply(Ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arbroath</td>
<td>11.45</td>
<td>22.08</td>
<td>33.53</td>
</tr>
<tr>
<td>Forfar</td>
<td>23.1</td>
<td>4</td>
<td>27.1</td>
</tr>
<tr>
<td>Montrose</td>
<td>10.35</td>
<td>10</td>
<td>20.35</td>
</tr>
<tr>
<td>Brechin</td>
<td>7.68</td>
<td>No allocation</td>
<td>7.3</td>
</tr>
<tr>
<td>Carnoustie</td>
<td>0.39</td>
<td>15</td>
<td>15.39</td>
</tr>
<tr>
<td>Kirriemuir</td>
<td>0.33</td>
<td>4</td>
<td>4.33</td>
</tr>
<tr>
<td>Monifieth</td>
<td>No established supply</td>
<td>No allocation</td>
<td>None</td>
</tr>
<tr>
<td>Angus</td>
<td>52.92</td>
<td>55.08</td>
<td>108</td>
</tr>
</tbody>
</table>

Source - Angus Council Employment Land Survey 2011.

1. Of the 22.08 ha of land allocated for employment use West of Elliot Industrial Estate (policy A11), 14.2ha was granted consent for a Business Park (Application Ref 11/0429/FULM) in August 2011. A Compulsory Purchase Order is being progressed.

2. Land allocated for Employment Use at Carlogie Road, Carnoustie (ALPR Policy C6) is subject to a planning application for Outline Consent for Class 4, Class 5 and Class 6 (Ref No 07/01682/OUT).

3. Land allocated for Employment Use at East Muirhead of Logie, Forfar Road, Kirriemuir (ALPR Policy K5) has outline planning consent (Ref No 09/00667/OUT). Detailed planning applications have recently been submitted and are pending consideration (Ref No 12/00284/MSCL & 12/00624/FULL).

4. Monifieth is included within a tier 1 settlement and does not therefore have a TAYplan employment land allocation in its own right.

3.4 Figure 1 shows the annual take up of employment land on business parks/industrial estates in Angus between 2000/1 and 2010/11. This indicates a low and generally declining take-up which does not reflect national and international trends of economic expansion up to 2008. (The ‘spike’ on the table, reflects the relocation of a number of Angus Council functions to a campus of purpose built offices at Orchardbank Business Park in Forfar.)
3.5 Table 2 illustrates how long the total employment land supply shown in Table 1 would meet demand at recent take up rates. TAYplan requires LDPs to identify at least 5 years supply of employment land. The take up of employment land between 2006/7 and 2010/11 in each of the principal settlements is shown in Column 1 and taken from the Angus Council’s Annual Survey of Employment Land. Annual take up of employment land in Angus is historically low, but is normally two to three hectares per annum or, about double the current rate.

<table>
<thead>
<tr>
<th>Location</th>
<th>5 year take up (2006/07 to 2010/11)</th>
<th>Established Land Supply</th>
<th>ALPR Allocated Sites</th>
<th>Total Years Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arbroath</td>
<td>2.76</td>
<td>21</td>
<td>40</td>
<td>61</td>
</tr>
<tr>
<td>Forfar</td>
<td>1.05</td>
<td>109</td>
<td>19</td>
<td>129</td>
</tr>
<tr>
<td>Montrose</td>
<td>2.65</td>
<td>19</td>
<td>19</td>
<td>38</td>
</tr>
<tr>
<td>Brechin</td>
<td>0.55</td>
<td>66</td>
<td>0</td>
<td>66</td>
</tr>
<tr>
<td>Carnoustie</td>
<td>0.19</td>
<td>9</td>
<td>395</td>
<td>405</td>
</tr>
<tr>
<td>Kirriemuir</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Monifieth</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Angus</td>
<td>7.2</td>
<td>37</td>
<td>39</td>
<td>75</td>
</tr>
</tbody>
</table>

Source - Angus Council Employment Land Survey 2011.

3.6 At current take up rates, the principal settlements (with the exception of Monifieth which is part of the Dundee Core Area), there is more than enough employment land available or allocated to provide well in excess of a 5 year supply (Column 4 Total Years Supply). Across Angus, and based on just the last five years, there is a 75 years supply of employment land. Further information on employment land provision can be found in Appendix 2, Principal settlements – Employment Land Summary.

3.7 SPP does not place a specific definition on how much employment land should be allocated in the LDP, but identifies the need for a range and choice of marketable sites and locations, including mixed use, to meet a variety of size and quality requirements from businesses.
3.8 In order to account for variations in economic growth, the previous Development Plan for Angus did not identify employment land allocations based simply on an extrapolation of past demand for land and premises. The demand for employment land has been suppressed by the recent economic downturn which has resulted in an uncharacteristically low take up rate, even by the historically low levels of demand in Angus. For example, taking the highest annual take up rate during the past decade (excluding 2006/7) of around 3.5ha, this would mean a minimum 5 year requirement of 17.5ha for Angus, rather than the 7.2 ha taken up over the last 5 years. Furthermore, a major development on any given site could lead to local shortfalls if the employment land supply reflects only current take up rates.

**Employment Land – Demand**

3.9 The Dundee and Angus Structure Plan recognised that demand for land fluctuated across Angus, costs of servicing land are high and that employment land supply should be monitored and rolled forward. The intention was to provide a constant supply, in accordance with demand whilst facilitating the identification, allocation and servicing of employment land throughout the plan period. For example the Elliot extension in Arbroath was identified in the Angus Local Plan (2000) for a feasibility study, allocated in the ALPR and is now being acquired and serviced for use during the first part of the Angus LDP.

3.10 The allocation of employment land should ensure provision of a range and choice of well located accessible sites capable of meeting the needs of new, incoming and existing businesses to locate and expand. A minimum or limited supply would restrict the range and choice of sites available in Angus for businesses. The current economic downturn will have suppressed demand for land but as business confidence returns there may be an upsurge in demand. Therefore, whilst there may appear to be a significant oversupply of employment land at current take up rates and whilst SPP allows reallocation of employment land, this would not be appropriate as current sites are considered to remain effective and marketable. Furthermore, a single large development could take up a significant part of an allocated site, and flexibility within the supply is required to respond to such an opportunity.

3.11 In accordance with national and strategic planning policy, employment land allocations have focused on the principal towns to capitalise on their role as transport nodes, potential workforce and availability of infrastructure. The location of jobs close to people, services and transport links is central to the concept of sustainable places. New greenfield sites however, are only part of the overall supply of sites and premises for employment uses. Traditional industrial locations (e.g. Lindsay Street/West John Street in Arbroath); town centre offices and the reuse of former farm steadings and buildings for example, enhance the range of locations available for employment uses. Whilst allocated employment land meets only part of the demand for land and premises, it should be able to accommodate a broad range of business activities, particularly those of significant size.

3.12 The allocation and safeguarding of employment land is not an option, but a requirement of SPP and TAYplan therefore options relate to the amount of employment land to be allocated, safeguarded or reviewed and re-allocated for another use.
Option 1: Employment Land (Preferred)

Review current existing employment land supply and identify longer term allocations to maintain the level of supply, allow for planned investment and provide flexibility throughout the plan period to meet emerging employment needs.

Option 2: Employment Land (Alternative)

Maintain current employment land allocation which more than meets the requirements of the TAYplan SDP.

Option 3: Employment Land (Alternative)

Review and reduce employment land allocation to reflect current demand and take-up rates and re-allocate sites no longer considered appropriate or marketable for other uses in accordance with SPP.

Employment Land Use

3.13 The provision of serviced employment land and maintenance of a range of available sites and premises is a major long term commitment. Sites are selected to be attractive to business in terms of location, quality, accessibility and infrastructure capacity. Initial consultations have not suggested that existing sites and allocations are inappropriate. The Council’s Economic Development Division supports the current location of employment sites and allocations, much of which is under their direct management. The slow take up seems to reflect low levels of investment; lack of innovative indigenous business start ups; and low rates of expansion perhaps reflecting the high levels of employment in the primary sector and public services. (Section 3.7 of the Monitoring Report).

Safeguarding of Employment Land

3.14 The established employment land supply and allocations in the ALPR are primarily safeguarded for Class 4 Business, Class 5 General Industrial and Class 6 Storage and Distribution uses – the traditional employment activities on industrial estates and business parks in Angus. Over the period 2000-10, planning applications on these employment sites have primarily been for Classes 5 and 6, with Class 4 Business Uses being distributed throughout the towns, including the town centres.

3.15 TAYplan proposes the safeguarding of areas for Class 4 office type uses within principal settlements. Current ALPR policies allocate or safeguard employment land in general terms and there are no sites specifically identified solely for Class 4 use. There is little history of demand for such activity on safeguarded employment land, as existing Class 4 activity tends to be dispersed throughout the principal settlements rather than concentrated on a particular site. The identification and safeguarding of areas for Class 4 office use is more appropriate to larger centres with specialist areas such as Dundee Technology Park, rather than pattern of distribution across the Angus towns.
3.16 Current policy allows other uses where they are ‘small scale, complementary and ancillary’. However activities other than Classes 4, 5 and 6 such as car showroom; print works and office supplies; builders’ merchant and children’s nursery have been proposed and in some cases developed on such safeguarded employment land. In order to accommodate additional activities the preferred option is to enhance flexibility on the Business Parks but retain the preference for Use Classes 4, 5 and 6. An alternative option is to allow all but certain specified uses on land safeguarded for employment use.

**Option 1 : Business Parks (Preferred)**

Maximise uptake of sites on business parks by increasing the range of activities permitted, and identifying specific uses which would not be appropriate such as Class 1 Retail and Class 11 Residential Institutions.

**Option 2 : Business Parks (Alternative)**

Maximise uptake of sites on business parks by increasing the range of activities permitted, and identifying specific uses which would be appropriate such as car showrooms.

3.17 Serviced greenfield land may not meet all business needs and brownfield employment sites and premises add to the established supply. The current approach affords some protection to such areas and also identifies opportunity sites for appropriate mixed use or employment activities in addition to allocated employment land. It is proposed this approach be continued in the Angus LDP.

**Diversification of the rural economy**

3.18 Angus is predominantly a rural county ranging from coastal lowlands to upland moors. The rural economy is traditionally based on the natural resources – farming, fishing, forestry and minerals - and this has influenced the character, land use and population distribution across Angus. Although the numbers involved in these primary activities are relatively small, the rural areas remain important to the local economy as sources of wealth and employment, increasingly supplemented by tourism, recreation and energy generation. The rural economy may change over time but the appearance and attractiveness of Angus remains inextricably linked to the primary sector.

**Primary Resources (see also Appendix 3)**

3.19 Farming is the most extensive land use in Angus, with 3627 employees, working occupiers and spouses recorded in the Agricultural Census 2011. Although the number of working occupiers has continued to fall as farms amalgamate, the number of employees has increased significantly reflecting the growth in the production of labour intensive crops such as fruit and vegetables. Many of these workers are temporary and live on site during the season. Businesses and services that support farming are important to the local economy as recognised in TAYplan (see previous section).

3.20 Agricultural activity is generally outwith the scope of the planning system and national and strategic priorities will continue to apply, namely:
• The protection of prime quality agricultural land from inappropriate and irreversible development; and
• Seeking to minimise the impact of land loss required to implement the development strategy, particularly around towns.

3.21 Sporting estates have maintained open heather moorlands over much of the upland plateau and continues to be an important element of the rural economy, providing employment and investment in the remoter parts of the Angus Glens. As this is primarily a matter of land management, the land use planning system has little direct role, unless associated development is required, which will continue be considered within the general context of the Angus LDP.

3.22 Forestry and woodland, whilst less extensive than farming, is still important to the economy and to the character of the rural area. As well as the production and processing of timber, forestry and woodlands provide a major recreational resource and also contribute to biodiversity and landscape quality. The Angus Woodland and Forestry Framework (2011) draws together the recent changes in policy and emerging development opportunities for woodland and forestry in Angus identifying the potential of for new planting in some parts of Angus.

3.23 The major commercial mineral resources in Angus comprise sand and gravel and some hard rock extraction which are essential for construction and primarily serve the local development industry. SPP requires a 10 year land bank of permitted reserves for construction aggregates and TAYplan states LDPs should safeguard a minimum 10 year supply of construction aggregates at all times throughout the plan period. Angus Council undertook a review of mineral development in 2010 and current proposals for extended and new workings together provide at least a 10 year supply, and are anticipated to meet all likely demand within the plan period and beyond.

3.24 There are no significant new land use planning issues relating to primary resources and therefore no requirement to change the general approach currently set out in the ALPR.

Diversification

3.25 Diversification of the rural economy is part of the drive towards a sustainable economy - reducing the need to travel by fostering home/work opportunity and using technology to minimise cost and travel needs. The current policy approach allows proposals to come forward without imposing locational constraint and the preferred option would be to continue this approach with additional guidance to encourage the identification of a wider range of opportunities for conversion, new build and home working throughout the rural area.

3.26 In the larger villages there may be opportunities for a range of small scale commercial or business activities which could support and regenerate the local economy. Opportunity or mixed use sites could accommodate such activity where it is compatible with the site location and surrounding uses but an alternative option would be to identify sites specifically for employment use.
Option 1: Rural Development Opportunity (Preferred)

Continue to facilitate business development opportunities throughout rural Angus where location, use and scale are appropriate.

Option 2: Rural Employment Allocations (Alternative)

In the larger villages, identify sites specifically for employment use.

Tourism and Leisure

3.27 Tourism and leisure is important to the local economy, accounting for 5,100 jobs in Angus in 2008 (Source: VisitScotland). It is one of the sectors identified in the Council’s Economic Development Strategy, taking advantage of Angus high quality environment. The SPP directs commercial leisure uses to town centres but many such activities are extensive land uses and/or not compatible with urban locations for example golf, or action pastimes such as paint balling and quad biking.

3.28 Tourism and leisure development, including accommodation, can provide economic opportunities across Angus and the quality of the environment is particularly important to visitors. It is therefore important to maintain the natural and built heritage, and to support by appropriate visitor facilities and accommodation as promoted in TAYplan.

3.29 In recent years there has been a loss of hotels in Angus, and opportunities for modern or budget hotel facilities identified in the ALPR at Brechin and Forfar in an attempt to capitalise on their proximity to the A90(T) have not stimulated developer interest. For many years proposals for new hotels have been primarily golf related - the Carnoustie Hotel aided the return of the British Open Golf Championship, a new hotel is included in the golf resort proposal at Kingennie and there may be the opportunity to re-instate the hotel at Letham Grange.

3.30 A number of traditional and innovative self-catering developments have developed as an alternative to traditional hotels. These range from luxury country houses and conversions, through large scale chalet resorts to bunkhouses, country cottages and, more recently, ‘ecopods’. These have the capacity to expand the type of accommodation available and to meet the changing visitor demands. Innovative forms of accommodation, however, tend to be small scale, with a relatively small market and can continue to be developed within the context of the rural development approach.

3.31 The Angus LDP will continue to support the appropriate development of facilities and accommodation designed to extend the visitor season and increase visitor numbers. In accordance with TAYplan it will establish policy guidance to ensure developments are well located and of an appropriate standard and scale, whilst protecting the environmental quality of Angus, which is a prime attraction to visitors.
Town Centres and Retailing

3.32 Retailing is an important part of the local economy in terms of employment, provision of local facilities and in supporting the fabric of the town centres. Vibrant town centres attract trade, visitors and investment to the area, and are part of the feeling of prosperity and well being of residents. It also allows people to access goods and services locally and reduces the need to travel. As a focus for public transport they also provide accessible goods and services for those without access to a car. The primacy of the town centres is established in national and strategic policy and the LDP will apply this principle within Angus. A hierarchy of centres will be identified in accordance with SPP and TAYplan. There is no alternative option to this approach.

3.33 Whilst retailing underpins the town centres throughout Angus, there is increasing pressure for shopping at other locations – within and outwith the development boundaries. The sequential test as defined in SPP allows large scale retail development which will not undermine the vitality and viability of defined town centres on sites adjacent to or even outwith the centre where it cannot be accommodated in the town centre. The lack of space within the defined town centres restricts opportunity for large scale retail development however opportunity has arisen on sites adjacent to or outwith the centres to accommodate new retail outlets – primarily supermarkets.

3.34 A number of applications for supermarkets were approved between 2000 and 2010 in Arbroath, Forfar, Kirriemuir, Brechin and Montrose in accordance with the sequential test. This suggests that developer led proposals have the capacity to identify and meet shortfalls in convenience provision. All the Angus towns have at least one supermarket, generally outwith the defined town centre. Whilst supermarket provision has expanded, other in-town retailing has continued to contract (see Appendix 4).

3.35 Attempts to encourage new non-food operators and formats into the Angus towns have met with mixed fortunes. In Forfar and Montrose out of centre sites identified for non-food retailing failed to attract operators, and along with Westway Retail Park in Arbroath subsequent applications for supermarkets have been approved. The edge of centre site at New Wynd in Montrose has been developed for non food retail, but approvals for non-food units in Arbroath town centre and adjacent to the Myre in Forfar have not been implemented. The growth in internet shopping, now estimated at 10.7% of all retail sales (Source - ONS, Feb 2012) is likely to be a factor in future retail investment decisions.

3.36 The current policy approach in the ALPR that of a criteria based approach to accommodating new large scale retail proposals remains the preferred option and should be continued in the Angus LDP. This meets TAYplan requirements and allows a flexible response to demand whilst retaining protection for the town and other centres as appropriate,

3.37 An alternative option would be to undertake a retail capacity study to identify if opportunity exists for further retail development and sites could be identified to improve the attraction of the larger Angus towns as retail centres.
Option 1 : Large Scale Retail Development (Preferred)

Maintain current criteria based approach to large scale retail proposals in accordance with a revised hierarchy of centres.

Option 2 : Large Scale Retail Development (Alternative)

Commission an assessment of current retail provision across Angus to identify any shortfall and allocate and protect sites for defined retail use.

3.38 There is always ‘churn’ within the market which allows new operators to open and sometimes close. The issue is where the quality and choice of shopping declines. As the number of shops in the town centres continues to decline (see Appendix 4), the current function and delineation and core retail areas may no longer be appropriate. As shop vacancies rise, alternative town centre activities can attract people into the towns and support their retail function.

3.39 The biennial Town Centre Health Checks introduced by the Council in 2010 will help inform the development of town centre policy; the assessment of development proposals, and the review of town centre boundaries required to establish a hierarchy of retail centres. The preferred option would be to assess not only the extent of town centres and core retail areas but also to review their form and function to provide an appropriate focus for investment. SPP promotes the development of town centre strategies to enhance town centres in a holistic manner and the Angus LDP could promote the preparation of these in conjunction with other stakeholders as a basis for an enhanced town centre focus.

3.40 An alternative option would be to retain existing town centre boundaries as part of establishing a retail hierarchy and to either strengthen policy to resist change of use from class 1 retail to other uses, or to allow more non-retail uses in order to reduce vacancy levels.

Option 1: Town Centres and Core Retail Areas (Preferred)

Review the extent of the current town centre boundaries and identify the complementary roles of other retail centres. Include a requirement to formulate town centre strategies within the LDP action programme.

Option 2: Town Centres and Core Retail Areas (Alternative)

Retain current Town Centre boundaries as part the definition of the required hierarchy of centres and allow more non-retail uses.

3.41 General stores and post offices in villages have also faced pressures with a number of closures, despite financial support through the council’s Rural Shops and Community Post Office Grant. This reflects social and economic change with increased incomes and mobility allowing access to a wider choice of outlets. The challenge of retaining and attracting rural services will
depend on their ability to attract and retain custom, and a flexible planning approach.

3.42 The Brechin Castle Centre and Angus Gateway near Monifieth have become significant out of town retail locations with associated recreation/visitor facilities. A similar smaller proposal at the former Edzell mart may provide a further retail/visitor outlet. When taken in association with farm shops etc the traditional retail function of the towns and villages may be seen to be further challenged.

Renewable Energy

3.43 The Development Plan (TAYplan and Angus LDP) will continue to support Scottish Government policy and the aspiration to generate the equivalent of 100% of Scotland’s demand for electricity from renewable sources by 2020. The planning system can help deliver renewable energy projects which can provide sustainable, locally generated energy; reduce emissions to achieve targets set in the Climate Change Act; generate jobs and income; and create better heated buildings with reduced running costs.

3.44 Associated opportunities for locally based production and servicing facilities for both onshore and offshore renewable energy production may arise over the plan period and should be supported where appropriate. Montrose Port has been identified in both the National Renewable Infrastructure Plan Stage 2 and the TAYplan SDP as a location with potential to attract and accommodate investment related to the development of offshore wind farms.

3.45 Whilst on-shore wind is currently the focus for development proposals, the role of alternative sources of renewable energy is expected to increase over the plan period and large scale on-shore wind farm development may reach capacity in some areas. The contribution of local biomass heat and power schemes, small scale hydro, and anaerobic digestion provide opportunity for electricity generation, and in conjunction with on-site generation from air and ground source heat pumps and solar/photovoltaic installations will help achieve the target of low or zero-carbon generating technologies as required, in accordance with Section 72 of the Climate Change (Scotland) Act 2009. Furthermore, there may be opportunity to co-ordinate anaerobic digestion technology and disposal of organic waste. This could produce energy, reduce landfill requirements and landfill gases and contribute to the Council’s Zero Waste Strategy in future.

3.46 The capacity of the landscape to accommodate renewable energy development, particularly wind turbines is contentious and is likely to be an area where opposing views are expressed. The role of the Angus LDP will be to balance conflicting interests and to support the development of renewable energy projects which deliver quantifiable environmental and economic benefits and where any significant adverse or cumulative impacts on the natural and built environment, landscape and local communities can be mitigated to an acceptable level.

3.47 There is a well established policy base at national, strategic and local level for the consideration of renewable energy proposals. The ALPR and recently published Implementation Guide for Renewable Energy Proposals support appropriate renewable energy development in accordance with national and strategic policy, with advice from the relevant agencies including SNH,
Historic Scotland, and the MOD. The Scottish Government has recently reaffirmed that spatial frameworks for wind farms over 20MW are to be incorporated in LDPs; there is no viable alternative.

3.48 The Council is undertaking a landscape capacity study in conjunction with SNH and Aberdeenshire Council, which will assist in the development a locational framework for wind energy development. The pattern of wind energy development in Angus is a mix of single, small group and commercial wind farms and SPP permits spatial frameworks to include smaller developments. Given the number and mix of proposals in Angus it would be preferable to broaden the spatial framework to include these smaller projects and to help consideration of local landscape designations. Alternatively the Council could simply address landscape issues raised by larger wind farms.

**Option 1: Locational Framework (Preferred)**

Develop a locational framework for wind energy development across, Angus including windfarms over 20MW.

**Option 2: Locational Framework (Alternative)**

Develop a locational framework for windfarms over 20MW only.

3.49 Renewable energy technologies are developing rapidly; there are a number of technologies available including wind, air and ground source heat pumps, hydro, biomass, photovoltaics and anaerobic digestion. At a domestic level a number of renewable technologies can be installed as permitted development and have the capacity to contribute to reducing emission of greenhouse gases as discussed in the Climate Change Topic Paper.

3.50 The Scottish Government has highlighted opportunities for renewable heat/combined heat and power facilities in rural areas and opportunity exists to encourage and guide renewable energy projects and to actively promote technologies such as renewable heat/combined heat and power in supplementary guidance. Allocation for specific projects within land allocation is an alternative option, but may be superseded or prove a barrier to bringing allocations forward.

**Option 1: Renewable Energy Technologies (Preferred)**

Continue to expand and update interactive supplementary guidance for all forms of renewable energy to assist applicants including a locational framework, and identification of local landscape designations.

**Option 2: Renewable Energy Technologies (Alternative)**

Continue current policies within the new Angus LDP or as supplementary guidance and include heat/combined heat and power facilities within new housing or employment land allocations, where national guidelines are judged capable of being satisfied.
As well as the generation of electricity, the development of transport based on non carbon fuels is an emerging opportunity to reduce emissions and use of fossil fuels. This will be facilitated by the development, production and distribution of biofuels and hydrogen cells which may develop and come forward over the plan period which will be an integral to the development of a low carbon highway network. (See also Infrastructure Topic Paper Para 3.75).

## 4. Issues & Options

A number of issues and options have been raised in Section 3 of this paper which need to be consolidated and more clearly identified for inclusion in the MIR. The main issues should relate to the key changes that have occurred in Angus since the ALPR, and to the Council’s “big ideas” for future development (paragraph 45, Planning Circular 1/2009). Aspects of the ALPR which the Council intends to take forward should be briefly identified. In the context of these requirements, this section establishes the main issues, preferred and/or viable options for development and ALPR policy approaches that could be maintained or slightly amended within the Angus LDP. These are presented in terms of the main topics discussed in section 3 (see bullet points of paragraph 3.1).

### Employment Land Requirements

To meet Policy 3 of the TAYplan Strategic Development Plan (June 2012) the need to identify and safeguard at least 5 years supply of employment land is a primary consideration for the Angus LDP. Therefore, the following is a main issue for sustainable economic development in Angus:

<table>
<thead>
<tr>
<th>How much employment land should be provided, where and with what use restrictions or otherwise?</th>
</tr>
</thead>
</table>

#### Employment Land - Supply

Successive local plans have ensured continuity in the allocation and delivery of serviced employment land in the main Angus towns which is well located in relation to the roads and public transport network and provides a range and choice of locations. This reinforces existing development patterns making best use of infrastructure, transport and population resources. This general approach conforms with SPP and TAYplan and will be continued. The current position in the principal settlements is appended in Appendix 2.

In terms of the allocation and safeguarding of employment land the preferred option is to maintain sufficient employment land to ensure continuity of supply and to address emerging local demand in each of the principal settlements as the economy recovers. This approach also allows investment decisions to progress bringing marketable employment land on-stream to meet emerging demand throughout the plan period.

Given that the established employment land supply in Angus can more than meet the latest five year demand figure throughout the plan period and beyond; current provision could be deemed adequate with an alternative option that no further provision is required. This option, however, does not take account of differing supply and demand across Angus and would not provide flexibility to meet localised demand, a potential upturn in the economy or a more flexible approach to permitted uses.
4.6 SPP and TAYplan allow for the reallocation of employment sites and allocations for alternative uses where there is excess supply and sites are no longer considered to be appropriate or marketable. This option could compromise continuity of supply and lead to the loss of potentially attractive business sites to other uses with less demanding locational requirements. This would significantly reduce the portfolio of sites and premises available to the Council’s Economic Development Division and hence their ability to support and attract businesses.

Employment Land - Demand

4.7 The safeguarding of employment land for certain uses is a long standing practice designed to prevent conflict between incompatible activities; to direct similar uses with similar site requirements to areas developed for that purpose and to attract employment related investment into Angus. The identification and servicing of employment sites is a costly and long term exercise and it has been the practice to protect this investment for Use Classes 4, 5 and 6.

4.8 TAYplan highlights the need to safeguarding employment land within principle settlements to support the growth of the economy and a diverse range of industrial requirements. Allowing a broader range of activities to locate on business parks is the preferred option, whilst continuing to ensure that activities such as retailing or care homes are located on more appropriate sites elsewhere. This approach may encourage take up of employment land making allocated sites more viable to develop, and improving the employment land supply, particularly where current availability is restricted. (See Appendix 2)

4.9 An alternative option is the retention of preference for Class 4, 5 and 6 uses but to increase scope for other specified activities. The retention of a preference with flexibility towards other uses may usefully permit compatible activities while preventing proposals considered inappropriate. This relaxation of control could be reflected in Development Briefs to be prepared for employment sites.

4.10 Additional flexibility may lead to increased relocations and new uses in business parks improving take up rates and supporting the preferred option for the employment land supply. As current sites are developed the requirement for more land could emerge during the plan period and how to fund such infrastructure may raise issues in the future.

Summary of options for employment land provision.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Preferred Option</th>
<th>Reasonable Alternatives</th>
</tr>
</thead>
</table>
| Identify and safeguard at least a 5 year supply of employment land | Review current existing employment land supply and identify longer term allocations to maintain the level of supply, allow for planned investment and provide flexibility throughout the plan period to meet emerging employment needs. | (1) Maintain current employment land allocation which more that meets the requirements of the TAYplan SDP.  
(2) Review and reduce employment land allocation to reflect current demand and take-up rates and re- |
allocate sites no longer considered appropriate or marketable for other uses in accordance with SPP.

| Employment land use | Maximise uptake of sites on business parks by increasing the range of activities permitted, and identifying specific uses which would not be appropriate such as Class 1 Retail and Class 11 Residential Institutions. | Maximise uptake of sites on business parks by increasing the range of activities permitted, and identifying specific uses which would be appropriate such as car showrooms. |

Diversification of the rural economy

4.11 Policy 1 of the TAYplan SDP provides for some development in settlements that are not defined as principal settlements where this can be accommodated and supported by the settlement, and in rural areas. Therefore, the following is a main issue for supporting sustainable economic growth in the rural areas in Angus:

How to provide for appropriate economic development outwith the principal settlements.

4.12 In accordance with TAYplan, the majority of development is focused on the principal settlements. Some development outwith principal settlements can be provided where this can be accommodated and supported by the settlement, and in rural areas, if such development genuinely contributes to the objectives of this Plan and meets specific local needs or supports regeneration of the local economy. The preferred option for economic development in the rural area therefore remains the principle of supporting appropriate development where opportunity arises in suitable locations and through conversion of existing either in the countryside or the larger villages.

4.13 Another approach might be to allocate small sites for employment use in the larger villages. The initial awareness raising exercise did indicate some support for speculative allocations outwith settlement boundaries, with but no developer interest. The Economic Development Division has indicated limited demand for employment sites within the rural area.

4.14 Allocation of employment sites was rejected previously due to lack of public resources to develop them, and a site allocated in Glamis for tourist or business development in the ALPR has now been submitted for an alternative use. Mixed use or opportunity sites could accommodate business development where this is compatible location and adjacent uses without the need for specific allocations for employment use.
Summary of options for economic development outwith the principal settlements.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Preferred Option</th>
<th>Reasonable Alternative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural diversification</td>
<td>Continue to facilitate business development opportunities throughout rural Angus where location, use and scale are appropriate.</td>
<td>In the larger villages, identify sites specifically for employment use.</td>
</tr>
</tbody>
</table>

**Tourism and Leisure**

4.15 Policy 2 of the TAYplan SDP (June 2012) provides for LDPs to identify land to support the year-round role of the tourism sector. As discussed in Paras 3.27-3.31 there is no justification for the Angus LDP to identify or allocate land for tourism related proposals. Proposals within development boundaries are unlikely to raise a strategic issue and countryside recreation projects should be determined on their merits.

**Town Centres and Retailing**

4.16 Policy 7 of the TAYplan SDP (June 2012) makes provision for comparison goods (non-food) retailing to be focused on a hierarchy of centres, the boundaries of which are to be identified in the LDP. The defined town centres will remain the focus for retailing and other town centre activities. Town Centre health checks could contribute to the development of appropriate local strategies. Therefore, the following is a main issue for retail development in Angus

4.17 The **preferred option** is to review town centres and core retail areas to reflect current activities and opportunities to attract investment while retaining retail as their core function. Town centre boundaries would be redefined in light of current circumstances and incorporated into the retail hierarchy. Town centre health checks would help identify change and could also assist the preparation of local strategies in conjunction with other stakeholders.

4.18 An **alternative option** would be to retain existing boundaries as part of establishing a hierarchy of centres. A wider range of uses could be permitted to reduce the number of vacant shops but this would not reflect changing circumstances which are leading to the contraction of town centres in Angus and could even reduce their attraction of the town centres by diluting their core retail function (non-food). This may undermine the retail function which could increase vacancies and the deterioration of the built environment due to lack of investment.

4.19 The primacy of the town centre and its focus for major retail proposals remains key to planning policy at all levels. The sequential test and protecting the vitality and viability of town centres will be continued in accordance with this national and strategic policy. Large–scale retail developments may
require sites outwith the defined centres and the **preferred option** is to allow such proposals where they accord with the sequential test and can demonstrate vitality and viability of town centres will not be unacceptably affected.

4.20 The **alternative option** of allocating sites for retail use is not considered viable. The current economic climate and rise in on-line retailing indicate continuing pressures on small towns and traditional high streets and any future land allocations are likely to be a long-term commitment. Opportunity identified in the Angus Retail Study (2001) did not materialise as forecast and conditions are even more uncertain now which would suggest site allocations whilst removing some uncertainty seem unlikely to be developed as proposed. Recent experience in the three main towns demonstrates this, with sites for approved or allocated for comparison retailing subsequently re-submitted as food stores.

**Summary of options for town and other centres in Angus.**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Preferred Option</th>
<th>Reasonable Alternatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Centres and Retailing - large scale retail development</td>
<td>Maintain current criteria based to approach to large scale retail proposals in accordance with a revised hierarchy of centres.</td>
<td>Commission study of current retail provision and demand across Angus to identify any shortfall and allocate and protect sites for defined retail use.</td>
</tr>
<tr>
<td>Town Centres and Retailing - town centres</td>
<td>Review the extent of the current town centre boundaries and identify the complementary roles of other retail centres. Include a requirement to formulate town centre strategies within the LDP action programme.</td>
<td>Retain current town centre boundaries as part the definition of the required hierarchy of centres and allow more non-retail uses.</td>
</tr>
</tbody>
</table>

**Renewable Energy**

4.21 Renewable energy development has become an increasingly important sector in terms of government targets and the number and type of projects coming forward in Angus. The importance attached to renewable energy generation is evident in the legislation and advice published by the Scottish Government and various agencies such as Scottish Natural Heritage (SNH) and SEPA. The policy approach to renewable energy in Angus has evolved taking account of this guidance.

**How should the Angus LDP support all types of renewable energy development across the area?**

4.22 The ALPR supports the development of a broad range of renewable energy technologies which accords with TAYplan SDP, SPP and related Specific Advice Sheets. National policy and guidance make clear that a detailed policy framework for all types of renewable energy should be contained within the LDP. The policy will be revised in light of this but the established principle of
encouraging renewable energy development in appropriate locations will continue.

4.23 The recently published Implementation Guide for policies ER 34: Renewable Energy Development and ER 35: Wind Energy Development of the ALPR will form the basis for future supplementary guidance to accompany the Angus LDP in order to address matters of detail and guidance for this major development activity. The implications of off-shore wind energy development may also require to be addressed to harmonise both on and off-shore proposals.

4.24 The critical issues are likely to relate to landscape capacity and cumulative impact as the number of proposed projects increase, and that a spatial framework for windfarms must be incorporated in the LDP. The Council, in conjunction with SNH and Aberdeenshire Council, is undertaking a landscape capacity study to inform the spatial framework. The preferred option is that this should address different scales of turbine development; potential cumulative impact of all wind energy schemes and how they interrelate. The alternative option of considering only proposals over 20WM would not address the issues raised by the mix of sizes and scales wind energy proposals being experienced in Angus. The spatial framework should inform both policy and supplementary guidance.

Summary of options for renewable energy development.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Preferred Option</th>
<th>Reasonable Alternatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewable Energy Development - wind energy</td>
<td>Develop a locational framework for wind energy development across, Angus including windfarms over 20MW.</td>
<td>Develop a locational framework for windfarms over 20MW only.</td>
</tr>
<tr>
<td>Renewable Energy Development - encourage renewable energy projects</td>
<td>Continue to expand and update interactive supplementary guidance for all forms of renewable energy to assist applicants including a locational framework, and identification of local landscape designations</td>
<td>Continue current policies within the new LDP or as supplementary guidance and include heat/combined heat and power facilities within new housing or employment land allocations, where national guidelines are judged capable of being satisfied.</td>
</tr>
</tbody>
</table>
Appendix 1 – Background Information

**Area**
220,415ha/2204 sq km
32399ha within the Cairngorms’ National Park

**Population**
2010 Estimate 110,570 (GROS mid year population estimate)

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
<th>2028</th>
<th>2033</th>
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</thead>
<tbody>
<tr>
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<td>5271000</td>
<td>5359800</td>
<td>5442300</td>
<td>5505300</td>
<td>5544400</td>
</tr>
<tr>
<td>Angus</td>
<td>110300</td>
<td>112400</td>
<td>114300</td>
<td>116200</td>
<td>117800</td>
<td>118800</td>
</tr>
<tr>
<td>Dundee</td>
<td>142500</td>
<td>142700</td>
<td>141600</td>
<td>140100</td>
<td>137900</td>
<td>135200</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>144200</td>
<td>152100</td>
<td>159700</td>
<td>167700</td>
<td>175600</td>
<td>182900</td>
</tr>
<tr>
<td>Tayside</td>
<td>397000</td>
<td>407200</td>
<td>415600</td>
<td>424000</td>
<td>431300</td>
<td>436900</td>
</tr>
</tbody>
</table>

GRO(s) Projection

**Car ownership 2001**

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<thead>
<tr>
<th></th>
<th>No car/van</th>
<th>One cars/vans</th>
<th>Two cars/vans</th>
<th>Three cars/vans</th>
<th>Four or more cars/vans</th>
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</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>34.23</td>
<td>43.35</td>
<td>18.62</td>
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<td>0.82</td>
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<tr>
<td>Angus</td>
<td>26.43</td>
<td>46.47</td>
<td>21.84</td>
<td>3.96</td>
<td>1.31</td>
</tr>
<tr>
<td>Arbroath E &amp; Lunan</td>
<td>39.87</td>
<td>41.69</td>
<td>14.75</td>
<td>2.65</td>
<td>1.04</td>
</tr>
<tr>
<td>Arbroath W &amp; Letham</td>
<td>25.08</td>
<td>48.73</td>
<td>21.24</td>
<td>3.51</td>
<td>1.45</td>
</tr>
<tr>
<td>Brechin &amp; Edzell</td>
<td>24.36</td>
<td>47.54</td>
<td>22.53</td>
<td>4.44</td>
<td>1.13</td>
</tr>
<tr>
<td>Carnoustie &amp; District</td>
<td>19.55</td>
<td>47.02</td>
<td>26.68</td>
<td>5.32</td>
<td>1.45</td>
</tr>
<tr>
<td>Forfar &amp; district</td>
<td>29.05</td>
<td>48.45</td>
<td>18.22</td>
<td>3.19</td>
<td>1</td>
</tr>
<tr>
<td>Kirriemuir &amp; Dean</td>
<td>18.99</td>
<td>46.19</td>
<td>26.9</td>
<td>5.75</td>
<td>2.16</td>
</tr>
<tr>
<td>Monifieth &amp; Sidlaw</td>
<td>15.46</td>
<td>45.27</td>
<td>32.07</td>
<td>5.43</td>
<td>1.77</td>
</tr>
<tr>
<td>Montrose &amp; District</td>
<td>32.89</td>
<td>47.16</td>
<td>16.55</td>
<td>2.62</td>
<td>0.78</td>
</tr>
</tbody>
</table>

Source: 2001 Census of Population

**Incomes**

Average Gross Weekly Earnings 2011 (by residence)

<table>
<thead>
<tr>
<th>Gross weekly pay (£s)</th>
<th>Angus</th>
<th>Scotland</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time workers</td>
<td>458.4</td>
<td>490.6</td>
<td>503.1</td>
</tr>
<tr>
<td>Male full-time workers</td>
<td>500.2</td>
<td>519.8</td>
<td>541.7</td>
</tr>
</tbody>
</table>
Average Gross Weekly Earnings 2011 (by workplace)

<table>
<thead>
<tr>
<th>Gross weekly pay (£s)</th>
<th>Angus</th>
<th>Scotland</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time workers</td>
<td>417.7</td>
<td>488.8</td>
<td>502.6</td>
</tr>
<tr>
<td>Male full-time workers</td>
<td>423.1</td>
<td>517.8</td>
<td>540.9</td>
</tr>
<tr>
<td>Female full-time workers</td>
<td>388.6</td>
<td>440.8</td>
<td>445.7</td>
</tr>
</tbody>
</table>

Source: ONS annual survey of hours and earnings - resident analysis
Median earnings in pounds for employees working in the area

Unemployment

<table>
<thead>
<tr>
<th></th>
<th>May 2012</th>
<th>Jan 2012</th>
<th>Sep 2011</th>
<th>May 2011</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

ONS – Unemployment Rate (Claimant Count)
Appendix 2 - Employment Land Summary for Principal Settlements

1 Arbroath – tier 2 settlement
   • Safeguarded employment land at Kirkton and Elliot provides 11.45ha land which is currently available for development
   • Elliot extension being progressed will add 12.2 ha within the plan period.
   • 5 year take up – 2.76ha.
   • The allocated and existing sites provide sufficient land to meet TAYplan requirements and provide a range of greenfield sites.

The development of part of the employment land allocated as an extension to the Elliot Business Park is anticipated to provide sufficient additional greenfield land to meet demand over the plan period.

2 Forfar – tier 2 settlement
   • Safeguarded employment land at Orchard Bank Business Park provides 23ha land which is currently available for development, although ground conditions will restrict activities in some parts.
   • Allocation at Carseview Road 4 ha in the longer term
   • Orchardbank Gateway is identified in TAYplan as a Strategic Development Area
   • The potential of agricultural sector in Forfar is recognised in its designation as a strategic development Area
   • 5 year take up – 1.05ha
   • The allocated and existing sites provide sufficient land to meet TAYplan requirements and provide a range of greenfield sites.

The majority of land at Orchardbank Gateway remains available for development and the allocation at Carseview remains an opportunity to diversify supply. Recent investment at Forfar mart has reinforced this location as central to the town’s role as an agricultural service centre.

3 Montrose – tier 2 settlement
   • Safeguarded employment land at Broomfield and Forties Road provide 10.35ha land which is currently available for development
   • Allocation at Broomfield 10 ha in the longer term
   • 5 year take up – 2.65ha
   • The allocated and existing sites provide sufficient land to meet TAYplan requirements and provide a choice of sites

Much of the available land is in private ownership and comprises mainly small dispersed parcels of land. There is potential to extend at Broomfield, but opportunity also exists at the harbour and at Forties Road to attract employment uses. The relationship of Montrose with the oil and gas sector may extend to offshore renewables. Recent announcements of further investment in all aspects of the North Sea energy sector and inclusion of Montrose in the National Renewable Infrastructure Plan validates the findings of the South Montrose Study and the TAYplan allocation of Montrose Harbour as a Strategic Development Area with potential to capitalise on planned future investment.

4 Brechin – tier 3 settlement
   • Safeguarded employment land at Brechin Business Park and Montrose Road provide 7.68ha land which is currently available for development
   • 5 year take up – 2.76ha
• The allocated and existing sites provide sufficient land to meet TAYplan requirements and provide a range of greenfield sites.

Existing sites provide sufficient land at past take up rates, but there is interest in a number of sites within the Business Park. This would reduce supply to below anticipated demand should they progress to development. Ground conditions may also reduce development capacity on part of the Brechin Park, reducing the available land supply.

5 Carnoustie – tier 3 settlement
• Safeguarded employment land at Panmure provides 0.38ha land which is currently available for development
• There is an allocation of 15ha at the Carlogie Business Park.
• 5 year take up – 0.19 ha
• The allocated and existing sites provide sufficient land to meet TAYplan requirements and can provide a range of greenfield sites.

The current land allocation is limited in terms of quantity, quality and choice. The low take-up rate may reflect lack of suitable sites available for development. An outline planning application has been submitted but not yet determined for the development of the Carlogie Business Park.

6 Kirriemuir – tier 3 settlement
• Safeguarded employment land at Muirhead provides 0.38ha land which is currently available for development
• There is an allocation of 4ha at the East Muirhead of Logie.
• 5 year take up – 0
• The allocated and existing sites provide sufficient land to meet TAYplan requirements and can provide a greenfield sites.

The current land supply is limited in terms of quantity, quality and choice. The low take-up rate may reflect lack of suitable sites available for development. There is outline planning permission for mixed industrial development at Muirhead of Logie and a PAN for similar use is pending.

7 Monifieth. – within Dundee Core Area
• No safeguarded or allocated employment land

Monifieth is included within a tier 1 settlement and does not therefore have a TAYplan employment land allocation in its own right. It has evolved as a commuter settlement and industrial and business premises have been redeveloped for residential use. It is difficult to know if demand is curtailed by lack of opportunity or vice versa.
Appendix 3 - Rural Resources

Angus if a primarily rural area and the contribution of agricultures, forestry and woodland and minerals should not be underestimated. They are the major land uses providing direct employment and income, as well as supporting a wide range of other economic activity – such as processing (food and drink), engineering and tourism. Much of primary sector activity and controls are outwith the remit of the LDP, but it creates the rural landscape and maintains the quality of the wider environment which influences the lives of all Angus residents.

Agriculture
- Estimated to contribute 9% of Angus GDP
- 2.8% of Scotland’s land area
- 3% of Scotland’s agricultural land (188000ha)
- 10% of Scotland’s prime quality agricultural land
- 40% of Scotland’s Class 1 agricultural land

Angus produces around:
- 10% of Scotland’s cereals (barley, wheat and oilseeds) production;
- 30% of Scottish production of potatoes
- 30% of Scottish production vegetables for human consumption;
- 25% of Scottish soft fruit production

Between 2001 and 2010 there was
- A 0.5% reduction in total agricultural land
- A reduction in livestock ranging from 10% for cattle to 32% for pigs
- An increase in fruit and vegetable production
- Large increases in bare fallow and grassland

Between 2001 and 2010 there was a
- 10% decline in working occupies
- 2% increase in working spouses
- 58% increase in employees

Forestry and woodland
- 10% of Angus is currently woodland
- 17% of Scotland is currently woodland
- circa 75,000 tonnes of timber, mainly small round wood, is exported from Montrose Port annually

Minerals
- 13 working quarries, 6 hard rock aggregate, 2 dimension stone products and 5 sand and gravel
- Sand and gravel reserves - estimated 1.450 million tonnes
- Minerals Audit 2010 indicated 10 year land bank requirement for hard rock and sand and gravel was met, with further applications in progress.
Convenience Retailing

- Floorspace has contracted in all the defined town centres except Montrose.
- Out of centre floorspace has increased in all town except Monifieth
- The larger towns have much higher levels of out of centre floorspace reflecting their role as larger centres
- The smaller towns meet mainly local needs with floorspace still focused on the town centres
- The larger centres draw in the expenditure needed to maintain current levels of supermarkets provision
- Generally, total floorspace increased in the larger towns and declined in the smaller ones, with the exception of Brechin.

Town Centre - convenience (sqm gross)

Out of centre - Convenience Floorspace (sqm gross)

Total Convenience Floorspace (sqm gross)
Comparison Retailing

- Floorspace has contracted in all the defined town centres except Monifieth.
- Out of centre floorspace has increased in the larger towns
- The three main towns have much higher total floorspace reflecting their role as larger centres
- The smaller towns meet mainly local needs with floorspace still focused on the town centres
- The larger centres draw in the expenditure needed to maintain current levels of supermarkets provision
- Generally, total floorspace decreased overall, with the exception of Monifieth.