

From: [REDACTED]
[REDACTED] 16 May 2013 16:17
To: [REDACTED]
Subject: LDP-340-1 - Perth & Kinross Local Development Plan

Attachments: Questions on roads and strategic sites.pdf; Contact Details of Participants to Hearing.pdf

Dear Brenda

**PERTH AND KINROSS PROPOSED LOCAL DEVELOPMENT PLAN
THE TOWN AND COUNTRY PLANNING (DEVELOPMENT PLANNING)
(SCOTLAND) REGULATIONS 2008
ISSUES – 20d EFFECTIVENESS OF STRATEGIC SITES, 21 PERTH
STRATEGIC DEVELOPMENT AREA – WEST/NORTH WEST PERTH & 24
PERTH AREA (WITHIN CORE) TRANSPORT INFRASTRUCTURE**

The reporters appointed by Scottish Ministers to examine the unresolved issues in respect of the above local development plan, have decided that they require further information in relation to the above issues.

They have, therefore, decided to request the submission of a written statement from the planning authority and a number of representors, in response to a series of questions. The questions and list of representors who have been invited to respond are set out in the attached annex. Please note that representors may only answer those questions to which they have been invited to respond, as specified in the attached annex.

The written statement should be as concise as possible and must not exceed 500 words for each answer. You are asked to submit your written statement to this office and to the representors listed by 5 pm on Friday 14 June 2013.

If your statement relies on material contained in any other document, you should enclose a copy of that document, or preferably of the relevant extract. A list of any such documents should also be provided at the same time.

If the reporter thinks it would be helpful to explore further the written statements provided, the parties in the attached list may be invited to attend a hearing session on Thursday 25 July 2013 at 10 am at North Inch Community Campus.

If a hearing session does take place, it will not necessarily consider all of the questions, as the reporter may have sufficient information from the written statements. Confirmation of whether or not a hearing session will take place, which questions it will consider and who will be invited will be sent to you as soon as possible after the further written statements have been received. The reporter expects the planning authority to take part in any hearing session.

All the written statements received shall be made available for viewing on the DPEA website:

<http://www.dpea.scotland.gov.uk/CaseDetails.aspx?id=qA341253>

Please do not hesitate to contact me if there is anything you would like to clarify.

Yours faithfully

[Redacted]



Questions on roads
and strateg...



Contact Details of
Participant...

[Redacted]

Development Plan Assistant

The Scottish Government
Directorate for Planning and Environmental Appeals
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FK1 1XR

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<http://www.scotland.gov.uk/Topics/Built-Environment/planning/Appeals/whatwedo/devplanexaminations>

Perth and Kinross Local Development Plan examination**Perth area housing sites and road issues – request for further submissions****Issue 20d The Effectiveness of Strategic Sites;
Issue 21 Perth Strategic Development Area; and
Issue 24 Perth Area (within core) Transport Infrastructure**

The reporter has a series of questions, which require to be addressed before he can conclude his examination of the above issues. The planning authority is invited to respond to all of these. Other parties should only respond where invited to do so, as set out in the table below.

	Interested party	Question(s) to address
1	Perth and Kinross Council	All
2	Scottish Government	6, 10, 11, 12, 25, 26, 27, 30, 31
3	A Ritchie & Son and M & S M Bullough (c/o Strutt & Parker)	6, 7, 9, 15, 19, 20, 21, 22, 24, 25, 26, 27, 28, 29, 30
4	Stewart Milne Homes Ltd (c/o Emac Planning)	6, 7, 14, 15
5	Scone Palace and Estates (c/o Smiths Gore)	6, 7, 14, 15
6	A & J Stephen Ltd (c/o Emac Planning)	6, 7, 14, 15
7	TACTRAN	2, 3, 4, 6, 8, 11, 15
8	Stewart Milne Homes (c/o Ryden LLP)	6, 7, 21, 22, 23
9	Zurich Assurance Ltd (c/o Bidwells)	3, 4, 6, 7, 8, 9, 12, 13
10	Springfield Properties Ltd (c/o Grant & Geoghegan)	6, 7, 13, 17, 21, 22
11	The Pilkington Trust (c/o Savills)	6, 7, 9, 13, 16, 17, 18, 19, 20, 21, 22, 23, 25, 26, 27, 28
12	John Dewar Lamberkin Trust (c/o Ristol)	6, 7, 9, 16, 18, 19, 20, 21, 25, 26, 27, 28, 30
13	The Muir Group (c/o Lochhead Consultancy)	6, 7, 9, 16, 18, 19, 20, 21, 25, 26, 27, 28, 30

14	CKD Galbraith	9, 18, 19, 20, 21, 25, 26, 27, 28, 30
15	GS Brown Construction Ltd	6, 7, 9, 13, 16, 17, 18, 19, 20, 21, 22, 23, 25, 26, 27, 28

Responses should be as brief as possible and must not exceed 500 words per question.

The Questions

Cross Tay Link Road (CTLR) status

1. What is the status of the CTLR in the proposed local development plan? Is it a proposal?
2. What status does the CTLR have in the Regional Transport Strategy?

CTLR funding

3. In the November 2012 draft supplementary guidance “Developer Contributions Transport Infrastructure” (Schedule 4 Document 446) the cost of the CTLR is estimated to be £90 M. Is this still considered to be an accurate and up to date figure and how has it been calculated when many design details (such as the river, A9 and railway crossing) are at this stage unknown?
4. Given the authority’s acknowledgement (in Shaping Perth’s Transport Future (Core Document 21, page 16)) that the CTLR would not reduce traffic in the city centre unless city centre improvements (the “City Improvements Package”) were also undertaken, should the cost of such works be added to the £90 M? A figure of £23 M is identified for “public transport, city centre improvements, walking and cycling” (Schedule 4 Document 446). Does this figure relate to the “City Improvements Package”?
5. Does the cost estimate for the CTLR include the section through Bertha Park (Site H7) and the link to the A9/A85 junction?
6. Paragraph 2.7 of Schedule 4 Document 446 estimates that 40% of the overall transport infrastructure costs can be met from “other funding mechanisms including working with government bodies to bring forward funding.” What is the basis for this confidence and what specific mechanisms are anticipated? Does the absence of any commitment to CTLR in the Strategic Transport Projects Review (STPR) indicate that this project is regarded as one of local rather than strategic importance and does this has implications for access to government funding? What confidence is there in the ability of the development industry to fund the other 60% of the overall transport infrastructure costs over the next 30 years?

7. The authority expects to recoup from developers, at least some of the £15 M it appears to be willing to commit to funding the A9/A85 junction improvements (ref Schedule 4 Document 452 Committee Report). As this would be drawn from the same funding source as the funding for the CTLR (contributions from developers in the Perth area), when considering the availability of developer funding for the CTLR and the scale of any shortfall, should this be factored into the estimates?

CTLR impact

8. With reference to the Perth Traffic and Transport Issues Transport Appraisal 2010 and any other evidence, explain the extent to which the CTLR will affect traffic levels in central Perth. This question is prompted by the claim that the CTLR will not significantly alter travel patterns. (Bidwells for Zurich Assurance Ltd 08816/7/001).
9. Did the modelling work that informed the CTLR process in the Perth Traffic and Transport Issues Transport Appraisal 2010 take account of site H70 being developed? If not, is the impact of the CTLR likely to be any different now that H70 is proposed?
10. Is Transport Scotland's only concern with the CTLR to ensure a 1 km junction separation from the Inveralmond junction?
11. In Core Document 202 "Strategic Transport Projects Review Report 1: Review of Current and Future Network Performance: 6 Performance of the Strategic Nodes" (2008) it appears that the strategic road network around Perth operates reasonably well and that there is not forecast to be significant increases in road congestion. Is this correct? Does this take account of planned increases in the size of Perth? (there is reference to new housing planned for Perth on para 6.2.10).
12. What is known at this stage of the archaeological investigation and landscape impact mitigation works that will be required for the proposed CTLR route? What cost and timing implications might these have?

CTLR delivery

13. What is the latest estimate of the completion date for the CTLR?
14. Is the proposed embargo on further green field planning consents for housing on sites of 10 or more until the CTLR is a committed project, intended to apply to the proposed housing site allocations in settlements to the east/north east of Perth? Or is it intended to relate only to windfall development in these locations?
15. Was any modelling work undertaken to determine the additional traffic impact in Perth City centre that could be expected to arise from housing development in locations that are subject to the embargo?

A9/A85 Issues

- 16.** Has the council actually committed to forward fund the A9/A85 junction improvements? This is not entirely clear from Schedule 4 Document 452 (Committee Report) despite what is said in the authority's response to Issue 20d.
- 17.** Does the cost estimate for the A9/A85 junction improvement include the provision of a link road into site H7? If not, what additional cost would this entail if undertaken as part of that project rather than as part of the CTRLR?
- 18.** In the Main Issues Report (MIR – Core Document 95)), the Perth West site (now Site H70) was not as extensive as is now proposed - it did not include land adjacent to the A85. Why was this?
- 19.** In the MIR (page 80) it is stated that preliminary investigation suggests that the A9/A85 could not support both Almond Valley Village and Perth West. This suggests that some traffic modelling of Perth West had been carried out. What assumptions as to the means of access to Perth West informed this finding?
- 20.** If development on H70 were split into northern and southern phases with only the former using the A9/A85 junction, is there any reason to think that the impact of developing that northern phase with a similar number of houses to Almond Valley Village would have any worse impact on the trunk road network than was predicted for the Almond Valley Village scheme?
- 21.** Has any modelling work been carried out to assess the likely implications for the A9/A85 junction of the following scenarios:
 - i. developing Almond Valley Village in conjunction with a proportion of site H70? (There is reference to an additional cost of £11 M for a redesign of the A9/A85 junction upgrade in representation 09086/1);
 - ii. developing Almond Valley Village in conjunction with a proportion of site H7 (accessed via a link to the A9/A85 junction in advance of CTRLR completion)?
- 22.** Could any part of H7 could come forward before the CTRLR using the existing access? On what basis does Springfield contend that the existing access could be used for an initial phase of approximately 300 units?
- 23.** The plan assumes that 750 units can be delivered on H7 by 2024. In what form? This significantly exceeds earlier estimates of the predicted output from this site during the plan period. What is the reason for the change?
- 24.** Grade separation of Inveralmond roundabout is a Strategic Transport Projects Review (STPR) project. What is the latest estimate of timing for this project? What are the implications of the developer / council funded A9/A85 works on the Inveralmond roundabout project? The Perth Traffic and Transport Issues Transport Appraisal 2010 (page 11) suggests that grade separation of Inveralmond would no longer be necessary once the CTRLR and associated

works are in place. Is this correct? If so, might the government funding for Inveralmond grade separation be applied to CTRLR?

A9/Broxden Issues

- 25.** How would the southern H70 access work? From Broxden roundabout? If so, with or without grade separation? Is Transport Scotland content with an access from Broxden?
- 26.** If there is to be an access to the A9 from west of the Broxden roundabout is there any flexibility on the normal minimum 1 km junction separation?
- 27.** H70 was initially discounted as an option because of adverse roads implications. Is this correct? If so, what has changed the authority's mind?
- 28.** The plan assumes that 550 units can be delivered on H70 by 2024. What form would this take and on which road improvements would this depend?
- 29.** Grade separation of Broxden roundabout is a STPR project. What is latest estimate of timing? The TAYplan action plan says "*The funding and delivery of works at Broxden and Inveralmond roundabouts at Perth have not yet been confirmed.*" Is that still the case?
- 30.** For the southern half of H70 there is an offer from the developer (in Appendix 2 to representation 09166/16) to provide two left turn slip roads on the Broxden roundabout. Would this be unnecessary if grade separation is to take place? If so, would other works/contribution be appropriate in order to ensure "no net detriment"?
- 31.** What is the nature of Transport Scotland's current study on the A9 between Kier roundabout and Luncarty due to report in June, and what implications might this have for the proposed western expansion of Perth?

PERTH AND KINROSS PROPOSED LOCAL PLAN EXAMINATION
CONTACT DETAILS FOR PARTIES TAKING PART IN HEARING SESSION

ON 25 JULY 2013

AT NORTH INCH COMMUNITY CAMPUS @ 10am

Representee	Contact Name & Address
Perth & Kinross Council	<p>[REDACTED] Planning & Regeneration Perth & Kinross Council Pullar House 35 Kinnoull Street PERTH PH1 5GD [REDACTED]</p>
Scottish Government (00092)	<p>[REDACTED] 2-H Bridge Victoria Quay EDINBURGH EH6 6QQ [REDACTED]</p>
A Ritchie & Son and M & S M Bulloch (08651)	<p>[REDACTED] Strutt & Parker 28 Melville Street EDINBURGH EH3 7HA [REDACTED]</p>
Stewart Milne Homes Ltd (09029) A & J Stephen Ltd (09727)	<p>[REDACTED] Emac Planning LLP Ballinard House 3 Davidson Street BROUGHTY FERRY DD5 3AS [REDACTED]</p>
Scone Palace & Estates (09163)	<p>[REDACTED] Smiths Gore 12 Bernard Street EDINBURGH EH6 6PY [REDACTED]</p>

TACTRAN (09203)	<p>[REDACTED] Bordeaux House 31 Kinnoull Street PERTH PH1 5EN [REDACTED]</p>
Stewart Milne Homes Ltd (00659)	<p>[REDACTED] Ryden LLP 25 Albyn Place ABERDEEN AB10 1YL [REDACTED]</p>
Zurich Assurance Ltd (08816)	<p>[REDACTED] Bidwells 5 Atholl Place PERTH PH1 5NE [REDACTED]</p>
Springfield Properties Ltd (09017)	<p>[REDACTED] Grant & Geoghegan 46 Glenlossie Road ELGIN IV30 8GY [REDACTED]</p>
The Pilkington Trust (09086)	<p>[REDACTED] Savills 163 West George Street GLASGOW G2 2JJ [REDACTED]</p>
John Dewar Lamberkin Trust (09166)	<p>[REDACTED] Ristol Ltd Touch Business Centre Touch Estate Cambusbarron STIRLING FK8 3AQ [REDACTED] m</p>

The Muir Group (07690)	[REDACTED] Millhole Farmhouse MURTHLY PH1 4LG [REDACTED]
CKD Galbraith (09289)	[REDACTED] CKD Galbraith Lynedoch House 31 Barossa Place PERTH PH1 5EP [REDACTED]
G S Brown Construction Ltd (09817)	[REDACTED] G S Brown Construction Ltd The Nurseries St Madoes PERTH PH2 7NF [REDACTED]

From: [REDACTED]
Sent: 02 July 2013 09:24
To: [REDACTED]
Cc: [REDACTED]
Subject: LDP-340-1 - Perth & Kinross Local Development Plan - hearing
Attachments: Hearing session questions.pdf; Contact details for participants to hearing.pdf
Dear All

**PERTH AND KINROSS PROPOSED LOCAL DEVELOPMENT PLAN
THE TOWN AND COUNTRY PLANNING (DEVELOPMENT PLANNING) (SCOTLAND)
REGULATIONS 2008
INVITATION TO PARTICIPATE IN HEARING - ISSUES 20d, 21 AND 24**

Thank you for providing written statements in response to my e-mail of 16 May 2013. Your input proved very helpful to the reporter and he now has sufficient information for the majority of issues. There is only one matter where it would be helpful to the reporter to have further information and for this to be discussed in a short hearing session. This concerns how access to Site H70 from the A9 west of Broxden roundabout might be achieved.

The hearing session will take place on Thursday 25 July 2013 at 10am at the North Inch Community Campus, Gowans Terrace, Perth, PH1 5BF. Only those who are specifically invited to participate in the hearing (confirmed on the attached list) may do so, but all parties are welcome to attend.

The attachment also specifies the matters which the reporter wishes to discuss. It should be noted that no other issues relating to the local development plan will be considered at this hearing. The reporter requires the invited participants to confirm their attendance by 5pm Friday 5 July 2013 and to submit a short written response (no more than 500 words per question) to this office and to the other participants listed by 5pm on Thursday 18 July 2013. The hearing session will provide an opportunity to discuss these responses. When submitting your response please provide the names of those attending the hearing.

If I have not heard from you within the time scales provided, arrangements for the hearing shall progress on the basis of participation by those who have accepted the invitation. You will, however, be welcome to attend the hearing to observe the proceedings.

Please note, that you may ask someone else to speak on your behalf at the

hearing session. However, if you decide to do this, you should let me know the name of the person nominated to represent you when you send me your response.

All responses received shall be made available for viewing on the DPEA website:

<http://www.dpea.scotland.gov.uk/CaseDetails.aspx?id=qA341253>

Please acknowledge receipt of this e-mail.

Regards

[Redacted]



Hearing session questions.pdf ...



Contact details for participan...

[Redacted]

Development Plan Assistant

The Scottish Government
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4 The Courtyard
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<http://www.scotland.gov.uk/Topics/Built-Environment/planning/Appeals/whatwedo/devplanexaminations>

PERTH AND KINROSS PROPOSED LOCAL PLAN EXAMINATION
CONTACT DETAILS FOR PARTIES TAKING PART IN HEARING SESSION

ON 25 JULY 2013

AT NORTH INCH COMMUNITY CAMPUS @ 10am

Representee	Contact Name & Address
Perth & Kinross Council	<p>[REDACTED] Planning & Regeneration Perth & Kinross Council Pullar House 35 Kinnoull Street PERTH PH1 5GD [REDACTED]</p>
Scottish Government (00092)	<p>[REDACTED] 2-H Bridge Victoria Quay EDINBURGH EH6 6QQ [REDACTED]</p>
A Ritchie & Son and M & S M Bulloch (08651)	<p>[REDACTED] Strutt & Parker 28 Melville Street EDINBURGH EH3 7HA [REDACTED]</p>
Stewart Milne Homes Ltd (09029) A & J Stephen Ltd (09727)	<p>[REDACTED] Emac Planning LLP Ballinard House 3 Davidson Street BROUGHTY FERRY DD5 3AS [REDACTED]</p>
Scone Palace & Estates (09163)	<p>[REDACTED] Smiths Gore 12 Bernard Street EDINBURGH EH6 6PY [REDACTED]</p>

TACTRAN (09203)	<p>[REDACTED] Bordeaux House 31 Kinnoull Street PERTH PH1 5EN [REDACTED]</p>
Stewart Milne Homes Ltd (00659)	<p>[REDACTED] Ryden LLP 25 Albyn Place ABERDEEN AB10 1YL [REDACTED]</p>
Zurich Assurance Ltd (08816)	<p>[REDACTED] Bidwells 5 Atholl Place PERTH PH1 5NE [REDACTED]</p>
Springfield Properties Ltd (09017)	<p>[REDACTED] Grant & Geoghegan 46 Glenlossie Road ELGIN IV30 8GY [REDACTED]</p>
The Pilkington Trust (09086)	<p>[REDACTED] Savills 163 West George Street GLASGOW G2 2JJ [REDACTED]</p>
John Dewar Lamberkin Trust (09166)	<p>[REDACTED] Ristol Ltd Touch Business Centre Touch Estate Cambusbarron STIRLING FK8 3AQ [REDACTED]</p>

The Muir Group (07690)	[REDACTED] Millhole Farmhouse MURTHLY PH1 4LG [REDACTED]
CKD Galbraith (09289)	[REDACTED] CKD Galbraith Lynedoch House 31 Barossa Place PERTH PH1 5EP [REDACTED]
G S Brown Construction Ltd (09817)	[REDACTED] G S Brown Construction Ltd The Nurseries St Madoes PERTH PH2 7NF [REDACTED]

PERTH AND KINROSS LOCAL DEVELOPMENT PLAN EXAMINATION

LIST OF CONFIRMED PARTICIPANTS IN HEARING SESSION

ON THURSDAY 25 JULY 2013

AT NORTH INCH COMMUNITY CAMPUS (Lecture Theatre) @ 10am

Representee	Participants
Perth & Kinross Council	Brenda Murray (Development Plan Team Leader) Alex Deans (Transport Planning Manager) Euan McLaughlin (Local Development Plan Planning Officer) Colin Elliot (Solicitor)
Scottish Government (00092) (Transport Scotland)	Laurence Kenney (Transport Scotland) Jason Gillespie (JMP Consultants Ltd) David Torrance (JMP Consultants Ltd)
The Pilkington Trust (09086)	Alastair Wood (Savills) Claire Carr (SKM Colin Buchanan)
John Dewar Lamberkin Trust (09166)	Mark Richardson (Ristol Ltd) Sam Shortt (SSC Transport Consultant)
The Muir Group (07690)	James Lochhead (Lochhead Consultancy) John Muir (Muir Group) Stewart McPhail (Muir Group) Joe Noble (Muir Group)
CKD Galbraith (09289)	Calum Innes
G S Brown Construction Ltd (09817)	Neil Smith

Archibald B (Brian)

From: [REDACTED]
Sent: 14 June 2013 16:49
To: [REDACTED]
Cc: [REDACTED]
Subject: LDP-340-1 PKC Written Submission
Attachments: PKC Response.pdf

**PERTH AND KINROSS PROPOSED LOCAL DEVELOPMENT PLAN
THE TOWN AND COUNTRY PLANNING (DEVELOPMENT PLANNING) (SCOTLAND) REGULATIONS 2008
ISSUES – 20d EFFECTIVENESS OF STRATEGIC SITES, 21 PERTH STRATEGIC DEVELOPMENT AREA –
WEST/NORTH WEST PERTH & 24 PERTH AREA (WITHIN CORE) TRANSPORT INFRASTRUCTURE**

Dear [REDACTED]

Please find attached Perth and Kinross Councils written submissions to the above examination questions. As advised previously the response in relation to question 16 will follow by Wednesday 19 June 2013. Due to the size of the supporting documents these will follow in 3 further emails.

Regards

[REDACTED]

[REDACTED]

Development Plans Team Leader - Planning & Regeneration

The Environment Service
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Website: www.pkc.gov.uk

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This email has been received from an external party and
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Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



Cross Tay Link Road (CTLR) status

1. What is the status of the CTLR in the proposed local development plan? Is it a proposal?

Perth & Kinross Council's Response:

The CTLR corridor of search is included in the LDP reflecting its inclusion in the Regional Transport Strategy and associated delivery plan (AI_06) and TAYplan (AI_05). Whilst the CTLR is fundamental to the delivery of the Plan's strategy it wasn't considered appropriate to identify it as a proposal in the LDP without having the final route determined. It has been included within the LDP Draft Action Programme 2012 – 2024 page 25 (AI_11), and will likely be included as a proposal in the next LDP.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



Cross Tay Link Road (CTLR) status

2. What status does the CTLR have in the Regional Transport Strategy?

Perth & Kinross Council's Response:

The CTLR is recognised as an important link to reduce congestion and improve connectivity both within the Perth area and the wider TACTRAN region. The CTLR is a project within the statutory Regional Transport Strategy's (Core Document 22) associated non-statutory Delivery Plan and is shown as project I2 on page 13 of the associated Action Plan (AI-06). The Regional Transport Strategy received Scottish Ministers approval on 24th June 2008 and was approved by the TACTRAN partnership board at their meeting of 28th October 2008, together with the associated Delivery Plan (AI - 19).

Perth and Kinross Council note and are in full agreement with the response from TACTRAN.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



CTLR funding

3. In the November 2012 draft supplementary guidance “Developer Contributions Transport Infrastructure” (Schedule 4 Document 446) the cost of the CTLR is estimated to be £90 M. Is this still considered to be an accurate and up to date figure and how has it been calculated when many design details (such as the river, A9 and railway crossing) are at this stage unknown?

Perth & Kinross Council's Response:

The Developer Contributions Transport Infrastructure Supplementary Guidance May 2013 (AI_02) provides an update on this figure. The Cross Tay Link Road estimated cost has been revised to £88m. This revision is due to work on the A9/A85 Crieff Road Junction improvements now seeking to extend the road link to Ruthvenfield Road at a cost of £2m which was originally attributed to the CTLR costs.

Costs for the CTLR scheme have been calculated utilising the outline costs of other comparable schemes and standard industry cost estimates. The costs also include an optimism bias of 45% in line with STAG guidance to take account of specific risks and uncertainties associated with the project.

A map of the A9/A85 & CTLR cost breakdown is shown in AI_01.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



CTLR funding

4. Given the authority's acknowledgement (in Shaping Perth's Transport Future (Core Document 21, page 16)) that the CTLR would not reduce traffic in the city centre unless city centre improvements (the "City Improvements Package") were also undertaken, should the cost of such works be added to the £90 M? A figure of £23 M is identified for "public transport, city centre improvements, walking and cycling" (Schedule 4 Document 446). Does this figure relate to the "City Improvements Package"?

Perth & Kinross Council's Response:

The figure of £23M quoted in the document Developer Contributions Transport Infrastructure dated November 2012 (Schedule 4 Document 446) does relate to the City Enhancements Package, but also includes other measures that could be implemented prior to the CTLR scheme becoming fully operational. In essence the objective is to implement a strategy which fulfils a range of criteria and benefits, rather than just a dedicated road scheme.

On page 15 of 'Shaping Perth's Transport Future' (Core Document 21,) it states that 'The provision of a CTLR and removal of traffic travelling through the centre of Perth would provide the opportunity to improve the public transport, walking and cycling networks in and around Perth'. This statement is supported by modelling work that shows that the CTLR will significantly reduce traffic in the city centre, by providing an alternative east-west link for through traffic. While the CTLR will provide immediate relief (a significant reduction in traffic volume unlikely to be achievable by any other methods), the point of the City Enhancements package is to capture that benefit and ultimately discourage traffic volumes from rising again to these levels (levels which currently are a significant factor in Perth being declared an AQMA).

Furthermore the strategy shows a commitment to improving all modes of transport by the application of an integrated approach to addressing Perth's transport problems and ensuring that the greatest possible benefit can be realised by the CTLR by providing these complementary measures to 'lock-in' the benefits gained by the CTLR. Therefore the CTLR and the City Enhancements Package should be seen as separate elements within a wider integrated strategy to tackle the transport issues currently facing the Perth area.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



CTLR funding

5. Does the cost estimate for the CTLR include the section through Bertha Park (Site H7) and the link to the A9/A85 junction?

Perth & Kinross Council's Response:

Yes, the cost estimate for the CTLR does include both the section through Bertha Park Site (Site H7) and the link to the A9/A85 junction. This is all part of an integrated package of measures to improve traffic and transport links in and around Perth. These costs are consistent with the degree of design and analysis commensurate with this stage of the project. Ultimately these costs will be refined as the design process develops.

The attached map (AI-01) provides a cost breakdown of the A9/A85 and CTLR proposals, together with an indication of the proposed route.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



CTLR funding

6. Paragraph 2.7 of Schedule 4 Document 446 estimates that 40% of the overall transport infrastructure costs can be met from “other funding mechanisms including working with government bodies to bring forward funding.” What is the basis for this confidence and what specific mechanisms are anticipated? Does the absence of any commitment to CTLR in the Strategic Transport Projects Review (STPR) indicate that this project is regarded as one of local rather than strategic importance and does this have implications for access to government funding? What confidence is there in the ability of the development industry to fund the other 60% of the overall transport infrastructure costs over the next 30 years?

Perth & Kinross Council’s Response:

The Developer Contributions Transport Infrastructure Supplementary Guidance November 2012 (S4Doc_446) identifies that 40% of the overall transport infrastructure costs will be met from other funding mechanisms. Following a review of the responses to the consultation on this document (S4Doc_446) and the completion of further modelling work, the percentage of the overall transport infrastructure costs which will be met from other funding mechanism has been revised to 44% (Please cross reference to response to Question 7). This is reflected in the Developer Contributions Transport Infrastructure Supplementary Guidance May 2013 (AI_03).

The CTLR is has not been included in the STPR as it does not form part of the trunk road network. The STPR proposal 16 (AI_04) identifies targeted infrastructure improvements to upgrade the A9 from Dunblane to Inverness. This includes a commitment to the full duelling of this route within the STPR period, with the first phase consisting of the grade separation of Broxden and Inveralmond roundabouts. An assessment of the grade separation of Inveralmond roundabout (AI_02) identified that the land acquisition costs would likely exceed over £100m and cause significant disruption to existing businesses. The Council does not consider this to be a practical option.

The infrastructure package identified through the Perth Transport Futures, specifically the A9/A85 Junction upgrade and Cross Tay Link Road, are shown to relieve the problems at Inveralmond roundabout, improve the trunk road network traffic flows while supporting the delivery of the Local Development Plan. The Council have provided AECOM with full details of the modelling work that has been carried out to date with regards to the total infrastructure package to help inform the study being undertaken on behalf of Transport Scotland. The Council is confident that the infrastructure package provides benefits to the Trunk Road network and would provide a significant financial saving to the Scottish Government.

The principle of the CTLR has received Ministerial support. TAYplan, which has been approved by Scottish Ministers, supports the provision of an A9/A94 link through Proposal 1: Map (AI_05). The CTLR is a committed project within the Regional Transport Strategy’s (AI_06) associated delivery plan. The CTLR was submitted for consideration as a national

infrastructure project under NPF 3. While the 'NPF3: Assessment of Proposed National Developments Report April 2013' (AI_07) identified the CTRLR did not meet the criteria to be considered a national project, it recognised that 'there are impacts beyond the region' which gives weight to the Council's position that the CTRLR is of greater than local importance.

Without the transport infrastructure package future development would be constrained and the CTRLR is the significant component in overcoming this constraint. The development industry has not argued that the identified network problems do not exist and no alternative way of solving the issues and supporting future development has been suggested. The Council recognises that the development industry will not fund the entire required infrastructure and acknowledges that this would not meet the tests of Circular 3/2012 Planning Obligations and Good Neighbour Agreements (AI_24). The Transport Infrastructure Developer Contributions (AI_03) identifies the appropriate impact from future development and proportions an appropriate contribution level.

Perth is one of the fastest growing areas of Scotland with the 2011 Census: First Results on Population and Household Estimates for Scotland – Release 1B (Table 2) (AI_08) showing an increase in population of 8.7% 2001 – 2011. This established level of growth provides a strong demand for the completion of residential and commercial developments each of which relies on and will help support the delivery of the required transport infrastructure. To support the delivery of the A9/A85 junction improvements the Council has secured £2.18M from a new supermarket development in Perth (AI_25) subject to this consent being implemented. Accordingly the Council is confident of the ability of the development industry to fund a significant proportion of the 56% of the overall transport infrastructure costs attributed to new development over the next 30 years.

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CTLR funding

7. The authority expects to recoup from developers, at least some of the £15 M it appears to be willing to commit to funding the A9/A85 junction improvements (ref Schedule 4 Document 452 Committee Report). As this would be drawn from the same funding source as the funding for the CTLR (contributions from developers in the Perth area), when considering the availability of developer funding for the CTLR and the scale of any shortfall, should this be factored into the estimates?

Perth & Kinross Council's Response:

It is understood that this question is asking whether the £15M for the A9/A85 junction improvements should be included as part of the overall costs of the CTLR when considering the availability of developer funding.

The entire transport infrastructure package, which includes the A9/A85 Junction, CTLR and the city centre improvements, has a working estimate of £135M. Perth & Kinross Council expects to recoup an appropriate amount of contributions towards the overall transport infrastructure package from new development. Modelling work carried out by SIAS has identified that 56% of overall additional impact on the road network is attributed to new development identified through the LDP. The level of contribution attributed to new development is in line with the additional impact on the road network and has been calculated on £75.6M of the £135M overall cost of the infrastructure package. This package includes the £15M for the A9/A85 Crieff Road Junction improvements but this has been increased to £17M to reflect the extended link road to Ruthvenfield Road which originally formed part of the CTLR and the total for the CTLR amended from £90M to £88M to reflect this change. The remainder of the funding will come from other sources and the Council is in discussions with the Scottish Government to secure funding towards this project.

Due to fluctuations in the development industry over the projected 30 year period in which the contribution levels are calculated, the Council recognises that it may be unable to recoup all of the costs apportioned to new developments but it is confident that a significant proportion of the costs will be met. The principles of the Transport Infrastructure Developer Contributions Supplementary Guidance (AI_03) ensures that the higher the level of development the higher the level of contributions collected by the Council. The Council has secured £2.18M from a new supermarket development (AI_25) in Perth towards the cost of the A9/A85 Junction subject to this consent being implemented.

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CTLR impact

8. With reference to the Perth Traffic and Transport Issues Transport Appraisal 2010 and any other evidence, explain the extent to which the CTLR will affect traffic levels in central Perth. This question is prompted by the claim that the CTLR will not significantly alter travel patterns. (Bidwells for Zurich Assurance Ltd 08816/7/001).

Perth & Kinross Council's Response:

Section 2.3 of the Perth Traffic and Transport Issues Transport Appraisal 2010 entitled Travel Patterns (pages 31-51) states that 2001 Census data shows that there is extensive movement into the city of Perth with the daytime population increasing by 18.94%. From an analysis of both AM and PM peak travel patterns, it was determined that external through trips and cross city trips accounted for 51.6% of all trips in the AM peak and 48.9% of PM trips. Of these external through trips, 41% travel east on the A93/A94/A90. These figures indicate that there is a substantial east-west traffic flow through Perth city centre which when combined with the internal city centre traffic causes congestion at key points on the network such as Bridgend, Atholl Street, Broxden and Inveralmond.

The CTLR is specifically designed to tackle this problem by providing an east-west link between the A9 at Broxden, via the new A9/A85 junction and a link with the A93 before joining the A94 just north of Scone in the vicinity of the Scone Park and Ride roundabout. This will create significant new travel opportunities and will relieve pressure on Bridgend, Atholl Street, Inveralmond and Broxden, whilst significantly reducing the amount of through traffic in the city centre. When combined with the complementary 'City Enhancements' package of walking, cycling and public transport improvements made possible by the reduction of traffic in the city centre, it will have a major impact on travel patterns, both in terms of cross-city movements and city centre movements.

This is borne out by tables 6.3 to 6.6 of the Perth Traffic and Transport Issues Transport Appraisal 2010 on pages 116 and 117 which shows the reduction in traffic on both Perth Bridge and Queens Bridge in both the AM and PM peaks in two modelling scenarios that are outlined on pages 115 and 116.

As an illustration, in table 6.3 the base figure for Perth bridge east bound traffic in the AM peak is 628. In the do-minimum scenario (i.e. without CTLR) the figure rises to 708, a rise of 12.7% or 80 vehicles, whereas under option C (CTLR) the figure reduces significantly to 410, a 34.7% reduction or 218 vehicles.

The modelling work that was carried out and summarised in the document LDP Revised Development Content –Sensitivity Assessment (AI-23) shows significant congestion in the AM peak under the do-minimum scenario (i.e. without the CTLR) and test 10 shows the impact of the CTLR on the City Centre where it can be seen that there is no congestion in the city centre in the AM peak.

Perth and Kinross Council would therefore conclude that the claim by Bidwells in representation 08816/7/001 is unfounded and not backed up by any counter evidence to suggest that the CTRLR will not have a significant effect on travel patterns and traffic volumes in Perth city centre.

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CTLR impact

9. Did the modelling work that informed the CTLR process in the Perth Traffic and Transport Issues Transport Appraisal 2010 take account of site H70 being developed? If not, is the impact of the CTLR likely to be any different now that H70 is proposed?

Perth & Kinross Council's Response:

The initial modelling work did not take account of H70 being developed at this time as it was based on the current Structure Plan and the Main Issues Report for the emerging Local Development Plan. The initial modelling did however show that the CTLR would be needed in order to fulfil the plan. The CTLR programme will provide significant benefits to the network and would be able to accommodate H70 and subsequent modelling work has been undertaken to show how this can be accommodated within the overall transport strategy for Perth.

Document (AI-23) LDP Revised Development Control – Sensitivity Assessment shows the do-minimum scenario which shows that the CTLR is clearly needed and Test 10 shows the positive benefits of the CTLR.

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CTLR impact

10. Is Transport Scotland's only concern with the CTLR to ensure a 1 km junction separation from the Inveralmond junction?

Perth & Kinross Council's Response:

It is Perth and Kinross Council's belief from discussions with Transport Scotland to date, that this is Transport Scotland's main concern.

It is acknowledged that the CTLR will be built in compliance with the current Design Manual for Roads and Bridges (DMRB) standards (core document 184) and Perth and Kinross Council will continue to work closely with our colleagues in Transport Scotland to ensure that all parties are content that the design meets all current standards.

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CTLR impact

11. In Core Document 202 “Strategic Transport Projects Review Report 1: Review of Current and Future Network Performance: 6 Performance of the Strategic Nodes” (2008) it appears that the strategic road network around Perth operates reasonably well and that there is not forecast to be significant increases in road congestion. Is this correct? Does this take account of planned increases in the size of Perth? (there is reference to new housing planned for Perth on para 6.2.10).

Perth & Kinross Council’s Response:

Perth and Kinross Council does not agree that the conclusion that can be drawn from Core Document 202 ‘Strategic Transport Projects Review Report 1: Review of Current and Future Network Performance: 6 Performance of the Strategic Nodes’ (2008) is that the strategic road network around Perth operates reasonably well.

Under paragraph 6.2.4 of core document 202 it states ‘Figure 6.2.3 shows current limitations and constraints on the transport network in and around Perth. Congestion at the M90/A9 Broxden Roundabout and the A9/A912 Inveralmond Roundabout is significant, and arises out of conflict between local access needs and long-distance travel demands between the central belt and the north of Scotland.’

This view is further reinforced in core document 50 (Strategic Transport Projects Review Final Report) as intervention 16 states that dualling of the A9 and grade separation of all roundabouts from Keir roundabout to Inveralmond is a major aspiration of the Scottish Government.

Perth and Kinross Council have also carried out extensive modelling work that shows that both the strategic and local road networks would not function well in future years without the addition of the A9/A85 junction upgrade and CTLR to ensure that the growth aspirations contained within the LDP can be effectively delivered.

There is also a current study being undertaken by consultants AECOM on behalf of Transport Scotland which is looking at options for both Broxden and Inveralmond roundabouts, which are designed to improve traffic flow at these junctions. Perth and Kinross Council have provided AECOM with full details of the modelling work that they have carried out to date with regards to these junctions in order to better inform this study.

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CTLR impact

12. What is known at this stage of the archaeological investigation and landscape impact mitigation works that will be required for the proposed CTLR route? What cost and timing implications might these have?

Perth & Kinross Council's Response:

The main archaeological constraints were identified in the early STAG appraisal (AI_14 section 7.8) and SEA (AI_20), and the subsequent DMRB Stage 1 report (AI_12 section 4.5) and Appendix C (AI_13), with any detailed mitigation works and archaeological surveys to be identified at a later stage of the design process. As part of the EIA for the CTLR (Corridor C) an archaeological desk based assessment and a walkover survey will be carried out. This will identify all known and potential archaeological constraints for the route and will allow a detailed archaeological mitigation plan to be formulated. Until these surveys have been carried out precisely what archaeological mitigation will be required remains unknown. However, as Corridor C passes in close proximity to several scheduled monuments and will impact directly on several non-designated archaeological sites, a programme of archaeological works will be required including widespread archaeological evaluation and archaeological monitoring.

As the setting of several scheduled monuments and Scone Palace designed landscape will be impacted by corridor C there may be some mitigation requirements to lessen the impact of the development on the setting of these sites. The impact on the setting of each monument will be assessed in the EIA. Historic Scotland may also have mitigation requirements regarding setting.

Regarding timing implications, a detailed programme of archaeological works will be formulated and integrated into the project plan. If archaeological remains are discovered a strategy will be formulated to either preserve the remains in situ or by record and there should not be any major delay in carrying this out. However, to avoid possible delays the archaeological mitigation would be carried out at the earliest possible stage. The LDP Draft Action Programme (AI_11) gives a date of 2020 for construction of the CTLR and the next stage in the design process is progressing leaving considerable time to undertake mitigation works.

Again regarding costings, this will be dependent on what archaeology is found during the evaluations and monitoring.

Regarding costings, the archaeological sensitivities of the route corridor were known at the time the indicative costs were prepared. The construction costs for the CTLR ROUTE Corridor C and the associated western edge link through Bertha park are currently £88m (at 2010 prices), this incorporates a value of 45% for Optimism Bias which will cover the range of unknowns at this stage of development

work. These costs are currently being refined as the level of analysis and design progresses.

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CTLR delivery

13. What is the latest estimate of the completion date for the CTLR?

Perth & Kinross Council's Response:

The Draft Action Programme for the Local Development Plan (AI _11, Page 25) indicates the timescale as 2020. It is acknowledged that this date is provisional and at this point in time the Action Programme does not make it explicit whether this is commencement or completion. It is acknowledged that with the significant lead-in time it is unlikely to commence construction before 2020. A projected date of 2020 is also highlighted in the City Plan approved by the Council on 1 May 2013 (AI_27)

The development of the project to the procurement stage will require further design work, statutory consents and potentially a CPO. The provisional estimate for the completion of these processes is 2018. The construction phase is likely to be approximately 2 years. Critically however there is a requirement to ensure a funding package is in place. The Council has acknowledged in the report to the Enterprise & Infrastructure Committee of 7 November 2012 on Transport Infrastructure Developer Contributions that, "this project can not be funded by the Council alone". (AI_26, Page 2 Paragraph 2.5). This was reiterated in the Draft Guidance for consultation appended (AL _26, Page 12 Paragraph 2.7) where it indicated "To meet the costs of the entire infrastructure package the Council will continue to investigate other funding mechanisms including working with government bodies to bring forward funding." The Council is currently in dialogue with Transport Scotland over a potential contribution towards transport infrastructure and is confident that, due to the positive impact the scheme will have on the Trunk Road Network, a compelling case can be made for such a contribution.

Until the funding package is in place the Council is not in a position to provide anything more than an indicative timetable. However the statutory requirement to update the Action Programme at least every two years reflects the Scottish Governments realisation that the detail will change through time and gives the Council the ability to update information as further details emerge.

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CTLR delivery

14. Is the proposed embargo on further green field planning consents for housing on sites of 10 or more until the CTLR is a committed project, intended to apply to the proposed housing site allocations in settlements to the east/north east of Perth? Or is it intended to relate only to windfall development in these locations?

Perth & Kinross Council's Response:

The embargo to the A93 & A94 corridors within the Perth Housing Market Area applies to all developments of 10 units or more including the proposed housing site allocations. The embargo does not apply to development on brownfield sites the majority of which are presumed to have a current or potential impact on the road network out with the control of the land use planning system.

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CTLR delivery

15. Was any modelling work undertaken to determine the additional traffic impact in Perth City centre that could be expected to arise from housing development in locations that are subject to the embargo?

Perth & Kinross Council's Response:

The modelling work looked at the impact of the LDP proposals and committed development on Perth City Centre. This showed that without the CTLR, traffic congestion would reach unacceptable levels and that only 35% of all future and committed development could be accommodated before the current transport system faced gridlock. This situation has in effect already been reached once the effect of existing consents are considered. Based on this evidence, it was decided that an embargo should be put in place for areas where congestion was forecast to be worst in a 'do-minimum' scenario. The do-minimum scenario is clearly demonstrated in supporting document AI-23 LDP Revised Development Content – Sensitivity Assessment which shows the extent of the severe congestion across the network.

This modelling work helped to inform the findings of the Perth Traffic and Transport Issues Transport Appraisal (AI -14) and the development of the Main Issues Report (AI-21). In section 4.6.10 of the Main Issues Report it states 'Analysis of transport patterns in the area predict that if future land-use developments were to occur with no change to the transport network, existing problems would become significantly worse. It is estimated that the current network will only be able to support approximately 35% of the growth in traffic expected as a result of the new Development Plan'.

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A9/A85 issues

17. Does the cost estimate for the A9/A85 junction improvement include the provision of a link road into site H7? If not, what additional cost would this entail if undertaken as part of that project rather than as part of the CTRLR?

Perth & Kinross Council's Response:

The original cost estimate for the A9/A85 junction improvement of £15m including optimism bias did not include the provision of a link road to Ruthvenfield Road, as it was anticipated at this time that the proposed Almond Valley Village proposals would incorporate this link as part of the village expansion. The additional cost of this connection is £2m including optimism bias of 45%.

The cost of connecting from the Ruthvenfield Road into site H7 will be dependent upon the extent to which it penetrates the site however the working estimate suggests £6m including optimism bias. Document (AI-22) provides an illustration of the route of the proposed link road into site H7.

A project board has been set up to carry forward the detailed design work for the A9/A85 junction and the extension into H7 to the potential access point for the new school campus is approximately 800m. Further information on this point is contained in Question 16.

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A9/A85 issues

18. In the Main Issues Report (MIR – Core Document 95)), the Perth West site (now Site H70) was not as extensive as is now proposed - it did not include land adjacent to the A85. Why was this?

Perth & Kinross Council's Response:

The Perth and Kinross Structure Plan Approved 13 June 2003 (AI_15, page 47) advised that “The Perth Area Local Plan will define in detail the inner and outer boundaries” (of the Green Belt) “based on the need to:• allow for long term expansion to the west along the A85 corridor for business uses.....”. The land adjacent to the A85 was therefore identified in the Main Issues Report (AI_16, pages 94 & 95) as an option for business land site B Huntingtower West phase 1 – 5-10ha (Class 4 and compatible development).

In relation to the Perth West site the table at para 5.2.19 of the MIR (site D) indicated that “The site access is dependent upon the provision of a new junction from the A9/A85 and potentially from Broxden and Perth Western Edge” (AI_21). It also identified Perth West for a mixed use development and therefore when the Council decided to identify H70 in the Proposed Plan the entire area (sites B and D in the MIR) was included to ensure the delivery of a sustainable expansion area through a masterplan for the entire site.

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A9/A85 issues

19. In the MIR (page 80) it is stated that preliminary investigation suggests that the A9/A85 could not support both Almond Valley Village and Perth West. This suggests that some traffic modelling of Perth West had been carried out. What assumptions as to the means of access to Perth West informed this finding?

Perth & Kinross Council's Response:

The preliminary modelling work for Almond Valley Village and Perth West focused on the effects of this development traffic on the A9/A85 in the Crieff Road area. Perth West was therefore modelled with only one access onto the A85. The figure of 500 houses was deemed to be equivalent to the employment land that the site was originally earmarked for. At this time there were no clear proposals from all the parties controlling land at Perth West with regards to an access strategy for this site. The modelling work therefore reflected the current Structure Plan at this time.

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A9/A85 issues

20. If development on H70 were split into northern and southern phases with only the former using the A9/A85 junction, is there any reason to think that the impact of developing that northern phase with a similar number of houses to Almond Valley Village would have any worse impact on the trunk road network than was predicted for the Almond Valley Village scheme?

Perth & Kinross Council's Response:

The impact of potentially 1500+ houses served only by an access onto the A85 to the west of the proposed enhanced A9/A85 junction would result in a greater adverse effect on the trunk road network than predicted for the Almond Valley Scheme. The Almond Valley Village scheme has 4 potential access points including a direct link into the upgraded A9/A85 junction and via Ruthvenfield Road and the Inveralmond roundabout as illustrated in document (AI-29). In the longer term a further access would be available through the Berthapark section of the CTRL.

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A9/A85 issues

21. Has any modelling work been carried out to assess the likely implications for the A9/A85 junction of the following scenarios:
 - i. developing Almond Valley Village in conjunction with a proportion of site H70?
(There is reference to an additional cost of £11 M for a redesign of the A9/A85 junction upgrade in representation 09086/1);
 - ii. developing Almond Valley Village in conjunction with a proportion of site H7
(accessed via a link to the A9/A85 junction in advance of CTRLR completion)?

Perth & Kinross Council's Response:

A number of different modelling scenarios have been tested to determine the impact of the proposed LDP proposals on the A9/A85 junction, both in terms of the current junction and the junction upgrade proposals, both pre and post CTRLR. These scenarios and their impacts are summarised in the document LDP Revised Development Content – Sensitivity Report (AI-23).

- i. Modelling was carried out on a scenario showing an Almond Valley Village allocation of 700 units and a proportion of site H70 with 550 houses accessing the network from a priority junction directly onto the A85, both with and without the A9/A85 junction upgrade proposal (tests 5 and 8 in AI-23). It was shown that the A9/A85 junction upgrade would be required to allow this scenario to be accommodated within the road network. The allocation of 550 houses to site H70 was based on an equivalent number of houses for the proposed employment use for this section of the site.
- ii. A scenario involving Almond Valley Village in conjunction with a proportion of site H7 was also tested (tests 2 and 4 in AI-23). The results showed that a first phase of the link road would have to be built within the site, most probably as part of the first phase of the CTRLR connecting into the upgraded A9/A85, for this scenario to be accommodated within the road network.

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A9/A85 issues

22. Could any part of H7 could come forward before the CTRLR using the existing access? On what basis does Springfield contend that the existing access could be used for an initial phase of approximately 300 units?

Perth & Kinross Council's Response:

Perth and Kinross Council do not expect that a viable plan could be put forward for any part of site H7 to be developed using just the existing access and would contend that the site is dependent on the A9/A85 junction upgrade and a link road to this upgraded junction.

If a proposal for 300 units were to come forward on the basis of an upgrading of the existing access, it is our view that this would place an undue burden on an already heavily congested Inveralmond junction. The bridge over the River Almond on Ruthvenfield Road is in a poor state of repair and the spur onto the A9 has been stopped up and it is an unadopted road. Perth and Kinross Council would therefore question the attractiveness of this option for potential house purchasers. It is for these reasons that Perth and Kinross Council would contend that the only way to bring site H7 forward is via the CTRLR proposals.

The developer is understood to agree with this position and supports Perth and Kinross Council's plan to develop the initial phase of the CTRLR into H7.

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A9/A85 issues

23. The plan assumes that 750 units can be delivered on H7 by 2024. In what form? This significantly exceeds earlier estimates of the predicted output from this site during the plan period. What is the reason for the change?

Perth & Kinross Council's Response:

The refusal of the Almond Valley Village planning application prompted a review of all development options which could be effective in helping meet the short term housing land requirement. Perth and Kinross Council is committed to the delivery of the A9/A85 Junction improvements which provides an opportunity for an early access into H7 and it was concluded that this site would be able to effectively deliver a larger volume of housing land during the plan period than previously identified.

The initial confidence in H7 delivering 750 units during the lifetime of the Plan has been further underlined since the publication of the Proposed LDP. Perth and Kinross Council submitted a bid for a new all through school to Phase 3 of the Scotland Schools for the Future programme. On 21 September 2012 the Scottish Government announced that Perth and Kinross had been successful in the bid for the secondary element of a new all through school to the north of Perth to be completed by 2018. Through a review of available development sites H7 was chosen as the most suitable option for the siting of this new school. In order to deliver the Secondary school within the identified timeframe, the Council, through joint working with the developer Springfield Properties Ltd, will provide an access route from the A9/A85 Crieff Road Junction across the River Almond into Bertha Park. Springfield Properties Ltd has identified confidence in the delivery of the site (AI_09) and consultation is ongoing with stakeholders to develop a masterplan. The provision of the new secondary school will provide an anchor use within the site allowing for its early delivery. The form of the development will be determined through the masterplan process, which has started, and will take the form of a phased release with the likely initial phase taking place adjacent to the secondary school.

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A9/A85 issues

24. Grade separation of Inveralmond roundabout is a Strategic Transport Projects Review (STPR) project. What is the latest estimate of timing for this project? What are the implications of the developer / council funded A9/A85 works on the Inveralmond roundabout project? The Perth Traffic and Transport Issues Transport Appraisal 2010 (page 11) suggests that grade separation of Inveralmond would no longer be necessary once the CTRL and associated works are in place. Is this correct? If so, might the government funding for Inveralmond grade separation be applied to CTRL?

Perth & Kinross Council's Response:

Although grade separation of Inveralmond was included in the STPR, the latest statements from Scottish ministers indicate that this is an aspiration. Feasibility work is currently on-going into the options for both Inveralmond and Broxden roundabouts and the A9 in and around Perth.

The current feasibility study being carried out by consultants AECOM is looking at all the options for Inveralmond and takes cognisance of the Council's position that grade separation of Inveralmond would be costly both in terms of land acquisition and highly disruptive to both the strategic and local road networks. Document AI-02 Technical Note - Inveralmond Grade Separation Table 3.1 shows that the land acquisition costs could be as high as £127.6m, which would call into question the viability of any proposed scheme. The options also require major engineering works to be carried out and option 2 in particular would require a significant departure from DMRB standards.

The Council's proposals outlined in Core Document 21 'Shaping Perth's Transport Future', in particular the A9/A85 junction upgrade will have a positive impact on Inveralmond roundabout and the CTRL will further help to relieve the pressure currently experienced at this junction thereby negating the need for grade separation. Tests 5 and 10 in document AI-23 JDP Revised Development Content – Sensitivity Assessment provide the best evidence of the positive effect of both the A9/A85 junction upgrade and the CTRL on Inveralmond roundabout.

Perth and Kinross Council will be making a formal approach to the Scottish Government for funding and we are confident that a compelling case can be made.

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A9/Broxden issues

25. How would the southern H70 access work? From Broxden roundabout? If so, with or without grade separation? Is Transport Scotland content with an access from Broxden?

Perth & Kinross Council's Response:

The current solution being proposed by the developer for H70 is for a grade separated junction to be formed at Tibbermore which is approximately 4km from Broxden. There would appear to be agreement in principle from Transport Scotland to the idea of an access off the A9 at Tibbermore, but any final decision would be dependent on the outcome of further detailed modelling work to determine the effect that this proposal would have on the Trunk Road network.

However, Perth and Kinross Council are of the opinion that a dedicated stand alone access to serve the southern element of H70 would undermine wider sustainability objectives and should not be supported in isolation of an integrated strategy.. It is our view that an access strategy will be required to be delivered as part of H70 linking the A9 to the A85 and beyond, demonstrating how local access towards Perth City centre will be achieved and providing evidence of connectivity within the site.

A dedicated stand alone access serving the southern element of H70 would lead to inefficient journey route options as illustrated by the accompanying map (AI – 10).

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A9/Broxden issues

26. If there is to be an access to the A9 from west of the Broxden roundabout is there any flexibility on the normal minimum 1 km junction separation?

Perth & Kinross Council's Response:

We would fully expect that any proposed junction to the A9 from west of the Broxden roundabout would comply with current Design Manual for Roads and Bridges (DMRB) standards (Core Document 184).

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A9/Broxden issues

27. H70 was initially discounted as an option because of adverse roads implications. Is this correct? If so, what has changed the authority's mind?

Perth & Kinross Council's Response:

H70 was not initially discounted by Perth and Kinross Council. It was included as an option in the Main Issues Report. Subsequently, in their report following the Main Issues Report, officers recommended that H70 was not progressed to the Proposed Plan as a specific proposal, but that it should be excluded from the Green Belt and subject to further design work and evaluation as set out in the Report to Council of 10 January 2012 (AI_17). This clearly indicated the site had longer term potential.

It was decided by Council on 10 January 2012 to retain H70 Perth West as a proposal in the Proposed LDP (AI_18). The retention of Perth West is due to the need to accommodate long term expansion in the Perth area and to retain the ability to progress a range of available options. Furthermore, there would be greater risk to the maintenance of a long term effective housing land supply by not including Perth West as a development option. It would therefore be incorrect to state that H70 was initially discounted; it was in fact retained as a development option. Instead of being subject to further design work and evaluation, the Council considered it more appropriate to include H70 in the Proposed LDP.

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A9/Broxden issues

28. The plan assumes that 550 units can be delivered on H70 by 2024. What form would this take and on which road improvements would this depend?

Perth & Kinross Council's Response:

The Proposed Local Development Plan identifies the Site Specific Developer Requirements to which new developments will need to adhere. These include the requirement of a masterplan for the comprehensive development of the site setting out the phased release of both the housing, community and employment land. It also specifies a requirement for multiple vehicular access points to the development site providing access to both the trunk road network and central Perth without detriment to the local and strategic road network.

The development of H70 requires to be considered in relation to the overall strategy for the development of Perth and should not be considered in isolation. The full access strategy requires to be developed as part of an overall masterplan for H70 which will require demonstrating that it is acceptable to both the Council and Transport Scotland. The northern part of H70 was originally modelled as economic development land looking at only a single access onto the A85 in the Crieff Road area with the A9/A85 junction improvements in place. This was shown to be able to accommodate the equivalent of 500 dwellings (Please refer to Q18 response). The LDP allocates 550 dwellings which, although above the level considered suitable through the modelling work, is to reflect that progress has taken place on the delivery of the overall transport strategy for Perth and a suitable access strategy for site H70 implemented. The Council acknowledge this could be considered ambitious although work is underway by the applicants of H70 to determine a suitable access strategy in line with the Site Specific Developer Requirements. Consultation is ongoing between the Council, Transport Scotland and the developers to inform an appropriate access strategy. This strategy will help inform the masterplan for the site which will define the form that delivery would take.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



A9/Broxden issues

29. Grade separation of Broxden roundabout is a STPR project. What is latest estimate of timing? The TAYplan action plan says “*The funding and delivery of works at Broxden and Inveralmond roundabouts at Perth have not yet been confirmed.*” Is that still the case?

Perth & Kinross Council’s Response:

Although grade separation of Broxden roundabout was included in the STPR, Scottish ministers have recently stated that this was an aspiration and that detailed feasibility work will be required to determine what the final outcome might be.

Perth and Kinross Council cannot comment on the funding and delivery aspects of these proposed works and would contend that this is a matter for Transport Scotland to answer.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



A9/Broxden issues

30. For the southern half of H70 there is an offer from the developer (in Appendix 2 to representation 09166/16) to provide two left turn slip roads on the Broxden roundabout. Would this be unnecessary if grade separation is to take place? If so, would other works/contribution be appropriate in order to ensure “no net detriment”?

Perth & Kinross Council's Response:

The offer of two left turn slips on the Broxden roundabout would provide a mitigation measure for the current at-grade junction at Broxden. Should the current Scottish Government study being undertaken by AECOM indicate that a grade separated junction at Broxden is an appropriate solution then it would be expected that the design of the junction would make this offer unnecessary. However if it is proposed, in the longer term, to grade separate the Broxden roundabout, this solution may be required as an interim measure.

The access solution proposed by the developer for H70 (Perth West) of a grade separated junction at Tibbermore, is dependent on Broxden being upgraded, as stated in document (AI-28) Perth West Traffic Note. The access strategy would also need to take account of wider access issues including connectivity with the city centre and this is also noted in document (AI-28). Any assessment of contributions to other works required could only be made following agreement with regards to the full access strategy.

Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



A9/Broxden issues

31. What is the nature of Transport Scotland's current study on the A9 between Kier roundabout and Luncarty due to report in June, and what implications might this have for the proposed western expansion of Perth?

Perth & Kinross Council's Response:

It is Perth and Kinross Council's understanding that the current study being carried out by the consultants AECOM on the A9 between Keir roundabout and Luncarty is an initial feasibility study looking at options for all junctions between Keir roundabout and Luncarty, and at Broxden and Inveralmond in particular and the impact these interventions would have on the A9 and its interchange with the M90.

The study will take cognisance of the modelling work that has been undertaken by Perth and Kinross Council and it is expected that any action that arises from this study would complement the Council's proposals. However, it should be noted that the proposed western expansion of Perth is not dependent on the outcome of this study.

Archibald B (Brian)

From: [REDACTED]
Sent: 19 June 2013 14:23
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: LDP-340-1 - Perth & Kinross Local Development Plan
Attachments: Question 16 response.pdf; AI_30.pdf; AI_31.pdf; AI_32.pdf; AI_33.pdf; AI_34.pdf; AI_35.pdf; AI_36.pdf; AI_37.pdf; AI_38.pdf; Additional Information register.pdf

Dear [REDACTED],

Please find attached Perth & Kinross Council's response to question 16 and the associated Additional Information documents; also attached is the revised Additional Information Register.

Additional Information document AI_23 (traffic modelling report) will follow this afternoon.

Regards

[REDACTED]
Local Development Plan Technician

Planning & Regeneration
The Environment Service,
Perth and Kinross Council,
Pullar House,
35 Kinnoull Street,
Perth
PH1 5GD

[REDACTED]
www.pkc.gov.uk

From: [REDACTED]
Sent: 16 May 2013 16:17
To: [REDACTED]
Cc: [REDACTED]
Subject: LDP-340-1 - Perth & Kinross Local Development Plan

Dear [REDACTED] a

**PERTH AND KINROSS PROPOSED LOCAL DEVELOPMENT PLAN
THE TOWN AND COUNTRY PLANNING (DEVELOPMENT PLANNING) (SCOTLAND)
REGULATIONS 2008
ISSUES – 20d EFFECTIVENESS OF STRATEGIC SITES, 21 PERTH STRATEGIC
DEVELOPMENT AREA – WEST/NORTH WEST PERTH & 24 PERTH AREA (WITHIN CORE)
TRANSPORT INFRASTRUCTURE**

The reporters appointed by Scottish Ministers to examine the unresolved issues in respect of the above local development plan, have decided that they require further information in relation to the above issues.

They have, therefore, decided to request the submission of a written statement from the planning authority and a number of representors, in response to a series of questions. The questions and list of representors who have been invited to respond are set out in the attached annex. Please note that representors may only answer those questions to which they have been invited to respond, as specified in the attached annex.

The written statement should be as concise as possible and must not exceed 500 words for each answer. You are asked to submit your written statement to this office and to the representors listed by 5 pm on Friday 14 June 2013.

If your statement relies on material contained in any other document, you should enclose a copy of that document, or preferably of the relevant extract. A list of any such documents should also be provided at the same time.

If the reporter thinks it would be helpful to explore further the written statements provided, the parties in the attached list may be invited to attend a hearing session on Thursday 25 July 2013 at 10 am at North Inch Community Campus.

If a hearing session does take place, it will not necessarily consider all of the questions, as the reporter may have sufficient information from the written statements. Confirmation of whether or not a hearing session will take place, which questions it will consider and who will be invited will be sent to you as soon as possible after the further written statements have been received. The reporter expects the planning authority to take part in any hearing session.

All the written statements received shall be made available for viewing on the DPEA website:

<http://www.dpea.scotland.gov.uk/CaseDetails.aspx?id=qA341253>

Please do not hesitate to contact me if there is anything you would like to clarify.

Yours faithfully

[Redacted signature]

[Redacted name]

Development Plan Assistant

The Scottish Government
Directorate for Planning and Environmental Appeals
4 The Courtyard
Callendar Business Park
Falkirk
FK1 1XR

[Redacted address]

<http://www.scotland.gov.uk/Topics/Built-Environment/planning/Appeals/whatwedo/devplanexaminations>

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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Perth and Kinross Local Development Plan examination

Perth area housing sites and road issues – request for further submissions



A9/A85 issues

16. Has the council actually committed to forward fund the A9/A85 junction improvements? This is not entirely clear from Schedule 4 Document 452 (Committee Report) despite what is said in the authority's response to Issue 20d.

Perth & Kinross Council's Response:

Schedule 4 No. 20d and the Delivering Infrastructure background paper January 2013 (AI_37) sought to demonstrate the Council's commitment to taking the lead with the development of infrastructure to support the LDP strategy. The scale of the requirements and the multi phase nature of the works results in the projects and the funding package being developed over a number of years. Whilst the evidence submitted acknowledges that the Council will lead on the delivery of the key projects, it clearly points out that it will seek to recoup a proportionate share from other sources. Dialogue with Transport Scotland is ongoing and whilst no commitment to funding has been received the Council is convinced a compelling case can be made. The response to Question 6 notes the progress on the development of Supplementary Guidance to support Developer contributions towards essential transport infrastructure.

At its meeting on 19 December 2012 (AI_30 and AI_31) the Council agreed to support the requirement for A9/A85 Road Junction Improvements (PTF Phase 1) in principle until the level of funding from the Scottish Government and other developer contributions became known. The Council also instructed the Executive Director (Environment) to continue dialogue with Transport Scotland to secure additional funding towards the project. Dialogue is continuing with a view to developing a full funding strategy for the project for consideration by Council. In addition the Lifelong Learning Executive Sub-Committee of 6 February 2013 approved a report on Scotland's Schools for the Future – Phase 3 Update and noted Berthapark as the preferred location for a new all through campus (AI_32 and AI_33) see also School Estate Capital Programme Progress Update 7 March 2013 (AI_34). The funding arrangements from Scottish Futures Trust requires the completion of the school by March 2018 and it is implicit that the new A9/A85 junction and link to Berthapark are in place to serve this development by March 2018.

The Strategic Policy and Resources Committee on 17 April 2013 (AI_35 and AI_36) agreed that, in the interim to progress the project, it was necessary to fund approximately £400,000 for ground investigation and other consultancy costs.

A report is to be presented to the Council meeting of 26 June 2013 (AI_38), the report recommends that £23.5m is committed in the capital budget to allow the construction of an improved A9/A85 junction together with a connection across the River Almond to access the Berthapark site (H7). This will provide access to the proposed new school campus.

As detailed in this report the Council expects to recoup, through developer contributions, a significant proportion of the costs. The report also notes that £2.18m has already been secured through a S75 related to a Sainsbury's development at Huntingtower and that the Council is continuing dialogue with Transport Scotland regarding a contribution.

To date the Council has invested approximately £500,000 in feasibility studies and design work. A Project Board has been established to lead on the detailed design, land acquisition, procurement and delivery of the project. A Project Manager, who will report to the Project Board, is in the process of being appointed with responsibility to deliver the project. This development work and the series of reports outlined above further highlights the Council commitment to the project.

LDP-340-1 Perth & Kinross Local Development Plan

Written Statements - Supporting Documents 14 June 2013

Additional Information Ref	Title	Author	Year	Extract	Core_Doc	Question
AI_01	Map - CTRLR and A9 / A85 cost breakdown	PKC	2013			3,5
AI_02	Technical Note - Inveralmond Grade Separation	Halcrow	2009			6
AI_03	Developer Contributions Transport Infrastructure	PKC	May-13			3,6,7
AI_04	Strategic Transport Projects Review	Transport Scotland	2009	Proposal 16	Core_Doc_050	6
AI_05	TAYplan Strategic Development Plan	TAYplan	2012	Proposals map	Core_Doc_099	1, 6
AI_06	TACTRAN Delivery Plan	TACTRAN	2008?	page 13		1, 6
AI_07	NPF3 Assessment of Proposed National Developments Report	The Scottish Government	2013	page 62		6
AI_08	2011 Census First Results on Population and Household Estimates for Scotland - Release 1B	National Records of Scotland	2013	Table 2		6
AI_09	Springfield letter to Peter Marshall	Springfield	2013			23
AI_10	Map - A9 / A85 journey options	PKC	2013			25
AI_11	LDP Draft Action Programme	PKC	2012	page 25	Core_Doc_091	1, 12
AI_12	DMRB Stage 1 Preliminary Assessment Report (Version 4)	Halcrow	2011			12
AI_13	DMRB Stage 1 Preliminary Assessment Report (Version 4) Appendix C	Halcrow	2011			12
AI_14	Perth Traffic and Transport Issues Transport Appraisal	Halcrow	2010			12
AI_15	PKC Structure Plan Written Statement	PKC	2003	page 47	Core_Doc_093	18
AI_16	LDP Main Issues Report	PKC	2012	page 94-95	Core_Doc_095	18
AI_17	Proposed Plan Committee Report	PKC	2012	page 16		27
AI_18	Proposed Plan Committee Report Minutes	PKC	2012			27
AI_19	RTS Delivery Plan Committee Minutes	PKC	2008			2
AI_20	Shaping Perth's Transport Future SEA Environmental Report Appendix J: Mapping Mitigation & Enhancement Measures	PKC	2012			12
AI_21	LDP Main Issues Report	PKC	2012	page 80	Core_Doc_095	18
AI_22	Map - Bertha Park Link Road	PKC	2013			17
AI_23	Traffic Modelling Report	SIAS	2013			8,21,24

AI_24	Circular 3/2012 Planning Obligations and Good Neighbour Agreements	The Scottish Government	2012			6
AI_25	Section 75 Sainsbury's at Auction Mart	Shephard and Wedderburn LLP	2012			6
AI_26	Developer Contributions Transport Infrastructure Supplementary Guidance	PKC	Nov-12		S4_Doc_446	
AI_27	Perth City Plan	PKC	2013			
AI_28	Perth West Traffic Note	SIAS	2013			
AI_29	Map showing Access Points into Almond Valley Village	PKC	2013			20
AI_30	Report to Council - Composite Capital Budet - Additional Capital Expenditure	PKC	2012			16
AI_31	Composite Capital Budet - Additional Capital Expenditure - Minute	PKC	2012			16
AI_32	Report to Lifelong Learning Executive Sub-Committee - Scotland's Schools for the Future	PKC	2013			16
AI_33	Lifelong Learning Executive Sub-Committee - Scotland's Schools for the Future - Minute	PKC	2013			16
AI_34	Report to Lifelong Learning Executive Sub-Committee - School Estate Capital Programme Progress Update	PKC	2013			16
AI_35	Report to Strategic Policy and Resources Committee - Composite Capital Budget and Housing Investment Programme	PKC	2013			16
AI_36	Strategic Policy and Resources Committee - Composite Capital Budget and Housing Investment Programme - Minute	PKC	2013			16
AI_37	Delivering Infrastructure Background Paper	PKC	2013		S4_Doc_440	16
AI_38	Report to Council - Perth's Transport Future Project	PKC	2013			16

PERTH & KINROSS COUNCIL

19 December 2012

**COMPOSITE CAPITAL BUDGET -
ADDITIONAL CAPITAL EXPENDITURE**

Report by the Head of Finance

ABSTRACT

This report seeks approval to progress a number of significant capital infrastructure projects considered to be of a high priority for the Council. The report also seeks approval of the funding options.

1. RECOMMENDATIONS

It is recommended that the Council:

1. Approves the proposed additional capital infrastructure projects detailed in Section 3 of this report for inclusion within the Composite Capital Budget 2012/13 to 2016/17.
2. Instructs the Executive Director (Environment) to continue dialogue with Transport Scotland to secure additional funding towards the A9/A85 Road Junction Improvements (See paragraph 3.1.2)
3. Approves the proposed funding options set out in Section 4 of this report.
4. Approves the revised Prudential and Treasury Management Indicators set out at Section 5 of this report, including changing the Authorised Limit for gross external debt to £381M.

2. BACKGROUND

- 2.1 The Special Meeting of the Council on 9 February 2012 approved the 5 year Capital Budget for 2012/13 to 2016/17 (Report No. 12/53 refers). Since this budget was approved, significant new priorities have arisen following a series of recent events. These include planning decisions, additional grant awards, and the need to progress Section 75 agreements. A number of these projects require an early commitment, which precludes a delay in their consideration.
- 2.2 The projects are anticipated to bring significant economic development benefits to the Perth & Kinross area. These include inward commercial investment offering increased employment opportunities, particularly in the construction sector in the short to medium term as well as sustained employment in the longer term. Some of the proposed projects are also anticipated to increase visitor numbers for cultural attractions.

3. OUTLINE OF PRIORITY CAPITAL PROJECTS**3.1 A9/A85 Road Junction Improvements**

- 3.1.1 The impetus for this project arises following the Almond Valley and Sainsbury supermarket planning decisions. The Almond Valley developer had previously

indicated a willingness to fully fund the road junction improvement scheme, however this has lapsed following the rejection of the development proposals. It is anticipated that further developer contributions will arise from implementation of the Transport Infrastructure Developer Contributions Policy. Draft Supplementary Guidance for the policy was considered by the Environment & Infrastructure Committee on 7 November 2012 (Report No. 12/506 refers) to progress the consultation process. However, an early decision on the Council's commitment to progress the scheme (subject to funding) is required to allow Sainsbury to enter into a Section 75 agreement with the Council. This will allow the supermarket development to proceed, with a planned opening towards the end of 2014. The junction will also enable housing development at Perth West and the opening up of new industrial land at Inveralmond.

- 3.1.2 The indicative net capital cost for this project is £15M (after developer contributions). In the longer term, there is also the opportunity for partial recovery of costs in the form of further developer contributions. The Scottish Government may also be willing to assist with funding for this project as part of the A9 dualling upgrade and officers have commenced engagement with the relevant parties to ascertain the funding options available. The projected shortfall in funding for this project is currently in the region of £15M. The Executive Director (Environment) will continue dialogue with Transport Scotland to secure additional funding to reduce the projected shortfall.
- 3.1.3 It is therefore proposed that the Council support the requirement for this project in principle, until the level of external funding from the Scottish Government and other developer contributions is known.

3.2 Perth Theatre Redevelopment

- 3.2.1 The cost for the Redevelopment of Perth Theatre is currently estimated at £13.444M. Following the recent Creative Scotland announcement, third party funding pledged for the project now stands at £6M (£3M from The Gannochy Trust; £2M from Creative Scotland; £0.5M from The Heritage and Lottery Fund and £0.5M from individual pledges). The Council has previously committed funding of £3.02M (£1.92M within the current 5 year Capital Budget, £0.6M earmarked within Reserves and £0.5M of expenditure already incurred).
- 3.2.2 The funding gap has therefore reduced to £4.424M. It is proposed that the Council increase its contribution by up to £4.424M to the new sole member organisation to meet this projected shortfall in funding, pending clarification on any additional third party funding. The Executive Director (Education & Children's Services) will continue to explore all opportunities for attracting further third party funding.
- 3.2.3 A condition of grant funding by Creative Scotland is that a delivery plan is submitted by the end of December 2012, demonstrating how the funding shortfall is to be met. An early decision on the Council's contribution to meet the shortfall in funding will satisfy this grant requirement and also allow officers to commission the project, which has already been delayed as a result of the funding shortfall.

3.3 New Secondary School – North Perth

- 3.3.1 The meeting of the Executive Sub-Committee of the Strategic Policy and Resources Committee that took place on 11 July 2012 approved the submission of a bid to the Scottish Government for funding from the Scottish Futures Trust (SFT) for Scotland's Schools for the Future Programme (Report No. 12/299 refers). The Scottish Government has recently confirmed that the Council's bid was successful in obtaining funding for the secondary school element of a new "all through campus" in Perth.
- 3.3.2 The secondary school element of the project is estimated to cost £23M, and will be 2/3 funded by the Scottish Futures Trust (£15.333M). The Council will therefore require to fund the remaining 1/3 (£7.667M) on completion of the project, from its Capital Programme. The nursery (estimated at £2.52M) and primary school (estimated at £7.65M) elements of the project are not anticipated to be required until later years and funding for these elements of the project will be considered in the preparation of future budgets. Additionally, it is anticipated that the primary school will be funded from developer contributions.
- 3.3.3 The Schools for the Future invitation to bid refers to the original expectation that construction of the school would be commenced by 2017/18. It is therefore considered that construction of the new secondary school will require to be completed by the end of March 2018. Phasing of the construction will be developed with the Scottish Futures Trust.
- 3.3.4 An early decision on the Council's commitment is required in order that the Council can formally accept the Schools for the Future award. Details on the actual process for accepting the award are expected shortly.

3.4 New Primary School - Oudenarde

- 3.4.1 The cost of building a new primary school at Oudenarde is estimated at £12.5M, and there is currently provision in the 2013/14 Composite Capital Budget for only £1M. The remainder of the cost of the school is to be funded by developer contributions under a Section 75 agreement. However these potential contributions, totalling £11.5M, will now be received as development of the new village progresses. Therefore, the school construction will require up-front funding by the Council. Current house building rates mean that the developer contributions are likely to be received over a 20 to 30 year period. It is proposed that the shell of the whole new school will initially be constructed, with classroom fitting out anticipated to be undertaken in phases in line with future house construction and the resulting school roll requirements. No expenditure will be incurred by the Council until there is a demand for a school within this area. Therefore, future years phasing of the project will remain subject to review.
- 3.4.2 The Heads of Terms for the Section 75 agreement were included in a report to the Development Management Committee on 28 November 2012 (Report No. 12/531 refers). This includes the provision that £500K of the contribution will be payable by the developer on the implementation of planning consent for the first mainstream house. Thereafter, £100,000 will become payable upon the development of each acre (excluding the first 5 acres). The formal Section 75 Agreement is currently being negotiated with the developer.

3.4.3 An early decision by the Council is required in order that progress with the developer can be made in agreeing the Section 75 agreement.

3.5 Rural Broadband Step Change 2015 Programme

3.5.1 The Rural Broadband Step Change 2015 is a national programme funded by the Scottish Government which aims to support infrastructure funding to provide superfast broadband (defined as access line speed of greater than 24 Mbps) to 75% of premises in rural areas in each local authority. The national programme also aims to provide 100% broadband coverage with a minimum line speed of 2 Mbps to all business and residential premises. A contribution by this Council of £1.2M is proposed which will increase superfast broadband coverage to rural premises across Perth and Kinross to an estimated 80% of premises; help reduce the instances of slow download speeds in rural areas; eliminate broadband “non spots” throughout the area; and help deliver next generation broadband in settlements above 1,000 residents.

3.5.2 Local authority funding options are currently being discussed by Scottish Government officials and COSLA. However it is anticipated that any agreed Council contribution will be deducted from the Scottish Government General Capital Grant allocation in the years that funding was required. Although the proposed expenditure would be met from the Revenue Budget, it is therefore likely to be funded by Capital Grant which would otherwise be available for other capital investment.

3.5.3 An early decision is required to allow the Council to be included in the Invitation to Tender (ITT) as one of the areas where superfast broadband will be provided to more than 75% of all properties. The Scottish Government intends to issue the ITT on 14 December 2012, however it has been confirmed that the ITT will be revised to include the approved Council contribution should funding be agreed at this meeting.

3.6 Summary of Proposed Additional Capital Expenditure

3.6.1 All the new projects described above that are proposed for inclusion in the Composite Capital Budget at present are summarised in the following table:

Proposed New Projects	£'000
Perth Theatre Redevelopment (section 3.2)	4,424
New Secondary School (section 3.3)	7,667
New Primary School - Oudenarde (section 3.4)	11,500
Rural Broadband Step Change 2015 Programme (section 3.5)	1,200
Total Proposed Additional Capital Expenditure	24,791
A9/A85 Road Junction Improvements (section 3.1)	TBC

3.6.2 Councillors were presented with the details under pinning these projects in a presentation that took place on 10 December 2012.

3.6.3 The phasing of all the above expenditure proposals is shown at Appendix I.

4. FUNDING OPTIONS

4.1 Various funding options are available and those considered suitable are described in the remainder of this section. The funding solutions will evolve as further information (e.g. third party contributions) becomes available, and figures used at this stage have been based upon the project information that is available to date.

4.2 Third Party Contributions

4.2.1 There is potential for the A9/A85 Road Junction Improvements scheme to be linked to the dualling of the A9. Discussions are underway to ascertain if the proposed Council scheme may alleviate the need for A9 upgrade works at North Perth and complement existing Scottish Government plans for the A9 dualling scheme. Therefore, engagement with the Scottish Government and Transport Scotland has already commenced to ascertain whether additional funding is available to the Council.

4.2.2 In addition further developer contributions may become available towards funding the proposed Junction improvements. Contributions would also become due for the proposed new primary school in later years depending upon future housing developments.

4.2.3 As noted at Section 3.4 above, the proposed new primary school at Oudenarde will be funded in the longer term by developer contributions. It is estimated on current house building rates, that these contributions would be received over a period of 20 to 30 years as the new village development progresses. As the contributions are received, they will be applied to reduce the level of borrowing undertaken by the Council on this project. However, an initial £0.5M is anticipated under the Heads of Terms of the Section 75 agreement once planning consent is implemented, and therefore this has been included within the available resources. Further contributions of £100,000 per annum have been assumed from 2017/18 at this stage. However there is uncertainty surrounding the house build rates and the timing of the contributions. It is estimated that total contributions will eventually amount to £11.5M.

4.2.4 Negotiations on further third party funding are also continuing in respect of the Perth Theatre project.

4.3 Local Government Funding Settlements

4.3.1 There is a possibility that additional Scottish Government funding may become available through "Budget Consequentials" as a consequence of the UK Autumn Budget statement. It is anticipated that the use of such funds, should they become available, will be targeted to those local authorities having projects that are 'shovel ready' but which lack the required funding. This source of funding could be used towards the A9/A85 Road Junction.

4.3.2 Capital Monitoring Report No.1 approved by the Strategic Policy & Resources Committee on 19 September 2012 (Report No. 12/391 refers) identified additional General Capital Grant allocations totalling £1,744,000 for the years

2012/13 to 2014/15. These additional sums related to previous “Barnett Consequentials”, and have not yet been allocated by the Council to fund specific projects. It is therefore proposed that this additional grant is applied towards the funding required for the proposed capital expenditure in this report.

4.3.3 In addition, Finance Circular No. 5/2012 issued by the Scottish Government on 27 November 2012 included updated Capital Grant Funding for 2012/13 to 2014/15. This included the redistribution of Capital Grants in relation to Police authorities from 2013/14 which were previously paid to individual Councils. As a result of this redistribution a further £62,000 is available for allocation by the Council over the years 2013/14 to 2016/17. It is therefore proposed that this amount is also applied towards the funding of the proposed capital expenditure, giving a total of £1,806,000 additional Capital Grant for this purpose.

4.4 Contribution from Headroom/Reserves

4.4.1 A review of the current Medium Term Financial Plan and Revenue Budget monitoring shows that £3M of resources can be applied to funding the proposed capital projects in this report. It is currently anticipated that this contribution would comprise of £2M from Reserves and £1M from headroom in 2013/14. However the exact make up of this contribution will be recommended in the reports on the Revenue Budget 2013/14 & 2014/15 and Reserves Strategy to the special meeting of the Council on 14 February 2013. This will, also, reduce the budget options available when setting the 2013/14 and 2014/15 Revenue Budget and the Reserves Strategy.

4.5 Summary of Available Resources 2013/14 to 2017/18

4.5.1 All the available resources described above are summarised in the table below:

Proposed Funding	£'000
Initial Third Party Contributions (section 4.2.3)	700
Local Government Funding Settlements (section 4.3.3)	1,806
Use of Reserves/Headroom (section 4.4.1)	3,000
Total Proposed Additional Funding	5,506

4.5.2 The available funding in the table above compares with the proposed additional capital expenditure of £24.791M outlined in section 3.6.1. This therefore leaves a shortfall of funding of £19.285M. It is proposed that this amount is funded by additional borrowing in the first instance, however it is anticipated that an element of this will eventually be recouped from third party contributions.

4.5.3 The subsequent increase in loan charges as a result of this additional borrowing can be contained within current Revenue Budgets in the medium-term by utilising the Capital Fund and revising the current Treasury Strategy (see 4.6 below).

4.6 Revised Treasury Strategy & Use of the Capital Fund to Fund Borrowing Costs

- 4.6.1 The approved strategy for the Capital Fund is that any underspend in capital financing costs (“loan charges”) compared to the approved budget is transferred to the Capital Fund. This has resulted in the accumulation of the Capital Fund balance, which is estimated to be £12.8M by March 2013, peaking at approximately £22.5M in 2018/19. In future years, as annual loan charges increase, any excess loan charges (principal repayments) over budget are met from the Capital Fund to ensure that the actual loan charges met from the Revenue Budget do not exceed the budgeted amount. This reduces the Capital Fund balance in future years.
- 4.6.2 The current Treasury Strategy has assumed new external borrowing in each financial year to fund existing capital programmes and to replace maturing debt. The Council’s external borrowing could alternatively be reduced by utilising the Council’s investments to fund capital expenditure, at a time when investment returns are extremely low. The consequent savings in annual loan charges will increase the balance on the Capital Fund in the short to medium term, which in turn could be used to partially accommodate the increase in annual loan charges associated with increased new borrowing in the longer term.
- 4.6.3 It is therefore proposed that the Council does not undertake any further external borrowing during 2012/13 and 2013/14. The impact on the Capital Fund for each year is illustrated at Appendix II.
- 4.6.4 The impact of the proposed additional capital expenditure on the Loans Fund and Capital Fund has also been modelled, and is shown at Appendix III. This highlights that, based on current forecasts, the increased borrowing requirement and loan charges as a result of the new expenditure can be contained until 2024/25. Beyond this, the Loan Charges Budget will need to be reviewed to ensure it matches the estimated annual charges at that time. The extent of this will be dependant on several factors, including prevailing interest rates, rate of developer contributions and future Capital Budget strategies. However, on current assumptions, estimates show that the Loan Charges Budget will need to be increased by £2.174M in 2025/26, and by around a further £3.211M thereafter.
- 4.6.5 The impact on the funding strategy of adding the new A9/A85 junction, as well as the primary and nursery schools to the all through school in later years, can also be illustrated. This brings forward the loan charge deficit by 2 years to 2023/24, and is shown at Appendix IV.
- 4.6.6 As a consequence of the proposed strategy there is a risk that the Council will need to undertake increased amounts of new external borrowing in the future when interest rates may have increased. However, there remains a high level of uncertainty in the financial markets, and current forecasts are that interest rates will only increase gradually over time. This borrowing strategy will, however, continue to be monitored and reviewed to take account of interest rates.
- 4.6.7 It should also be noted that the estimated loan charges do not take account of any future contributions that may arise, other than the developer contributions for

Oudenarde Primary School. Therefore, any other contributions to the above schemes which may be received in future will reduce the annual Loan Charges from those shown within Appendices II, III and IV. This will have the effect of prolonging the strategy of using the Capital Fund to meet the increased Loan Charges in future years.

- 4.6.8 It is therefore proposed that any future developer contributions and grants from future housing developments are applied to reduce the borrowing outstanding on the proposed projects within this report.

4.7 Recurring Revenue Implications

- 4.7.1 In addition to the increased annual loan charges described in Section 4.6 above, many of the projects described in this report give rise to significant ongoing revenue costs, which will require to be contained within the Council's overall Revenue Budget.

5. PRUDENTIAL & TREASURY MANAGEMENT INDICATORS

- 5.1 The fundamental means of monitoring and controlling adherence to the Council's capital and treasury plans and ensuring that they remain affordable, sustainable and prudent is the determination and monitoring of Prudential & Treasury Management Indicators. These Indicators are set annually and relate to, and are consistent with the Council's approved Capital Budget and Treasury Management Strategy. Accordingly, the Prudential Indicators have been reviewed to incorporate the proposals set out in this report, and it is proposed to revise the Prudential & Treasury Management Indicators for the five year period as shown at Appendix V.
- 5.2 The revised Prudential Indicators include revised levels for the Council's estimated capital expenditure, borrowing requirements and loan charges as a proportion of the Council's Revenue Budget. However, of particular importance is the change to the Council's Authorised Limit for gross external debt, which can only be amended by the Council. It is proposed that the Authorised Limit for gross external debt is reduced from £449M to £381M as detailed at Indicator No.6 within Appendix V. The reduction in the limit reflects the strategy of reducing the current level of investments and deferring new external borrowing. The figure also takes account of when the borrowing requirement is at its peak over the five year period and is applied in each year (to allow flexibility). The Operational Boundary for each year is also shown within Appendix V.
- 5.3 The Council also operates under several other limits designed to safeguard the Council's money, covering interest rate exposures, volatility and debt maturity. Further policies, particularly in respect of investments, are designed to minimise the risks to which the Council is exposed. The approved policy and current limits are fully described within Treasury Management Policy 4 (*Approved Instruments, Methods & Techniques*). All the proposed Indicators comply with the CIPFA Code of Practice for Treasury Management in the Public Services.

6. CONSULTATION

- 6.1 The Chief Executive and all Executive Directors have been consulted in the preparation of this report.

7. COUNCIL CORPORATE PLAN OBJECTIVES 2009-2012

7.1 The Council's Corporate Plan 2009-2012 lays out five Objectives which provide clear strategic direction, informs decisions at a corporate and service level and shape resources allocation. They are as follows:-

- (i) A Safe, Secure and Welcoming Environment
- (ii) Healthy, Caring Communities
- (iii) A Prosperous, Sustainable and Inclusive Economy
- (iv) Educated, Responsible and Informed Citizens
- (v) Confident, Active and Inclusive Communities

7.2 The Chief Executive's Service provides a range of functions for internal and front-line customers alike. Those functions support the work of the whole Council by assisting them in the delivery of the Council's Corporate Objectives. As a consequence, this report does not specifically relate to one of the objectives, but assists with the delivery of all five.

8. EQUALITIES IMPACT ASSESSMENT

8.1 The information presented in this report was considered under the Corporate Equalities Assessment Framework and the determination was made that the items summarised in this report do not require further assessment as they do not have a direct impact on people's wellbeing.

9. STRATEGIC ENVIRONMENTAL ASSESSMENT

9.1 Strategic Environmental Assessment (SEA) is a legal requirement under the Environmental Assessment (Scotland) Act 2005 that applies to all qualifying plans, programmes and strategies, including policies (PPS). The matters presented in this report was considered under the Act and no further action is required as it does not qualify as a PPS as defined by the Act and is therefore exempt.

10. CONCLUSION

10.1 This report describes additional capital infrastructure projects which have emerged as priorities in light of changing circumstances, totalling £24.791M. The report also identifies a strategy to fund the proposed additional expenditure, and sets out various further funding options that can be explored to mitigate the increased loan charges in the long term. There will also be other significant ongoing revenue implications

10.2 The Council's approved Prudential and Treasury Management Indicators have also been revised. In particular, it is proposed to change the Council's Authorised Limit for gross external debt to £381M.

John Symon
Head of Finance

Contact Officer: John Jennings, Senior Accountant - Corporate Accounting
(ext 75564)

Note: No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

Finance Division, 2 High Street, Perth, PH1 5PH

Capital Budget 12-17 Report.doc

Date - 12 December 2012

If you or someone you know would like a copy of this document in another language or format, (on occasion only, a summary of the document will be provided in translation), this can be arranged by contacting *John Jennings 01738 475564*



Council Text Phone Number 01738 442573

PERTH AND KINROSS COUNCIL
COUNCIL MEETING
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COUNCIL MEETING

Minute of Meeting of Perth and Kinross Council in the Council Chambers, Fourth Floor, Council Building, 2 High Street, Perth on Wednesday 19 December 2012 at 10.30am.

Present: Provost E Grant, Councillors H Anderson, R Band, M Barnacle, P Barrett, R Brock, I Campbell, A Cowan, D Cuthbert, D Doogan, B Ellis, J Flynn, A Gaunt, J Giacobazzi, C Gillies, A Grant, T Gray, K Howie, A Jack, J Kellas, G Laing, A Livingstone, M Lyle, E Maclachlan, A MacLellan, I Miller, A Munro, D Pover, M Roberts, W Robertson, C Shiers, L Simpson, A Stewart, H Stewart, B Vaughan, G Walker, M Williamson, W Wilson and A Younger.

Also Attending: B Malone (Chief Executive); G Taylor, J Symon, K Donaldson, R Fry, C Flynn, S Walker, J Jennings (until Art. 681), D Coyne (until Art. 686), S Flanigan and M Kay (all Chief Executive's Service); D Burke, Executive Director (Housing and Community Care); J Walker and J Gilruth (both Housing and Community Care); J Fyffe, Executive Director (Education and Children's Services); B Atkinson, H Richardson (until Art. 679), F Robertson (until Art. 684) and C Deplano (all Education and Children's Services); J Valentine, Executive Director (Environment); B Renton, D Littlejohn, F Crofts, S Merone (until Art. 684) and I Henderson (all the Environment Service); J Moyes (Live Active Leisure) and I Halliday (Horsecross) (until Art. 683).

Also Attending: N O'Connor and S O'Hagan (Audit Scotland, External Auditors).

Apologies for Absence: Councillors J Coburn and D Melloy,

Provost E Grant, Presiding.

674. DECLARATIONS OF INTEREST

In terms of the Councillors' Code of Conduct, Councillors G Laing, M Roberts and H Stewart declared a non-financial interest in Art. 679 as Directors of Live Active Leisure and Councillors H Anderson and W Wilson declared a non-financial interest in Art. 679 as Directors of Horsecross Arts.

675. MINUTE

The Minute of the Meeting of Perth and Kinross Council of 3 October 2012 (Arts. 484-495) was submitted, approved as a correct record and authorised for signature.

676. MINUTES OF COMMITTEES

Minutes of Committees from 20 September 2012 to 21 November 2012

The decisions recorded in Arts. 448-483 and 496-586 copies of which had been circulated to all members of the Council were submitted and noted/approved as necessary, subject to:-

- (i) In relation to the Lifelong Learning Committee – 31 October 2012 - Article 524(iii) – Education and Children's Services Six Monthly BMIP Performance Exception Report to add "It be noted that the final version

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of the School Estate Strategy 2012-17 will be submitted to the Lifelong Learning Committee for approval”.

- (ii) In relation to the Environment Committee – 7 November 2012 – Article 555 – Aberfeldy Caravan Park – Councillor A Grant advised that additional information had been received after the meeting of the Environment Committee of sufficient importance that the matter would be considered further at the next meeting of the Environment Committee in January 2013.

677. EXTERNAL AUDIT – ANNUAL REPORT ON THE 2011/12 AUDIT

There was submitted a report by the Head of Finance (12/584) accompanying the External Auditors’ Annual Report on the 2011/12 Audit.

S O’Hagan, Audit Scotland, and senior Council officials answered members’ questions in relation to (1) accounting requirements in respect of Tayside Contracts; (2) progress being made on the central heating and rewiring contract; (3) the approach to monitoring spend on the capital programme; (4) progress on discussions with the Department of Work and Pensions on outstanding housing benefit issues; (5) the treatment of the account position on Kinross Common Good Fund in relation to the sale of Kinross Town Hall; and (6) the development of ‘value’ performance indicators measuring outcomes from resource inputs.

Resolved:

- (i) The content of the External Auditors’ Annual Report on the 2011/12 Audit as detailed in Report 12/584 be noted.
- (ii) The External Auditors’ Annual Report on the 2011/12 Audit be submitted to a future meeting of the Audit Sub-Committee for detailed consideration.

678. MEDIUM TERM FINANCIAL PLAN

There was submitted a report by the Head of Finance (12/585) (1) updating the Medium Term Financial Plan approved by Council on 14 December 2011 (Article 710/11 refers) in light of the most up to date commentary on the economic climate and information contained in Finance Circular No. 5/12 – the Local Government Finance Settlement offer for 2013/14 for Perth and Kinross Council and (2) setting out proposals in relation to the establishment of Investment in Improvement Fund Four.

Resolved:

- (i) The contents of the Report 12/585 be noted.
- (ii) The terms of the Settlement Offer for 2013/14 as set out in Section 4.3 of Report 12/585 and detailed in the letter of 20 September 2012 from the Cabinet Secretary for Finance, Employment and Sustainable Growth be agreed in full.
- (iii) The setting of a two year revenue budget by updating the previously approved Provisional Revenue Budget for 2013/14 and setting a new Provisional Revenue Budget for 2014/15 as set out in Section 6.2.6 of Report 12/585 be approved.
- (iv) A contribution of £3 million from reserves and revenue budget headroom to support the significant investment in capital infrastructure across Perth and Kinross as set out in Section 7.4 of Report 12/585 be approved, with the exact

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combination of funding sources being reported to the special meeting of the Council on 14 February 2013.

- (v) The preparation of an updated seven year Composite Capital Budget for the period 2013-2020 for submission to the Special Meeting of the Council on 14 February 2013, as set out in Section 7.10 of Report 12/585 be approved.
- (vi) The establishment of Investment in Improvement Fund Four with up to £1,000,000 being provided from revenue budget headroom to create capacity to support further service redesign to mitigate against future expenditure pressures, as set out in Section 11.4 of Report 12/585, be approved.

679. COMPOSITE CAPITAL BUDGET – ADDITIONAL CAPITAL EXPENDITURE

There was submitted a report by the Head of Finance (12/586) seeking approval to progress a number of significant capital infrastructure projects considered to be of a high priority for the Council and also the associated proposed funding options.

In response to a question from Councillor Barrett, I Innes, Head of Legal Services, confirmed that no legal action had been raised against the Council in relation to the Sainsbury supermarket development application.

Resolved:

- (i) The proposed additional capital infrastructure projects detailed in Section 3 of Report 12/586 be approved for inclusion within the Composite Capital Budget 2012/13 to 2016/17.
- (ii) The Executive Director (Environment) be instructed to continue dialogue with Transport Scotland to secure additional funding towards the A9/A85 Road Junction Improvements as set out in paragraph 3.1.2 of Report 12/586 and give consideration to how best to alleviate any disruption during the works to local accesses.
- (iii) The proposed funding options set out in Section 4 of Report 12/586 be approved.
- (iv) The revised Prudential and Treasury Management Indicators set out at Section 5 of Report 12/586, including changing the Authorised Limit for gross external debt to £381,000,000 be approved.

G TAYLOR LEFT THE MEETING AT THIS POINT.

680. REVIEW OF TREASURY MANAGEMENT SYSTEMS DOCUMENT

There was submitted a report by the Head of Finance (12/587) seeking approval of the revised Treasury Management Systems Document as required by the CIPFA Code of Practice for Treasury Management.

Resolved:

The revised Treasury Management Systems Document as referred to in Report 12/587 be approved.

681. TREASURY ACTIVITY AND COMPLIANCE REPORT – 2012/13 – QUARTER 2

There was submitted a report by the Head of Finance (12/588) providing a summary of Loans Fund transactions for the quarter ending 30 September 2012 and

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reporting on compliance with the Council's Treasury Management Policy Statement , Treasury Management Practices and the Investment Strategy for the same period.

Resolved:

- (i) The content of Report 12/588, which is submitted in accordance with the Council's approved Treasury Management Practices, be noted.
- (ii) The clarification of counterparty limits and interest received within the Treasury Management Practices Approved Lending and Investment Policy as detailed in Paragraph 5.1 of Report 12/588 be noted.
- (iii) The amendments to the Roles and Responsibilities and the Limitations to Authority as detailed in Paragraph 5.2 of Report 12/588 be approved.
- (iv) It be noted that the Prudential Indicators have not been updated in Report 12/588 as they have been reviewed as part of the separate report on the Composite Capital Budget considered at Article. 679 above.
- (v) The temporary reinstatement of the Co-operative Bank plc to the list of approved counterparties for investments to cover the Christmas Closedown of Perth and Kinross Council as detailed in Paragraph 5.3 of Report 12/588 be approved.

682. BIENNIAL REVIEW OF FINANCIAL REGULATIONS 2012

There was submitted a report by the Head of Finance (12/589) summarising the background and the process undertaken to review the Council's Financial Regulations and recommending approval of the revised Financial Regulations as appended to the Report.

Resolved:

The amended Financial Regulations contained at Appendix 1 to Report 12/589 be approved.

683. SECURING THE FUTURE FOR CULTURE AND LEISURE – PROGRESS REPORT (ART 491/12)

There was submitted a report by the Executive Director (Education and Children's Services) (12/590) setting out the continuing progress being made in establishing Live Active Leisure and Horsecross Arts as arms-length companies with sole member status, and the remaining steps required to conclude the process.

Resolved:

The further progress in establishing a new arms-length delivery model for culture and leisure services, and the anticipated timescales for concluding the process be noted.

G TAYLOR RETURNED TO THE MEETING DURING THE FOLLOWING ITEM

684. SECURING THE FUTURE THROUGH OUR PEOPLE

There was submitted a report by the Chief Executive (12/591) outlining (1) the positive people practices which have supported employees at all levels to manage transformational change and (2) identifying future plans for progression during 2013, to further develop the Council's commitment to support staff through challenging times, and ensure the approach to employee engagement is aligned with the

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achievement of Council priorities, to provide the best possible outcomes for recipients of services.

In response to a request for further information on categories of sickness absence for those aged fifty and over, the Head of Human Resources agreed to provide a breakdown of figures following the meeting.

Resolved:

- (i) The continued success of the workforce management measures be noted.
- (ii) The considerable range of organisational development activity taking place across the Council be noted.
- (iii) The continued provision of an annual report detailing progress relating to workforce management and organisational development be approved.

685. REVIEW OF POLITICAL DECISION-MAKING STRUCTURES (ART 218/12)

There was submitted a report by the Head of Democratic Services (12/596) setting out proposals following the review of the Council's political decision-making structure.

Motion (Councillors I Miller and A Grant)

The Council agree to:

- (i) **The existing committee-based decision-making structure being retained.**
- (ii) **The Modernising Governance Member/Officer Working Group keep the current remits of the committees under review to achieve the improved balance sought by members.**
- (iii) **The scrutiny of reports by Education Scotland continue to be considered by the Executive Sub-Committee of the Lifelong Learning Committee.**
- (iv) **The Modernising Governance Member/Officer Working Group give further consideration to the appropriate forum(s) for determining strategy and policy in relation to arts and cultural services and sport & leisure services.**
- (v) **Responsibility for the scrutiny of the performance of the organisations providing arts and cultural services and sport and leisure services on behalf of the Council be referred to the Scrutiny Committee, with effect from 1 January 2013.**
- (vi) **An Audit Committee be established with a membership of 7 and with the remit of the existing Audit Sub-Committee; appoint Councillor B Vaughan as convener and Councillor A Stewart as vice-convener of the Committee; and agree a senior councillor's allowance for the convener of the Audit Committee equivalent to that of the current vice-convener of the Scrutiny Committee and delete the senior councillor's allowance for vice-convener of the Scrutiny Committee with effect from 1 January 2013.**
- (vii) **The Modernising Governance Member/Officer Working Group give further consideration to the provision for external representation on the Audit Committee.**

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- (viii) **The Modernising Governance Member/Officer Working Group give further consideration to options for future consideration of asset management matters by elected members.**
- (ix) **The remit of the Community Safety Committee be amended to reflect the decision of the Police and Fire Reform Transitional Pathfinder Group, with effect from 1 April 2013, subject to the local police and fire and rescue plans being submitted to full Council in the first instance.**
- (x) **The current provisions in relation to Common Good Fund Committees be retained.**
- (xi) **The existing model for Member/Officer Working Groups be retained.**
- (xii) **The provision for non-Council membership on Committees be retained but that the Modernising Governance Member Officer Group give further consideration as to whether such membership should carry voting rights.**
- (xiii) **The Scheme of Administration be amended so that the non-Council membership of the Housing and Health Committee is drawn from all tenants' and residents' associations across the Council area, with effect from 1 January 2013.**
- (xiv) **Standing Orders 43 and 44 be amended to require that voting should be by roll-call with effect from 1 January 2013.**
- (xv) **The existing substitution provision in Standing Orders be retained, but that, with effect from 1 January 2013, Standing Order 58 be amended so that substitutes on Development Management Committee and Licensing Committee only be allowed where the substitute member has undergone relevant training, and also that the substitute member attends for the duration of the meeting.**
- (xvi) **The Modernising Governance Member/Officer Working Group give further consideration to existing provisions in Standing Orders on the use of delegated powers by committees and sub-committees.**
- (xvii) **The Scheme of Administration be amended with immediate effect to remove the provision at 17.2 regarding the appointment of the Depute Returning Officer.**
- (xviii) **The provision at 17.3 in the Scheme of Administration be amended to designate the Executive Director (Environment) as the Senior Information Risk Owner.**
- (xix) **The existing meeting cycle be retained and the Head of Democratic Services be instructed to finalise the timetable of meetings for 2013 on that basis.**

1st Amendment (Councillors P Barrett and W Wilson)

In addition to the Motion, as from 1 April 2013, the remits of the Community Safety and Environment Committees be merged into a single Committee comprising 13 members of the Council.

2nd Amendment (Councillors I Campbell and M Lyle)

In addition to the Motion, the Modernising Governance Member/Officer Working Group be requested to explore the best means of including local representation, in addition to local elected members, on Common Good Fund Committees where local communities have expressed a wish to become involved.

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A ROLL CALL VOTE HAVING BEEN REQUESTED IN TERMS OF STANDING ORDER 44

9 Members voted for the 2nd Amendment as follows:

Councillors Barnacle, Barrett, Campbell, Cuthbert, Gaunt, Lyle, Robertson, Simpson and Wilson.

30 Members voted for the Motion as follows:

Councillors Anderson, Band, Brock, Cowan, Doogan, Ellis, Flynn, Giacobazzi, Gillies, A Grant, Provost E Grant, Gray, Howie, Jack, Kellas, Laing, Livingstone, Maclachlan, MacLellan, Miller, Munro, Pover, Roberts, Shiers, A Stewart, H Stewart, Vaughan, Walker, Williamson and Younger.

5 Members voted for the 1st Amendment as follows:

Councillors Barrett, Gaunt, Robertson, Simpson and Wilson.

34 Members voted for the Motion as follows:

Councillors Anderson, Band, Barnacle, Brock, Campbell, Cowan, Cuthbert, Doogan, Ellis, Flynn, Giacobazzi, Gillies, A Grant, Provost E Grant, Gray, Howie, Jack, Kellas, Laing, Livingstone, Lyle, Maclachlan, MacLellan, Miller, Munro, Pover, Roberts, Shiers, A Stewart, H Stewart, Vaughan, Walker, Williamson and Younger.

Resolved:

In accordance with the Motion.

COUNCILLOR M LYLE LEFT THE MEETING AT THIS POINT

686. ESSENTIAL MAINTENANCE AND COMPLIANCE WORKS – 2 HIGH STREET AND CARPENTER HOUSE, PERTH (ART 384/10)

There was submitted a report by the Depute Director (Environment) (12/597) (1) outlining the essential maintenance and compliance works required for 2 High Street and Carpenter Street, Perth, (2) demonstrating that by rationalising the Council's property portfolio in Perth, there will be significant financial savings to be made in the longer term and (3) presenting an innovative solution to modernising the use of council accommodation using recurring revenue budget savings and modern ways of working.

Resolved:

- (i) The termination of the leases for The Atrium, Blackfriars, Riverview House and Whitefriars by 2017 be noted.
- (ii) The proposals as outlined in Section 4 of Report 12/597 be approved.
- (iii) The arrangements for Carpenter House and 2 High Street as outlined in Sections 5 and 6 of Report 12/597 be approved.
- (iv) The resource implications, including the additional capital expenditure of £1.25 million, as outlined in Section 9 of and further detailed in Appendix 1 to Report 12/597 be approved.

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- (v) The governance arrangements as detailed in Section 10 of Report 12/597 be approved.
- (vi) The project risks outlined in Appendix 2 to Report 12/597 be noted.
- (vii) The Executive Director (Environment) be instructed to bring back further reports with updates on progress on a regular basis throughout the project.

687. STRATEGIC DEVELOPMENT PLANNING AUTHORITY BOUNDARY CHANGE AND STRATEGIC ENVIRONMENTAL ASSESSMENT

There was submitted a report by the Executive Director (Environment) (12/592) requesting that the Council (1) ratify the decision of the Joint Committee of the Dundee, Perth, Angus and North Fife Strategic Development Planning Authority to ask the Scottish Ministers to amend the TAYplan boundary following the extension of the Cairngorms National Park in 2010 into parts of Eastern and Highland Perthshire and (2) note the decision of the Joint Committee to re-appoint Perth and Kinross Council as the responsible authority for the production of the Strategic Environmental Assessment of the next Strategic Development Plan.

Resolved:

- (i) The decision of the TAYplan Joint Committee to ask the Scottish Ministers to amend the TAYplan boundary involving the extension of the Cairngorms National Park in 2010 into parts of Eastern and Highland Perthshire be ratified.
- (ii) The decision of the TAYplan Joint Committee to re-appoint Perth and Kinross Council as the responsible authority for the production of the Strategic Environmental Assessment (SEA) of the next Strategic Development Plan be noted.

688. CHIEF SOCIAL WORK OFFICER'S ANNUAL REPORT 2011-2012

There was submitted a report by the Chief Social Work Officer (12/593) providing the Council with the Chief Social Work Officer's assessment of the functioning of social work and social care services within Perth and Kinross.

Resolved:

The Chief Social Work Officer's Annual Report as set out in Appendix 1 to Report 12/593 be approved.

689. PERTH AND KINROSS ADULT PROTECTION COMMITTEE BIENNIAL REPORT 2010-2012

There was submitted a report by the Executive Director (Housing and Community Care) (12/594) on the Adult Protection Committee's Biennial Report on Adult Support and Protection activities within Perth and Kinross, as required by the Scottish Government of all Adult Protection Committees in Scotland.

Resolved:

- (i) The Biennial Report on behalf of the Perth and Kinross Adult Protection Committee be affirmed.
- (ii) The Biennial Report be referred to the Perth and Kinross Community Planning Partnership for its interest.

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690. GAELIC LANGUAGE PLAN 2012-2017

There was submitted a report by the Executive Director (Education and Children's Services) (12/595) setting out how the Council will meet its statutory obligations under the terms of the Gaelic Language (Scotland) Act 2005, to publish a Gaelic Language Plan which will outline the measures the Council will take to raise the status of the Gaelic language across all Council services.

Resolved:

- (i) The draft Perth and Kinross Gaelic Language Plan 2012-2017 as detailed in Appendix 1 to Report 12/595 be approved.
- (ii) The governance arrangements to monitor, review and report on the development and implementation of the Gaelic Language Plan as outlined at Section 4 of Report 12/595 be approved.

691. APPOINTMENTS TO COMMITTEE

(i) Pre Determination Committee

Resolved:

Councillor B Band be appointed Convener and Councillor A MacLellan be appointed Vice Convener of the Pre-Determination Committee.

692. CHANGES TO COMMITTEE MEMBERSHIP

(i) Strategic Policy and Resources Committee

Resolved:

Councillor B Vaughan be appointed to the Strategic Policy and Resources Committee to replace Councillor C Shiers.

(ii) Community Planning Lifelong Learning Partnership

Resolved:

Councillor B Vaughan be appointed to the Community Planning Lifelong Learning Partnership to replace Councillor C Shiers.

(iii) School Estate Sub-Committee of the Lifelong Learning Committee

Resolved:

Councillor B Vaughan be appointed to the School Estate Sub-Committee to replace Councillor C Shiers.

693. APPOINTMENTS TO EXTERNAL BODIES

(i) Perth Prison Visiting Committee

Resolved:

Mrs Rachel A Gillespie, Ms Susan Maxwell, Mr Colin Glennie, Mr John Hughes, Mr Hugh P O'Neill and Mr David R May be appointed as non-

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Council members of the Perth Prison Visiting Committee, in terms of the Prisons (Scotland) Act 1989.

(ii) Children's Hearings (Scotland) Act 2011 – New Arrangements – Appointments to Tayside Area Support Team (Art 529)

Resolved:

Councillor B Vaughan be appointed to the Tayside Area Support Team and Councillor D Pover be recommended to the National Convener for appointment to the Tayside Area Support Team.

694. AMENDMENT TO SCHEME OF ADMINISTRATION

Resolved:

In relation to the Housing and Health Committee – 31 October 2012 – Article 518 – the Scheme of Administration be amended to confirm that the Executive Director (Housing and Community Care) be designated as the responsible person, as required by the Property Factors (Scotland) Act 2011, in relation to the property categories set out in Paragraph 5.4 of Report 12/481.

695. CHANGES TO TIMETABLE OF MEETINGS – JANUARY TO JUNE 2013 (ART 494/12)

Resolved:

- (i) A special meeting of the Council be held on Wednesday 23 January 2013 at 10.00am.
- (ii) The Development Management Committee scheduled to be held on Wednesday 23 January 2013 be held on Thursday 24 January 2013 at 9.30am.

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**PERTH AND KINROSS COUNCIL**

**Lifelong Learning Executive Sub-Committee – 6 February 2013**

**SCOTLAND'S SCHOOLS FOR THE FUTURE – PHASE 3 UPDATE**

**Report by Executive Director (Education and Children's Services)**

**ABSTRACT**

This report updates Members about the successful bid for the secondary element of an all through school under the Scottish Government's Schools for the Future initiative and subsequent capital provision for the residual element of the indicative cost. The report recommends a preferred location for the all through school/campus.

**1 RECOMMENDATIONS**

It is recommended that the Committee:

- 1.1 Approves acceptance of the offer of funding for the secondary element of the new all through school;
- 1.2 Notes Bertha Park, Perth as the preferred location of the new all through school/campus, subject to the required statutory consultation process; and
- 1.3 Instructs the Executive Director (Education and Children's Services) to bring forward a Proposal Paper in relation to the establishment of the new school and admission arrangements in terms of the Schools (Consultation) Act 2010 in due course.

**2 BACKGROUND**

- 2.1 On 11 July 2012 the Strategic Policy & Resources Executive Sub Committee (Report No.12/299 refers) agreed the submission of a bid to the Scottish Government for funding from the Scottish Futures Trust (SFT) for Scotland's Schools for the Future Programme, for the secondary element of a new all through school for the north and west of Perth and a replacement for a Consortium of Local Authorities Special Programme (CLASP) built primary school. In the event of any funding offer being made the Executive Director (Education and Children's Services) was instructed to seek approval of the Council prior to acceptance of the offer.
- 2.2 On 26 September 2012 the Cabinet Secretary for Education and Lifelong Learning announced funding would be made available for two thirds of the cost of the secondary element of the new all through school, subject to a positive outcome of the statutory consultation exercise. The bid for replacing the CLASP built primary school was unsuccessful.

- 2.3 The proposed all through school would provide accommodation for 1100 secondary pupils, a two stream primary school and a nursery of 8 full time and 40/40 sessional places.
- 2.4 The letter from the Head of Schools Infrastructure Unit of the Learning Directorate, Scottish Government confirming this award and the next steps is attached as Appendix A.
- 2.5 It is proposed that the Council accepts this offer of award for two thirds of the cost of providing the secondary school. It is noted that the Council meeting on 19 December 2012 allocated capital funding, to meet the cost for the remaining one third of the secondary school (Report No. 12/586 refers). It is anticipated that contributions from developers will cover the cost of providing the primary element of the all through school. The nursery element may require funding from the composite capital programme.
- 2.6 The design and development of the new all through school will be progressed in conjunction with the SFT and East/Central HubCo. It is recognised that there are economies of scale to be obtained through the design and procurement process and officers are currently working with SFT and HubCo to explore how best to achieve these.
- 2.7 As part of the funding offer the SFT has confirmed that the Council will be required to use the Design Build, Finance and Maintain (DBFM) form of contract, using East/Central HubCo to procure the project. The project will be financed by a mix of revenue and capital funding, revenue from the Scottish Government and capital from the Council.
- 2.8 Alongside the design and procurement decisions for the all through school there are a number of important issues that need to be progressed within the Council. Statutory consultation will require to be undertaken on the proposal to establish a new school on the proposed preferred site, along with the admission arrangements and catchment area for the proposed new school. It is likely that the admission arrangements will impact on existing primary and secondary school catchments within and around Perth.
- 2.9 The indicative timescale for this work is determined by the start on site date of March 2017. It is proposed to examine a number of options for establishing a catchment area for the new all through campus by modelling a range of options. Thereafter detailed proposals will be brought forward for Members' consideration by summer 2013. Then a proposal to undertake a statutory consultation on the preferred location and admission criteria will be developed and placed before Members by autumn 2013. Given the scale and complexity of the statutory consultation required for this exercise, a two year period has been programmed into the timescale.

### **3 SITE OF NEW ALL THROUGH CAMPUS**

- 3.1 Bertha Park has been identified as the preferred location for the new all through school. This is in line with the strategic and proposed local development plan land sites the campus within walking distance of the majority of the proposed new housing developments at Bertha Park and Perth

West. Oudenarde and Carse of Gowrie have been considered but were not viable options.

A range of further work has been identified that needs to be taken forward as part of the development of this project.

- 3.2 The timescale for development of the new all through campus is complex and contains a number of dependencies. In addition to procuring the design and construction, a catchment area for the new all through school is required. The ability of the Council to acquire the site and have the infrastructure in place to access it are the current major risks to the progress of the preferred option.
- 3.3 In order to reduce and mitigate these risks Officers need to continue ongoing discussions with a range of parties to determine their intended timescales and bring back reports to Members on progress with these discussions.
- 3.4 Should it prove unviable to progress with the preferred location an appraisal of the situation would take place at that time.

## 4 CONSULTATION

- 4.1 The Head of Democratic Services, Head of Finance, Head of Legal Services, Head of Technical Services and Head of Planning and Regeneration have been consulted in the preparation of this report.

## 5 RESOURCE IMPLICATIONS

### 5.1 Capital

The funding strategy for each element of the new all through school is shown in the table below:

#### **New all through school/community campus**

|                  | <b>Council</b> | <b>SFF<br/>Phase 3</b> | <b>Developer<br/>Contribution</b> | <b>Total £m</b> |
|------------------|----------------|------------------------|-----------------------------------|-----------------|
| <b>Nursery</b>   | 2.52           |                        |                                   | 2.52            |
| <b>Primary</b>   |                |                        | 7.85                              | 7.85            |
| <b>Secondary</b> | 7.66           | 15.33                  |                                   | 22.99           |

### 5.2 Revenue

Detailed revenue costs cannot be established until the project design is confirmed, however estimated additional recurring costs have been identified. It is assumed the revenue implications will be met from Council Tax collections and the PKC Financial Settlement from the Scottish Government. These costs will escalate to the level of approximately £7,200,000 per annum when the school is fully operational as an all through school/community campus.

## 6 COUNCIL CORPORATE PLAN OBJECTIVES 2009-2012

6.1 The Council's Corporate Plan 2009-2012 lays out five Objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:-

- (i) A Safe, Secure and Welcoming Environment
- (ii) Healthy, Caring Communities
- (iii) A Prosperous, Sustainable and Inclusive Economy
- (iv) Educated, Responsible and Informed Citizens
- (v) Confident, Active and Inclusive Communities

This report relates to all five objectives.

6.2 The report also links to the Education & Children's Services Policy Framework in respect of the following key policy area:

- Maximising Resources

## 7 EQUALITIES IMPACT ASSESSMENT (EqIA)

7.1 An equality impact assessment needs to be carried out for functions, policies, procedures or strategies in relation to race, gender and disability and other relevant protected characteristics. This supports the Council's legal requirement to comply with the duty to assess and consult on relevant new and existing policies.

7.2 The function, policy, procedure or strategy presented in this report was considered under the Corporate Equalities Impact Assessment process (Eq1A) with the following outcome:

- i) Assessed as **not relevant** for the purposes of Eq1A

## 8 STRATEGIC ENVIRONMENTAL ASSESSMENT

8.1 Strategic Environmental Assessment (SEA) is a legal requirement under the Environmental Assessment (Scotland) Act 2005 that applies to all qualifying plans, programmes and strategies, including policies (PPS).

The matters presented in this report were considered under the Environmental Assessment (Scotland) Act 2005 and no further action is required as it does not qualify as a PPS as defined by the Act and is therefore exempt.

## 9 CONCLUSION

9.1 This report recommends acceptance of the Scottish Government's offer of two thirds of the cost to build the new secondary school in Perth. The financial arrangements for the remaining balance of funding for the all through campus are also set out together with indicative timescales. The Outline Business

Case for the new all through school is considered with a proposal of Bertha Park as the preferred site location.

**JOHN FYFFE**  
**Executive Director (Education and Children's Services)**

**Note:** No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

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**Date:** 24 January, 2013

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Council Text Phone Number 01738 442573

## **EXECUTIVE SUB-COMMITTEE OF THE LIFELONG LEARNING COMMITTEE**

Minute of Meeting of the Executive Sub-Committee of the Lifelong Learning Committee held in the Committee Room, Fourth Floor, Council Building, 2 High Street, Perth on Wednesday 6 February 2013 at 2.00pm.

Present: Councillors B Band, C Gillies, B Vaughan, G Walker and W Wilson.

In Attendance: J Fyffe, Executive Director (Education and Children's Services), J Gilchrist, H Richardson, K Robertson, C Mackie, S Devlin, A Dalziel and G Le Blanc (all Education and Children's Services); M Willis and Y Oliver (both Chief Executive's Service); S McColgan, Head Teacher, Milnathort Primary School.

Apology for Absence: Mrs H Bridge.

Councillor B Band, Convener, Presiding

### **1. DECLARATIONS OF INTEREST**

There were no Declarations of Interest made in terms of the Councillors' Code of Conduct.

### **2. SUMMARY REPORTS ON STANDARDS AND QUALITY IN SCHOOLS, PRE-SCHOOL CENTRES AND COMMUNITY LEARNING AND DEVELOPMENT**

There was submitted a report by the Executive Director (Education and Children's Services) (13/65) advising the Committee of the key findings and progress with areas for improvement following the inspection of Cheeky Monkeys Nursery and Milnathort Primary School and Nursery Class by Her Majesty's Inspectorate (HMI).

#### **Resolved:**

Having heard the Head Teacher and relevant officers report on the main points for action and improvement in each case, and following scrutiny and comment by the Committee, it was agreed that the following reports, attached in Appendices 1a, 1b, 2a and 2b of Report 13/65, be noted:

- Summary and Education Scotland inspection letter of Cheeky Monkeys Nursery (Appendix 1a)
- Cheeky Monkeys Nursery Extended Learning and Achievement Visit, March 2012 (Appendix 1b)
- Summary and Education Scotland inspection letter of Milnathort Primary School and Nursery Class (Appendix 2a)
- Milnathort Primary School and Nursery Class Extended Learning and Achievement Visit, September 2010 (Appendix 2b).

PERTH AND KINROSS COUNCIL  
LIFELONG LEARNING COMMITTEE (Art. 160(iii)(c)) (Appendix IV)  
13 MARCH 2013

**3. CARE INSPECTORATE INSPECTIONS OF SUPPORT AND RESIDENTIAL CARE SERVICES FOR CHILDREN AND YOUNG PEOPLE**

There was submitted a report by the Executive Director (Education and Children's Services) (13/66) setting out the key findings and areas for improvement following the inspection of We Care Perthshire by the Care Inspectorate completed in September 2012.

**Resolved:**

Following scrutiny and comment by the Committee on Report 13/66, the Care Inspectorate Inspection Report for We Care Perthshire (Appendix 1) be noted.

**4. SCOTLAND'S SCHOOLS FOR THE FUTURE – PHASE 3 UPDATE**

There was submitted a report by the Executive Director (Education and Children's Services) (13/67) (i) updating members on the successful bid for the secondary element of an all through school under the Scottish Government's Schools for the Future initiative and subsequent capital provision for the residual element of the indicative cost and (ii) recommending a preferred location for the all through school/campus.

**Resolved:**

- (i) Acceptance of the offer of funding for the secondary element of the new all through school, be approved.
- (ii) It be noted that Bertha Park is the preferred location of the new all through school/campus, subject to the required statutory consultation process.
- (iii) The Executive Director (Education and Children's Services) be instructed to bring forward a Proposal Paper in relation to the establishment of the new school and admission arrangements in terms of the Schools (Consultation) Act 2010 in due course.

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PERTH AND KINROSS COUNCIL

Lifelong Learning School Estate Sub-Committee – 7 March 2013

SCHOOL ESTATE CAPITAL PROGRAMME PROGRESS UPDATE

Report by Executive Director (Education and Children's Services)

ABSTRACT

This report updates Committee on progress and proposals for delivering the current capital projects within the Education and Children's Services programme. It also provides information on additional funding which has been approved through the composite capital programme and external bodies for school estate projects.

1 RECOMMENDATIONS

It is recommended that the Committee:

- 1.1 Notes that the Council's bid for additional funding for Oakbank Primary School was successful in attracting funding of £187,594 from the HubCo East Central Territory;
- 1.2 Notes that the Council received funding of £2,276,000 in February 2013 for the Invergowrie project from the Scottish Government through the Scottish Futures Trust (SFT);
- 1.3 Notes that additional funding was approved for the new secondary school near Perth and a new primary school at Oudenarde through the composite capital programme at Council on 19 December (report 12/586 refers);
- 1.4 Notes that Bertha Park was noted as the preferred location for the new all through school by members at Lifelong Learning Executive Sub-Committee on 6 February 2013, subject to the required statutory consultation process (report 13/67 refers);
- 1.5 Notes the proposed budget and monitoring adjustments to the five year Composite Capital Budget 2012/13 to 2016/17 approved by the Strategic Policy and Resources Committee on 13 February 2013;
- 1.6 Notes the three year Composite Capital Budget 2017/18 to 2019/20 approved by Special Council on 14 February 2013 (report 13/54 refers), which provides an additional £21,815,000 towards to school estate;
- 1.7 Notes the positive feedback from the Scottish Government Learning Directorate in relation to the School Estate Management Plan (SEMP); and
- 1.8 Notes progress on the existing programme in relation to primary school upgrades, secondary school upgrades and other projects.

2 CAPITAL BUDGET 2012/13 to 2019/20

- 2.1 The Strategic Policy and Resources Committee on 13 February 2013 (Report 13/52 refers) approved the proposed budget and monitoring adjustments to the five year Composite Capital Budget 2012/13 to 2016/17.

- 2.2 The Council meeting on 19 December 2012 (report 12/586 refers) approved £24,791,000 additional funding to progress a number of priority infrastructure and property projects. These projects included a new secondary school in North Perth and a new school at Oudenarde.
- 2.3 Special Council on 14 February 2013 approved the Composite Capital Budget for 2017/18 to 2019/20 (report 13/52 refers). The budget includes contributions of £21,815,000 towards the school estate.
- 2.4 The new capital profile for Education and Children's Services (ECS) is contained as Appendix A and totals £104,250,000 over 8 years.

All through campus

- 2.5 The Council was recently successful in obtaining funding from the Scottish Government for the secondary school element of a new "all through campus" near Perth. This funding is provided on the basis that the Council will fund one third of the cost of the school. Funding of £7.67M was approved through the composite capital budget report at Full Council on 19 December 2012 in order to 'match' the government funding.
- 2.6 The nursery (estimated at £2.52M) and primary school (estimated at £7.65M) elements of the project are not anticipated to be required until later years and funding for these elements of the project will be considered in the preparation of future budgets. Additionally, it is anticipated that the primary school will be funded from developer contributions.
- 2.7 Bertha Park was noted as the preferred location for the new all through school by members at Lifelong Learning Executive Sub-Committee on 6 February 2013, subject to the required statutory consultation (report 13/67 refers). This is in line with the strategic and proposed local development plan land and sites the campus within walking distance of the majority of the proposed new housing developments at Bertha Park and Perth West.
- 2.8 The conditions of the offer of funding for the secondary school state that the investment programme is scheduled to be delivered by the end of financial year 2017/18. It is therefore considered that construction of the new secondary school will require to be completed by the end of March 2018. Phasing of the construction will be developed with the Scottish Futures Trust and HubCo.
- 2.9 The timescale for development of the new all through campus is complex and contains a number of dependencies. In addition to procuring the design and construction, a catchment area for the new all through school is required. The ability of the Council to acquire the site and have the infrastructure in place to access it are the current major risks to the progress of the preferred option.
- 2.10 Angus, Fife and Dundee Councils have also received funding towards new secondary schools through Scottish Futures Trust (SFT) Phase 3. Through the East Central Hub, collaborative work is taking place to develop areas of commonality, innovation and best practice.

Oudenarde

- 2.11 There is provision of £1.02M towards the cost of a new primary school at Oudenarde in the current capital programme. The remaining £11.5M required to construct the school is to be funded through Section 75 Developer contributions. These potential contributions will be received as development of the new village progresses and therefore upfront funding for the construction of the school will be provided by the Council.
- 2.12 This funding was approved as part of the composite capital programme on 19 December 2012. It should be noted that no expenditure will be incurred by the Council until there is a demand for a school within the area, as approved at Lifelong Learning Committee on 16 January 2013 (report 13/17 refers). The report also approved the proposal to build the school as a two stream primary school with initially only 7 classrooms fully fitted out (remaining rooms to be fitted out as required).

3 UPDATES ON CURRENT PROGRAMME

- 3.1 The School Estate programme is focused on, and updates are provided in, the following key areas:

- Primary School Upgrades
- Secondary School Upgrades
- Other Projects

3.2 Primary School Upgrade Programme

3.2.1. **Abernethy Primary School**

On 11 March 2009, the School Estate Sub Committee (report No. 09/151 refers) approved the development of the longer term scheme for Abernethy Primary School as part of the Primary School Upgrade programme. The gross financial value of this project is £5,000,000.

Work is progressing on site and the project has experienced up to 3 weeks weather related delay. However, completion of all phases of the project, which includes the main building works, removal of the temporary decant and installation of the Multi Use Games Area (MUGA) is still anticipated by August 2013.

3.2.2. **Crieff Primary School**

A new school will be developed on the site adjacent to Strathearn Community Campus which was purchased on 16 December 2011. The gross financial value of this development is £14,006,000.

A period of formal consultation regarding this proposal was undertaken in line with the requirements of the Schools (Consultation) (Scotland) Act from Friday 16 November 2012 until Friday 25 January 2013. As part of this consultation

public meetings were held at Strathearn Community Campus on 11 December 2012 and 10 January 2013. The consultation is now in the second phase where HMI will prepare a report on the educational aspects of the proposal.

It was planned that design work up to stage C (outline) would be undertaken by Property Services. The Project Board, however, has agreed that responsibility for the whole design process would transfer to the East Central Hub. This will facilitate a collaborative approach on the Oakbank and Crieff projects delivered through sharing consultants and constructors. Council Officers have recently selected a design team and other consultants for both projects through the HubCo framework.

3.2.3. **Glenlyon Primary School**

These works will deliver flexible general purpose spaces and a new office in the adjacent former schoolhouse. The funding available for all works at this point is £337,000.

Statutory consent was granted at Development Management Committee on 28 November 2012 (report 12/547 refers) and works are planned to take commence in summer 2013. The programme is scheduled to continue into the first term of 2013/14 and options are being considered in relation to accommodating the children during this period.

3.2.4. **Inchture Primary School**

Expansion of Inchture Primary School is required to accommodate the predicted numbers of pupils from known house building. The scope of the project includes 2 additional classrooms, a General Purpose (GP) room, extending the school learning resource library and a hall to deliver the primary school PE curriculum.

The budget has not yet been finalised for this project.

A User Reference Group took place to develop the design and a planning application has been submitted.

Discussions are ongoing with the community with regard to enhanced outdoor sports provision.

3.2.5. **Invergowrie Primary School**

Work commenced on site in October 2012 to replace Invergowrie Primary School and the current indicative completion date is January 2014.

The overall value of the project is £7,852,000. This includes a grant from the Scottish Government totalling £2,466,913. The final instalment of the grant (£) is imminent.

3.2.6. **Kinnoull Primary School, Perth**

This project will renew the life-expired building currently used as a learning resource, provide two modular classrooms that will be linked to the main building and renew toilets in the school. In addition Property Services are taking the opportunity to replace major infrastructure including heating, plumbing and electric works.

Listed building consent was granted by Historic Scotland for the extension and the hall on 28 November 2012. Work on site is due to commence in February 2013 and should be complete by December 2013.

On 13 February 2013 the Strategic Policy and Resources Committee approved an additional £245,000 for this project from the Primary School Upgrade Programme to fund costs associated with drainage infrastructure, asbestos removal and site constraints (Report 13/52 refers).

Kinnoull Primary School has been decanted to Inchview Primary School until the work is completed.

3.2.7. **Oakbank Primary School, Perth**

Funding of £8,500,000 for this school was approved by Council on 9 February 2012 (Report no. 12/53 refers), in the setting of the Capital Programme for 2012/13 to 2016/17.

Approval of the options appraisal, which recommended replacing the existing primary school and nursery with a purpose built combined facility adjacent to the existing school and nursery, was granted at School Estate Sub Committee on 15 November 2012 (Report 12/524 refers).

In common with Crieff Primary School, Oakbank development will be undertaken by the East Central Hub. The Council were advised on 14 December 2012, that a bid for enabling funds to the HubCo Territory Programme Board had been successful and that an additional £187,594 has been made available to the Oakbank project to be used for enabling works.

3.3 Secondary School Upgrade Programme

3.3.1. **Perth Academy**

Work is progressing to build an all weather pitch (AWP) at Perth Academy. Community consultation took place in February 2013 and work is expected to begin on site in summer 2013. Consideration is also being given to the facilities to be provided from extended indoor sports accommodation. The funding available for these facilities is £2,000,000.

A brief of requirements is also being developed with the school in relation to upgrading classrooms, social areas and toilets.

3.3.2. Perth High School

Statutory approval was granted for a sports hall and associated facilities for Perth High School at Development Management on 20 February 2013 (report 13/81 refers).

The provision of the sports hall will improve the sporting facilities at the school, resulting in better provision of educational and extra curricular sporting activities. In addition the intention is for this facility to become part of a proposed Community Sports Hub (CSH) which would be governed by the Council's Sport and Active Recreation Services and would allow the facilities to be let.

3.4 Other Projects

3.4.1. NAVIGATE (George Inn Lane)

A central resource base for secondary pupils which will mirror the work currently undertaken for primary pupils at Almondbank House is being developed in George Inn Lane. The value of this project is £950,000.

The base has been named NAVIGATE by the current users who are relocated in Blackfriars.

Work began on site on 26 November 2012 and is progressing on schedule to a completion date of June 2013.

3.4.2. Rattray Community Facilities

Rattray Primary School is being extended to provide flexible spaces for the delivery of services for children and families, and the community.

Statutory Approval was granted by Development Management Committee for the extension on 28 November 2012. Statutory approval for the biomass installation was granted on 20 February 2013 (Reports 12/543 and 13/79 respectively refer).

The project is being funded through the Council's capital programme with an additional £414,000 being provided through a Scottish Government grant. On 13 February 2013 Strategic Policy and Resources Committee approved an additional £430,000 for this project (report 13/52 refers) to fund costs associated with upgrading infrastructure within the school and meeting planning conditions. The value of the project is now £3,039,000 (including £130,000 capital TES contribution)

4 SCOTTISH GOVERNMENT LEARNING DIRECTORATE

- 4.1 At the Lifelong Learning School Estate Sub Committee held on 15 November 2012 the Service Asset Management Plan 2012 (incorporating School Estate Management Plan) (report No 12/525 refers) was discussed. Within this report it was noted that an annual meeting is held with the Scottish

Government Learning Directorate to monitor progress being made in managing the school estate and share good practice. This meeting was held by teleconference in November and some of the key discussion is detailed below.

- 4.2 It was noted that Perth and Kinross Council had good forward planning systems in place that established a clear link between the needs identified through asset management to investment requirements for the capital programme. Integrated working between planning, education, and finance were evident from the plan and the progress made thus far. The Council were commended for having plans in place to improve the condition of those few schools currently graded C and the early communication and engagement with Parent Councils, local members, staff and pupils when developing and designing school improvement projects.
- 4.3 The Council were reminded that there was national leverage for co-location of public services and encouraged to consider these where possible.
- 4.4 An update was given on the intended timescale for the publication of the report from the Commission on the Delivery of Rural Education which had been delayed due to an appeal being heard at the Court of Session. It was indicated during the discussion that the timescale for publishing the report was early 2013 and there has been no further information since then.
- 4.5 The meeting drew to a conclusion with confirmation that no further phases of funding for Building Better Schools were planned in the near future.

5 CONSULTATION

- 5.1 The Head of Democratic Services, Head of Legal Services, Head of Finance and Head of Technical Services have been consulted in the preparation of this report. Head Teachers and Services have been consulted through the School Estate Management Plan (SEMP) group.
- 5.2 Participation and involvement of the community are critical to the ongoing and future success of school estate investment and an emphasis is placed on ensuring consultation, over and above that which might be required in terms of planning requirements.
- 5.3 A User Reference Group (URG) is set up for all major and large projects. The purpose of the URG is to assist with providing relevant local input to allow the Design Team to develop the outline concept design into an operational design. The formation of a URG is an invaluable source of information, and any project is reliant on this level of local detail.

6 RESOURCE IMPLICATIONS

- 6.1 The Strategic Policy and Resources Meeting on 13 February 2012 approved the adjustments to the Composite Capital Budget 2012/13 – 2016/17 (Report No. 13/52 refers).

- 6.2 The Council meeting on 19 December 2012 approved additional funding to progress a number of priority infrastructure and property projects (report 12/586 refers). These projects include a new secondary school near Perth and a new school at Oudenarde.
- 6.3 Any additional revenue implications identified through either the existing capital programme, or future capital programmes, will require to be submitted as part of an expenditure pressure with a corresponding saving through the revenue budget process.

7 COUNCIL CORPORATE PLAN OBJECTIVES 2009-2012

7.1 The Council's Corporate Plan 2009-2012 lays out five Objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:-

- (i) A Safe, Secure and Welcoming Environment
- (ii) Healthy, Caring Communities
- (iii) A Prosperous, Sustainable and Inclusive Economy
- (iv) Educated, Responsible and Informed Citizens
- (v) Confident, Active and Inclusive Communities

This report relates to all of the Council's five objectives.

7.2 The report also links to the Education & Children's Services Policy Framework in respect of the following key policy area:

- Maximising Resources

8 EQUALITIES IMPACT ASSESSMENT (EqIA)

8.1 An equality impact assessment needs to be carried out for functions, policies, procedures or strategies in relation to race, gender and disability and other relevant protected characteristics. This supports the Council's legal requirement to comply with the duty to assess and consult on relevant new and existing policies.

8.2 The function, policy, procedure or strategy presented in this report was considered under the Corporate Equalities Impact Assessment process (Eq1A) with the following outcome:

- i) Assessed as **not relevant** for the purposes of EqIA.

9 STRATEGIC ENVIRONMENTAL ASSESSMENT

9.1 Strategic Environmental Assessment (SEA) is a legal requirement under the Environmental Assessment (Scotland) Act 2005 that applies to all qualifying plans, programmes and strategies, including policies (PPS).

9.2 However, no action is required as the Act does not apply to the matters presented in this report. This is because the Committee are requested to note the contents of the report only and the Committee are not being requested to approve, adopt or agree to an action or to set the framework for future decisions.

10 CONCLUSION

10.1 This report updates School Estate Sub Committee on the Education and Children's Services capital projects, which are currently in progress, including details of budget adjustments approved by Full Council on 19 December 2012 and the re-profiling of the budget approved by Strategic Policy and Resources Committee on 13 February 2013.

10.2 Also of note, is the additional capital funding through the composite capital budget approved on 19 December which will allow the Council to progress with a new secondary school in North Perth and a new primary school at Oudenarde and the additional £21,815,000 allocated to school estate for 2017/18 to 2019/20.

JOHN FYFFE

Executive Director (Education and Children's Services)

Note: No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

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PERTH AND KINROSS COUNCIL

Strategic Policy and Resources Committee – 17 April 2013

**COMPOSITE CAPITAL BUDGET & HOUSING INVESTMENT PROGRAMME
2012/17 – MONITORING REPORT NUMBER 4**

Report by the Head of Finance

PURPOSE OF REPORT

This report provides a summary position to date for the Composite Capital Programme and Housing Investment Programme for 2012/13 to 2016/17, and seeks approval for adjustments to these Programmes. This report also includes a proposed Renewal & Repairs Fund Budget for 2013/14.

1. BACKGROUND / MAIN ISSUES

- 1.1 The meeting of this Committee on 13 February 2013 approved a revised five year Composite Capital Budget for the 5 years to 2016/17. The approved budget totalled £31,646,000 for 2012/13, £52,232,000 for 2013/14, £61,871,000 for 2014/15, £43,428,000 for 2015/16 and £37,225,000 for 2016/17. This was based on Monitoring Report No.3 submitted to the Committee (report 12/52 refers), together with an additional £42,000 in 2012/13 reflecting the additional allocation of Capital Grant from the Scottish Government. The meeting also approved a revised five year Housing Investment Programme for the 5 years to 2016/17; the approved budget over the 5 years to 2016/17 totalled £67,998,000.
- 1.2 The Special Council meeting on 14 February 2013 approved a further £3,544,000 for the Commercial Property Investment Programme in 2013/14 (£944,000) and 2014/15 (£2,600,000). These works are funded from additional Revenue Contributions over the two years. The expenditure proposals relating to this funding will be reported to a future meeting of the Enterprise & Infrastructure Committee.
- 1.3 The Special Council Meeting on 14 February 2013 also approved Composite Capital Budgets for 2017/18, 2018/19 and 2019/20, which will be included in future monitoring reports.
- 1.4 This report advises of expenditure to 28 February 2013 and the latest estimate of the projected outturn for each of the years to 2016/17 for both programmes.

2. PROPOSALS

- 2.1 The current estimated total capital resources available in 2012/13, 2013/14, 2014/15, 2015/16 and 2016/17 amount to £31,299,000, £54,984,000,

£64,400,000, £43,611,000 and £37,244,000 respectively with the constituent elements being summarised at Appendix I. Movements from the previous estimates approved on 13 February 2013 are also summarised at Appendix I, with the significant points detailed below.

- 2.2 A review of anticipated Capital receipts has been undertaken since the last monitoring report. As a result, £17,000 of General Fund disposal receipts have been re-phased from 2012/13 to later years in line with the general property disposal programme.
- 2.3 The Local Government Finance Circular 1/2013 issued on 7 February 2013 included Scottish Government allocations of Barnett consequential for the period 2012-15. The additional General Capital Grant funding for the years 2012/13 and 2013/14 for this Council amounts to £42,000 and £1,451,000 respectively. A condition of the additional funding is that it is to be used for projects which are 'ready to go' but are not already funded from existing capital programmes. The 2012/13 additional funding was allocated to further drainage works required for the Kinnoull Primary School Upgrade Project at this Committee meeting on 13 February 2013. It is proposed to allocate £400,000 from the 2013/14 allocation to the A9/A85 Road Junction Improvements as discussed at Section 3.3.3 and 3.3.4 below. Therefore, £1,051,000 in 2013/14 remains unallocated and options for use of the funding will be presented at a future meeting of this Committee.
- 2.4 There are a number of projects included within Service Revenue Budgets which are funded from General Capital Grant. A review of these projects has identified an additional projected £205,000 underspend within TACTRAN projects in the current financial year. It is therefore proposed to utilise an additional £205,000 of the Capital Grant to fund the Capital Budget, and to apply an equivalent amount of Capital Grant to the Revenue Budget in 2013/14.
- 2.5 The movement within Third Party Contributions reflects the proposed rephasing of Community Greenspace income budgets as highlighted within Section 3.3.6 of this report.
- 2.6 The Council approved additional funding towards various priority projects on 19 December 2012 (report 12/586 refers) including £3,000,000 of funding from Council Reserves. The Reserves funding has now been allocated to the Redevelopment of Perth Theatre project, which was reflected in the Education & Children's Services Revenue Budget approved at the Council meeting on 14 February 2013. The corresponding Capital budget adjustments, which merely reflect presentational changes, are now included within Appendix II.
- 2.7 In addition to the additional Revenue Contributions approved by the Council on 14 February, as detailed in Section 1.2 above, further Revenue Contributions of £8,000 are proposed for works under the Modernising Primaries Programme in 2012/13 and a further £132,000 in 2013/14 for the Blairgowrie Town Centre Regeneration project.

- 2.8 The only receipts carried forward between years are unused receipts on the Commercial Property Investment Programme. There has been no change to income and expenditure projections and the Commercial Property disposal receipts projected to be carried forward at the end of 2016/17 remain at £1,326,000.
- 2.9 The projected Borrowing Requirement in 2012/13, which is effectively the balancing item for resources, is £17,964,000 which is £473,000 less than the previous Borrowing Requirement of £18,437,000. This reduction is a combination of several factors, including anticipated movements in expenditure, receipts, and resources carried forward as described throughout this report. The total Borrowing Requirement in the subsequent years 2013/14 to 2016/17 has increased by £474,000 to £130,297,000. All movements in the Borrowing Requirement are shown in the Proposed Budget Adjustment column within Appendix II.
- 2.10 When considering the Capital Budget over the five years together, the Borrowing Requirement has therefore only increased by £1,000 between 2012/13 and 2016/17 which is summarised in the following table:

	2012/13	2013/14	2014/15	2015/16	2016/17	Total
	£'000	£'000	£'000	£'000	£'000	£'000
Decrease/(Increase) in General Fund Disposal Receipts (Section 2.2)	17	(13)	0	0	(4)	0
Decrease in Prudential Borrowing Almondbank House (Section 3.2.4)	(2)	0	0	0	0	(2)
Increase in Prudential Borrowing Wheeled Bin Replacements (Section 3.3.7)	3	0	0	0	0	3
Movements arising from re-phasing of expenditure and receipts (Appendix II)	(491)	360	(71)	183	19	0
Increase/(Decrease) in New Borrowing Requirement	(473)	347	(71)	183	15	1

- 2.11 As a result of all the movements detailed above, the total projected Capital Budget resources and gross project expenditure amounts to £231,538,000 over the five years 2012/13 to 2016/17.

3. COMPOSITE PROGRAMME CAPITAL EXPENDITURE TO 28 FEBRUARY 2013

3.1 Total expenditure (net of grants and contributions) to 28 February 2013 on the Composite Capital Programme amounts to £18,560,000, total Grant received amounts to £5,431,000, whilst total capital receipts received amount to £324,000. A comprehensive monitoring exercise has been carried out, and is detailed at Appendix II, with the most significant features discussed below.

3.2 Education and Children's Services

3.2.1 Expenditure to 28 February 2013 amounts to £5,160,000.

3.2.2 As noted in Section 2.6 above, the Contribution from Reserves in the Capital Budget has now been allocated against the Redevelopment of Perth Theatre, and is consistent with the Revenue Budget approved by the Council on 14 February. This merely represents a presentational change and has no impact on the overall programme.

3.2.3 There are some further proposed budget movements between years. The only movement of significance is a rephrasing of the projected level of expenditure on the Invergowrie Primary School Upgrade project. The latest estimate from the contractor reflects an increase of £138,000 in expenditure in 2012/13 which has been brought forward from 2013/14. It is also proposed to transfer £152,000 from the Modernising Primaries Programme in 2013/14 to the Glenlyon Primary School Upgrade budget, in line with the revised design costs. The programme also includes a proposed £8,000 Revenue Contribution for additional works at Robert Douglas Memorial Primary School within the Modernising Primaries Programme.

3.2.4 Works within the Prudential Borrowing Programme were essentially completed last year, with only minor residual works anticipated in 2012/13. Accordingly it is proposed to reduce the borrowing required by £2,000 for works at Almondbank House in line with the final estimate of costs required.

3.2.5 All the above adjustments, together with other smaller minor movements, are reflected within Appendix I and II.

3.3 The Environment Service

3.3.1 Expenditure to 28 February 2013 amounts to £13,235,000.

3.3.2 The Executive Director (Environment) has undertaken a review of the current five years Environment Service programme and proposes to make several adjustments to project budgets, in line with revised programmes of work. These are all detailed at Appendix II, and the majority of adjustments relate to budget movements from 2012/13 and 2013/14.

- 3.3.3 At its meeting on 19 December 2012 the Council agreed to support the requirement for A9/A85 Road Junction Improvements in principle until the level of funding from the Scottish Government and other developer contributions is known (report12/586 refers). The Council also instructed the Executive Director (Environment) to continue dialogue with Transport Scotland to secure additional funding towards the project. Dialogue is continuing with a view to developing a full funding strategy for the project for consideration by this Committee. However, in the interim, in order to progress the project, it is necessary to fund approximately £400,000 of ground investigation and other consultancy costs.
- 3.3.4 It is proposed that the Council funds these costs from an element of the £1,451,000 of additional General Capital Grant allocated to the Council as “Barnett consequentials” in 2013/14 (see paragraph 2.3 above). This proposal is predicated on the assumption that the expenditure ultimately meets the definition of “capital expenditure” as part of a fully funded capital project. In the event that this is not the case, however, the expenditure would be “revenue” in nature and it is proposed that it would be met from the Environment Service’s revenue budget for Economic and Physical Regeneration in these circumstances.
- 3.3.5 The programme of works for the Conservation of Built Heritage programme has been reviewed and it is proposed to transfer a total of £217,000 of the budget from 2012/13, 2013/14 and 2014/15 to later years in line with the phasing for projects at Aberfeldy, Abernethy, Errol and Kenmore. In addition, the Enterprise and Infrastructure Committee at its meeting on 20 March 2013 (report 13/123 refers) approved a revised scheme of works for Blairgowrie Town Centre Regeneration. The report also included proposed budget adjustments, subject to approval by this Committee, and these proposed adjustments have been included in Appendix II of this report.
- 3.3.6 The proposed net budget movement from 2012/13 to 2013/14 within the Community Greenspace programme amounts to £197,000 and comprises budget movements over a number of projects for which works will complete in 2013/14. Included within these is the Crieff Macrosty Park project and a review of the programme of works to complete the park redevelopment has identified some saving on the original estimated cost. It is proposed that the savings are used to fund the purchase and installation of new shutters for the park pavilion, and that the expenditure and income budgets are rephased from 2012/13 to 2013/14 as the works are anticipated to be completed early in 2013/14; the proposed budget movements are included within Appendix II.
- 3.3.7 The proposed budget movement within the Prudential Borrowing programme relates to a small increase of £3,000 in borrowing in 2012/13 for additional Wheeled Bin purchases.
- 3.3.8 All the above adjustments, together with other smaller minor movements, are reflected within Appendix I and II.

3.4 Housing and Community Care – Community Care

3.4.1 Expenditure to 28 February 2013 amounts to £165,000.

3.4.2 The Executive Director (Housing & Community Care) proposes to make several adjustments to the programme to reflect movements arising due to the rephasing of works. The resulting net budget movement from 2012/13 to 2013/14 is £108,000 and all proposed adjustments are detailed within Appendix I and II.

4. HOUSING INVESTMENT PROGRAMME

4.1 Net expenditure to 28 February 2013 amounts to £5,574,000.

4.2 The Executive Director (Housing & Community Care) proposes to make several adjustments to the programme. These are all detailed at Appendix III and the most significant adjustments are summarised below.

4.3 The review of projects included within the Standard Delivery Plan has resulted in a total £405,000 budget movement from 2012/13 to 2013/14. The most significant movement relates to the Controlled Door Entry and Central Heating and Rewiring Works programmes. A delay to the commencement of Controlled Door Entry works has resulted in a proposed transfer of £171,000 of the 2012/13 budget to 2013/14 in line with the revised programme of works. The delay in delivery of storage heaters has impacted upon the Central Heating and Rewiring Works programme and it is therefore proposed to transfer £96,000 of the budget from 2012/13 to 2013/14 accordingly.

4.4 A further review of Council House New Build projects has resulted in the reprofiling of the programme of works and it is proposed to transfer £169,000 of the budget from 2012/13 to 2013/14 in line with the revised work programme for the projects. In addition, the review of final costs for the Alyth and Pitlochry New Build projects has resulted in a net £17,000 increase and it is proposed that the additional cost is offset against the additional income noted within Section 4.6.

4.5 There are a number of property acquisitions for the Increase in Council Housing Stock programme which will now conclude in the new financial year and it is therefore proposed to transfer £415,000 of the budget from 2012/13 to 2013/14 in line with revised settlement dates.

4.6 The review of Housing Investment Programme income reveals that the current year forecast for receipts arising from 'Right to Buy' Council house sales is slightly higher than previously anticipated and it is proposed that the 2012/13 Capital Receipts budget is increased by £64,000 in line with income received to date. In addition, it is anticipated that the 2012/13 Housing Revenue Account (HRA) contribution towards the programme will be higher than previously anticipated and it is proposed to increase the CFCR budget by £55,000 accordingly.

- 4.7 The proposed adjustments noted above reduce the 2012/13 net borrowing requirement by £1,242,000 followed by an increase of £1,140,000 in 2013/14. The total Housing Investment Programme net borrowing requirement over the 5 year programme therefore reduces to £46,248,000 which is £102,000 less than approved by this Committee on 13 February 2013.

5. RENEWAL & REPAIR FUND

- 5.1 Detailed at Appendix IV is the 2012/13 approved budget and the projected outturn for the Renewal & Repair Fund. There are small movements on the projected expenditure on the Fund compared to the last report. These will be carried forward to be utilised in 2013/14.
- 5.2 Also detailed at Appendix V is the 2013/14 proposed budget for the Renewal & Repair Fund. The proposed expenditure of £10,000 on the Integrated Human Resources and Payroll System and the proposed expenditure of £108,000 on the Electronic Records Data Management System are the balance of resources for these projects previously approved and carried forward from prior years. An estimated £1,000 is available from interest income. The projected uncommitted balance in the fund at 31 March 2014 is £238,000.

6. CONCLUSION AND RECOMMENDATIONS

- 6.1 The revised Composite Capital Budget and Housing Investment Programme approved by this Committee on 13 February 2013 for 2012/13 to 2016/17 have been reviewed and updated.
- 6.2 The report reflects various proposed budget adjustments, with the new borrowing requirement for the Composite Programme showing an overall increase of £1,000 over the 5 years. There is an increase in the amount of General Capital Grant from the Scottish Government, with £1,051,000 in 2013/14 still to be allocated. The Housing Investment Programme net borrowing requirement has reduced by £102,000 over the 5-year programme as a result of an increase in income and CFCR projections, offset by a small increase in expenditure.
- 6.3 It is recommended that the Committee:
1. Notes the contents of this report
 2. Approves the proposed budget and monitoring adjustments to the five year Composite Capital Budget 2012/13 to 2016/17 set out in Sections 2 and 3 to this report and summarised at Appendices I and II.
 3. Approves the proposed budget and monitoring adjustments to the five year Housing Investment Programme Budget 2012/13 to 2016/17 set out in Section 4 to this report and summarised at Appendix III.

4. Approves the monitoring adjustments to the 2012/13 Renewal & Repair Fund Budget and the 2013/14 proposed Renewal & Repair Fund Budget set out in Section 5 to this report and summarised at Appendices IV and V.

Author(s)

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Approved

Name	Designation	Signature
John Symon	Head of Finance	John Symon
Date		

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Council Text Phone Number 01738 442573

PERTH AND KINROSS COUNCIL
STRATEGIC POLICY AND RESOURCES COMMITTEE
17 APRIL 2013

STRATEGIC POLICY AND RESOURCES COMMITTEE

Minute of Meeting of the Strategic Policy and Resources Committee held in the Council Chambers, Fourth Floor, Council Building, 2 High Street, Perth on Wednesday 17 April 2013 at 10.00am.

Present: Councillors I Miller, A Grant, B Band, P Barrett, A Cowan (substituting for A Livingstone), D Cuthbert, D Doogan, Provost L Grant, A MacLellan, D Pover, M Roberts, A Stewart, B Vaughan, W Wilson and A Younger.

In Attendance: B Malone, Chief Executive; D Burke, Depute Chief Executive and Executive Director (Housing and Community Care); J Fyffe, Depute Chief Executive and Executive Director (Education and Children's Services); P Graham and R Goldsmith (both Education and Children's Services); B Renton (the Environment Service); K Fraser and J Walker (both Housing and Community Care); D Henderson, J Somerville, J Symon and G Taylor (all Chief Executive's Service).

Apologies for Absence: Councillors J Kellas and A Livingstone

Councillor I Miller, Convener, Presiding.

211. DECLARATIONS OF INTEREST

There were no Declarations of Interest made in terms of the Councillors' Code of Conduct.

212. MINUTES OF PREVIOUS MEETINGS

(i) Strategic Policy and Resources Committee

The minute of meeting of the Strategic Policy and Resources Committee of 13 February 2013 (Arts. 78-86) was submitted, approved as a correct record and authorised for signature.

(ii) Property Sub-Committee

The minute of meeting of the Property Sub-Committee of the Strategic Policy and Resources Committee of 9 January 2013 was submitted and noted (**Appendix I**)

(iii) Appeals Sub-Committee

The minute of meeting of the Appeals Sub-Committee of the Strategic Policy and Resources Committee of 29 January 2013 was submitted and noted (**Appendix II**)

(iv) Employees Joint Consultative Committee

The minute of meeting of the Employees Joint Consultative Committee of the Strategic Policy and Resources Committee of 27 September 2012 was submitted and noted. (**Appendix III**)

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(v) Corporate Health, Safety and Wellbeing Consultative Committee

The minute of meeting of the Corporate Health, Safety and Wellbeing Consultative Committee of the Strategic Policy and Resources Committee of 3 December 2012 was submitted and noted. (**Appendix IV**)

213. REVENUE BUDGET 2012/13 – MONITORING REPORT NO 4 (Art. 80)

There was submitted a report by the Head of Finance (13/150) providing an update on (1) progress with the 2012/13 General Fund Revenue Budget based on the January 2013 ledger (updated for any subsequent known material movements); (2) the projected financial position of the Housing Revenue Account, proposed adjustments to the 2013/14 General Fund Revenue Budget; and (3) legislative changes within Local Taxes.

Resolved:

- (i) The contents of Report 13/150 be noted.
- (ii) The adjustments to the 2012/13 Management Revenue Budget, detailed in Appendix 1 and Sections 2, 3 and 4 of Report 13/150, be approved.
- (iii) The individual Service virements, summarised in Appendices 2 and 3 to Report 13/150, be approved.
- (iv) The adjustments to the 2013/14 Council Approved Budget, as set out in Section 5 of Report 13/150, be approved.

214. COMPOSITE CAPITAL BUDGET AND HOUSING INVESTMENT PROGRAMME 2012/17 – MONITORING REPORT NO 4 (Art. 81)

There was submitted a report by the Head of Finance (13/151) (1) providing a summary position to date of the Composite Capital Programme and Housing Investment Programme for 2012/13 to 2016/17; (2) seeking approval for adjustments to the Programme; and (3) providing a proposed Renewal and Repairs Fund Budget for 2013/14.

Resolved:

- (i) The contents of Report 13/151 be noted.
- (ii) The proposed budget and monitoring adjustments to the five year Composite Capital Budget 2012/13 to 2016/17, as set out in Sections 2 and 3 of Report 13/151 and summarised in Appendices I and II thereto, be approved.
- (iii) The proposed budget and monitoring adjustments to the five year Housing Investment Programme Budget 2012/13 to 2016/17, as set out in Section 4 of Report 13/151 and summarised in Appendix III thereto, be approved.
- (iv) The monitoring adjustments to the 2012/13 Renewal and Repair Fund Budget and the 2013/14 proposed Renewal and Repair Fund Budget as set out in Section 5 of Report 13/151 and summarised in Appendices IV and V thereto, be approved.

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215. PERTH AND KINROSS COUNCIL CORPORATE WORKFORCE PLAN 2013-18

There was submitted a joint report by the Depute Director (Housing and Community Care) and the Head of Human Resources (13/152) (1) presenting the Perth and Kinross Council Corporate Workforce Plan for the period 2013-18; (2) providing an analysis of the context and key workforce planning challenges facing the Council over the next 5 years; and (3) advising of an action plan that had been developed under a number of themes which provide corporate leadership on the approach to workforce planning in response to transformation of services, public sector reform and modernisation of working practices.

Resolved:

- (i) The Corporate Workforce Plan 2013-2018, attached as Appendix 1 to Report 13/152, be approved.
- (ii) Progress on workforce planning actions be reported through the annual report on "Securing Our Future Through Our People".

216. UPDATE ON SOLACE BENCHMARKING PROJECT

There was submitted a joint report by the Depute Director (Environment) and the Head of Finance (13/163) (1) providing a progress update on the SOLACE benchmarking project; and (2) presenting the suite of SOLACE indicators along with data for Perth and Kinross Council and comments provided by Council Services. It was noted that Report 13/163 would be considered by the Scrutiny Committee at a meeting to be held later in the day.

Resolved:

- (i) The progress made to date on the SOLACE benchmarking project be noted.
- (ii) The replacement of the Audit Scotland SPI's with the SOLACE indicators be noted.
- (iii) The explanations for variance provided by Council Services be noted.

217. ANNUAL REPORT FOR FOLLOWING THE PUBLIC POUND 2011/2012 (Art. 201/11)

There was submitted and noted a report by the Head of Legal Services (13/166) (1) describing the Council's arrangements for Funding External Bodies and Following the Public Pound; and (2) monitoring the Council's performance against the Code of Guidance for Funding External Bodies and Following the Public Pound for financial year 2011/12.

218. CONTRACTS AWARDED BY THE CHIEF EXECUTIVE'S SERVICE 1 JULY 2012 TO 31 DECEMBER 2012 (Art. 165/12)

There was submitted and noted a report by the Head of Finance (13/167) providing information on contracts awarded by the Chief Executive's Service from 1 July 2012 to 31 December 2012 under delegated authority, as detailed in Appendix 1 to Report 13/167.

PERTH AND KINROSS COUNCIL
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219. EQUALITY OUTCOMES

There was submitted a report by the Depute Chief Executive, David Burke, (13/168) advising that the Council and the Education Authority required to set and publish Equality Outcomes by 30 April 2013 to comply with the provisions of the Equality Act (Specific Duties) (Scotland) Regulations 2012. The report outlined the process by which the draft Equality Outcomes had been obtained and sought approval for the Outcomes.

Resolved:

The Equality Outcomes, as outlined in Report 13/168, be approved.

220. STATUTORY EQUALITY EMPLOYMENT MONITORING STATISTICS (Art. 433/12)

There was submitted a report by the Head of Human Resources (13/169) providing corporate level employment equalities data for the six month period to 30 September 2012 and an update since the last report dated 24 July 2012.

Resolved:

- (i) That the employment equality related data, as detailed in Appendix 1 to Report 13/169, had been published on the Council's website www.pkc.gov.uk be noted.
- (ii) The employment equality related data for the six month period to 30 September 2012 and the five year trend, as detailed in Appendix 2 to Report 13/169, be noted.
- (iii) The proposed plan to extend the current monitoring and reporting arrangements, as detailed in Appendix 3 to Report 13/169, be approved.

221. TIME OFF FOR MEDICAL APPOINTMENTS

There was submitted a report by the Head of Human Resources (13/170) seeking approval of the introduction of a policy covering Time Off for Medical Appointments.

Resolved:

- (i) The Time Off for Medical Appointments Policy, as detailed in Appendix A to Report 13/170, be approved.
- (ii) That paid time off be allowed for routine and non-emergency appointments which are unavoidable during working hours.
- (ii) That for paid time off for routine and non-emergency appointments be monitored for twelve months following implementation of the My View Leave Management functionality to quantify the lost time and that a further report be submitted to the Strategic Policy and Resources Committee.

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## Appendix 2

### DELIVERING INFRASTRUCTURE - BACKGROUND PAPER

January 2013

#### Introduction

This paper provides supporting information on the delivery of key infrastructure projects required to ensure that an effective housing and employment land supply can be maintained. In particular this background paper supports the responses contained in Schedule 4 nos.

20a TAYplan Spatial Strategy

20b Employment Land Strategy

20c Housing Land Strategy

20d Effectiveness of Strategic Sites

20e HMA Specific Housing Strategy Issues

21 Perth Strategic Development Area – West/North West Perth

22 Perth Area (within Core) Green Belt

23a Perth Area (within Core) Perth City Proposals

23b Perth Area (within Core) Perth City New Sites

24 Perth Area (within Core) Transport Infrastructure

25a Perth Area (within Core) North Settlements

25b Perth Area (within Core) East Settlements

25c Perth Area (within Core) South Settlements

25d Perth Area (within Core) West Settlements

26a Perth Area (out with Core) North Settlements

26b Perth Area (out with Core) East Settlements and Landward Sites

26c Perth Area (out with Core) South Settlements and Landward Sites

26d Perth Area (out with Core) West Settlements

27 Dundee Housing Market Area Settlements

Where appropriate the references to other Schedule 4s dealing with specific sites are also provided.

#### The Council Approach to Infrastructure Delivery

The Council recognises the importance of ensuring that the land allocations identified in the Local Development Plan are deliverable. Many factors affect the ability of a site to deliver its potential during the life of the Plan, including:-

1. Willing landowner
2. Physical constraints which do not inhibit the development of the site i.e. topography, ground conditions and flooding
3. Availability of services on site at reasonable cost i.e. power, water and drainage connections
4. Availability of support infrastructure i.e. education and transport infrastructure
5. Market demand
6. Availability of finance to the developer

Both market demand and the availability of finance are outwith the influence of the LDP as they are largely driven by the economic climate. The Council can improve the potential for a developer to obtain development finance by ensuring that the other criteria do not provide a constraint.

**Willing landowner** - From the outset the Council sought to ensure that there was a willing landowner for all the potential sites brought forward to meet both the housing and employment land requirement. This was done through the pre Main Issues Report call for issues and sites for consideration during 2009. With three exceptions, the Council is satisfied that all of the land required to meet the housing and employment land supply have willing landowners. The exceptions are site H41 in Fearnan, H43 in Kinloch Rannoch (these are discussed in Schedule 4 No. 29b) and E30 in Alyth (discussed in Schedule 4 No. 41).

**Physical constraints** - In identifying potential land allocations the Council has had regard to topography, ground conditions and flooding. Where there have been doubts over the suitability of the topography or ground conditions the Council has sought to exclude these sites from the LDP or include them within settlement boundaries but not identify them as sites contributing to the effective requirement.

SEPA have been a key contact with regard to flooding issues and with one exception the Council is satisfied that the potential for flooding will not inhibit the development of the identified sites. It is however recognised in the developer requirements for a range of sites that a flood risk assessment may still be required. This generally applies to sites with watercourses running through them, or near to watercourses, where there is the potential for localised flooding issues which may influence the detailed design but not undermine the overall deliverability of the site. The exception is employment site E11 in Ballinluig and this is discussed further in Schedule 4 No. 29a.

**Availability of services on site** - Through close liaison with key stakeholders, in particular Scottish Water, the Council is satisfied that the identified sites are serviceable although as noted in the tables contained in Appendix 1 below, for certain sites, further investigation is required.

**Availability of support infrastructure** – Over the past 20 years Perth & Kinross has been one of the fastest growing areas of Scotland. This has affected support infrastructure capacity, in particular capacity in schools, transport and wastewater treatment.

From the early 1990's through to mid 2006 a lack of drainage capacity was the major constraint within Perth & Kinross. This constraint was largely lifted by the shift in Scottish Government policy for the Scottish Water funding programme. This proactive approach to funding growth identified in the Development Plan has allowed, through discussions with Scottish Water, the identification of effective sites. It is however recognised that for some sites where major improvements are required, works may be required in advance of development. Where this is the case the Draft Action Programme identifies key actions. In their response to the Proposed Plan Scottish Water advise that they "support Perth and Kinross Council and will work with the Local Authority and all interested parties to enable development. We have had continuous engagement throughout the process and welcome the chance to continue this working relationship".

By 2000 capacity in the school estate was becoming stretched and the availability of housing land was being constrained. The Council began an ambitious programme of improving the school estate aligned with the development pressures identified in the Development Plan. The first phases were the development of a new all through community school in Auchterarder to support the major expansion of the settlement and the development of a new primary school in Abernethy which was also programmed for major expansion. This was followed by the Council's Investment in Learning programme which commenced in October 2007 and, through a Public / Private Partnership, delivered 2 new all through campuses, two secondary school and 3 primary schools. These were completed in 2011. Recognising that this was an ongoing issue which could not be addressed by the Council on its own, the Council introduced a developer contributions policy in May 2009 to assist in the delivery of primary school capacity. This is discussed further below.

The rapid growth of Perth & Kinross was also placing pressure on transport infrastructure. This was particularly evident in and around Perth where in addition to delays caused by congestion, the degraded air quality as a result of traffic congestion resulted in Perth being declared an Air Quality Management Area in 2006.

It has been appreciated for some time that the major approaches to Perth suffer significant traffic congestion. It is also clear from general observations and studies carried out that while there is an existing problem, it was also known that emerging from the adopted Local Plan at the time and subsequent new Local Development Plan, Perth would be subject to significant future growth pressure.

By 2008 there were significant pressures from various parties interested in individual parcels of land in the area and all were intent on developing individual solutions in terms of access and the general transport impact of their particular development. It was the Council's view that this piecemeal, isolated approach was unsustainable and was clear that a more cohesive and cumulative strategic approach was required. Funding was provided through Council budgets to start this process.

This approach was seen as essential to not only help address the existing traffic issues in and around Perth, but provide a clear strategic infrastructure solution that would cater for all the various development interests expected to emerge during the period of the next development plan and beyond. It was evident that while major strategic infrastructure improvements, which would likely involve multiple landowners and the Trunk Roads agency, would be required to address the traffic problems. In addition, it would be difficult for individual applicants or developers to implement the required strategic solution.

One of the main reasons for this front end approach by the Council was the requirement to use suitable traffic modelling, likely to be at a Perth wide scale. There is a realisation that development within the wider Perth area will have potential significant effects on other parts of the road network including the city centre where there are already problems caused by current levels of traffic. In response to this the Council have developed and maintained a traffic modelling capability. It was therefore appropriate that the Council took on the task of developing an integrated transport appraisal of issues and potential solutions to Perth's current and future transport needs.

## Major Transport Studies:

There were two major transport studies carried out on behalf of the Council. The first and primary study was a Perth wide exercise looking at the transport network, both within the city boundary and the immediate hinterland. This examined how it currently operated and how, more importantly, it was likely to perform with the forecast assumptions in the Local Development Plan. Against a background of significant potential population growth the current network in Perth, without any enhancements, will suffer severe operational difficulties. There will not be the capacity to cater for the anticipated growth forecasts. This as would be expected will, or would, ultimately lead to an increase in delays, congestion and adverse impacts on an existing AQMA.

The Perth Traffic and Transport Issues: STAG Report was presented to the Council's Enterprise & Infrastructure Committee 26 August 2009. The main findings from this report were the need to provide a new northern route around Perth (referred to as the Cross Tay Link Road: CTLR). This allowed the opportunity to provide, as part of a wider integrated strategy, significant improvements to the transport network within the city centre. The Committee remit was to take forward development work on a preferred route for the CTLR and investigate in more detail the range of measures that could be implemented in the city centre on the basis of the significant reduction in traffic levels. This work was reported to a Special Meeting of Perth & Kinross Council on 10 Jan 2012 as a key component in a wider report on the Local Development Plan; Shaping Perth's Transport Future.

At the same time as the wider Perth strategic study was taking place, there was also the more detailed piece of work looking at the area to the west of Perth. This area already had significant operational issues and was coming under increasing pressure from development. While it was acknowledged that the transport infrastructure issues surrounding the A9/A85 were a current constraint, to try to assist in bringing forward proposals in an integrated way, a detailed study of roads and transport in this area was carried out. This study was entitled Perth Western Edge: Development Impact Appraisal Report.

It was vital that any emerging solutions from this work fitted into and complemented the wider strategic study. The outcomes of this work was presented to the Council's Enterprise & Infrastructure Committee: North West Perth Expansion Area Study, 26 August 2009. This report also outlined potential Development Options for a range of land uses and included a review of potential funding mechanisms to deliver the range of infrastructure required for the area.

The outcome of this work from a transport perspective was an identified need to provide a new grade separated junction with associated links. This would be a replacement for the current sub standard A9/A85 junction at Newhouse Road, and includes a full standard dumbbell junction arrangement over the A9 with a new northerly route around McDiarmid Park. On the basis of this report officers were remitted to take forward more detailed work on developing this new junction.

The extent of the works involved in the full range of “Perth Transport Futures” projects ranged from the Cross Tay Link Road and A9/A85 junction upgrade to more minor traffic management measures in Perth city centre. The final costs for each of these packages have not yet been established but the current working estimates are as follows:

| Element                                                         | Cost £(million) |
|-----------------------------------------------------------------|-----------------|
| Cross Tay Link Road                                             | £90m            |
| Park and Ride                                                   | £4m             |
| Public Transport, City Centre improvements, walking and cycling | £23m            |
| A9/A85 Crieff Road junction improvements                        | £15m            |
| Friarton Link Road                                              | £3m             |
| <b>Total</b>                                                    | <b>£135m</b>    |

The current estimate cost of £135m cannot be funded by the Council alone. To place the funding of these improvements solely on the development industry would also not be feasible. This Supplementary Guidance does not seek to recoup all of the costs but seeks a fair and reasonable contribution related in scale and kind spreading the burden across all new development within the Perth sub area.

**Developer contributions policy basis and development** - It is transport and education projects which form the critical infrastructure constraints. These must be addressed to ensure the sites identified within the LDP are effective or capable of becoming effective during the life of the Plan. The strategic scale of these projects supports multiple sites and in most cases they are multi million pound projects. It is unlikely such projects could be financed through up front provision by the development industry, working individually or indeed in combination. Accordingly the Council is committed to working with the development industry, by taking the lead in the provision of these key projects and seeking retrospective and appropriate developer contributions to assist in their funding. This approach has been in development since well before the onset of the current economic difficulties in late 2007.

In line with Scottish Government Circular 12/1996 Planning Agreements and ‘Making it Happen Policy 1’ of the Perth and Kinross Structure Plan 2003 the Council has required new developments to mitigate their impact on infrastructure determining each contribution on an individual basis. Large scale developments such as the new village at Oudenarde and the development framework at Auchterarder have the economies of scale to finance the extensive infrastructure requirements. The cumulative impact of small developments on infrastructure, combined with the reduction in Council finance and the onset of the financial downturn, meant that available infrastructure capacity was being used up. In addition, where a constraint was identified, the mitigation costs rendered a number of developments non-viable. In September 2008 the Council agreed to consult on policies for developer contributions towards increasing primary education capacity and other infrastructure where required. These policies sought to spread the burden of infrastructure costs across a wide range of development therefore reducing the impact on any single development. These policies were adopted in May 2009 and a subsequent policy on contributions towards the A9 junctions was approved in August 2009.

The Main Issues Report highlighted under Key Issue 21 that there are still significant challenges in funding the required infrastructure. Various funding options are identified and the significant importance of the Cross Tay Link being funded partly through developer contributions outlined.

Government policy was revised under Circular 1/2010 Planning Agreements and in line with TAYplan Policy 8: Delivering the Strategic Development Plan and Proposed Plan Policy PM3: Infrastructure Contributions the Council undertook to review its existing policies and to create Supplementary Guidance.

The first area of Supplementary Guidance 'Developer Contributions' was consulted on with the Proposed Plan and adopted by the Council in November 2012. Supplementary Guidance on Transport Infrastructure Contributions has been consulted on in late 2012. This sets out the basis on which Perth and Kinross Council will seek to secure contributions from new development towards the cost of meeting transport infrastructure improvements necessary to reduce congestion, improve air quality and benefit the local and regional road network.

During the development of this Supplementary Guidance Circular 1/2010 has been reviewed under Circular 3/2012 Planning obligations and Good Neighbour Agreements. Proposed Plan Policy PM3 still meets the principles of the revised Circular. However through the consultation on Transport Infrastructure Contributions a number of issues were raised relating to the compatibility with the principles of the Circular. The issues raised have been reviewed and appropriate modifications made to address the concerns. This Supplementary Guidance will be considered by Committee in early June 2013.

### **Key Infrastructure Constraints**

As noted above the proactive approach of Scottish Water to the provision of both Wastewater Treatment and Water capacity has generally removed these constraints. It is however noted in the Proposed LDP and Draft Action Programme that, for certain sites, there may be a time lag in the release of certain sites to permit the construction and operation of a growth project.

It is transport and education projects which form the critical infrastructure constraints which must be addressed to ensure the sites identified within the LDP are effective, or capable of becoming, effective during the life of the Plan. The key transport and education projects are discussed further below, identifying progress to date.

### **Perth Transport Futures Projects -**

Modelling work has highlighted that the current transport network in and around the city, without any enhancements, will not be able to accommodate all of the predicted growth, with analysis showing only 30% can be accommodated. The effective land supply with planning consent has taken up the vast majority of available capacity. Much of the current problem has been as a result of a piecemeal isolated approach to single developments, particularly the numerous smaller scale applications which can cumulatively have a significant impact on the operation of the network. This has to large extent been the rationale for the development of a contributions protocol which captures impacts from all applications.

**The Cross Tay Link Road** – this project will be the biggest single transport infrastructure scheme in Perth for over 30 years. The project is seen as vital to creating the available capacity in the transport network to allow the delivery of the various sites identified in the new LDP. It is also key to addressing some of the current problems in the network, particularly in the city centre and also at the key junctions at Broxden and Inveralmond.

In respect to the Cross Tay Link there has been a significant amount of work done to date. A preferred corridor for the new route was identified and approved at the Council meeting in January 2012. Funding has been allocated via TACTRAN's Programme which is allowing the detailed technical work to progress. In relation to funding a project of this scale, officers are investigating options for the delivery of the scheme. It is anticipated a range of sources will be required including contributions from the development industry through a new transport contributions protocol.

Modelling work has highlighted that the completion of the new Cross Tay link will reduce traffic volumes in the city centre by approximately 20%, a reduction similar to traffic reduction associated with the school holidays. Importantly this reduction is anticipated to allow the opportunity to develop major public realm improvements in the central area of the city, including better footways, cycleways and conditions for public transport.

**The A9/A85 Junction Upgrade** - this project received planning consent in May 2012 and work is currently progressing in setting out a procurement and project management strategy. This project will significantly improve conditions in and around the Newhouse Road area of the city and importantly open up development opportunities at Inveralmond and Bertha Park. The project will also connect to the Cross Tay Link Road and allow more options for traffic north and west of the city, removing the need to pass through the city centre.

Significant levels of funding have already been allocated to this scheme and the Council at its meeting of December 2012 made a commitment to examine approaches to funding the capital costs of the scheme.

**Park and Ride sites** - are also seen as key to the overall transport strategy for the area around the city. It is intended, subject to completion of the necessary land acquisition, to construct a new facility in the Walnut Grove area, potentially allowing commuters from the Carse and Dundee areas an alternative option to taking the car into the city centre. There is funding available in the Council's Capital Programme to progress the land acquisition for the scheme and subject to this it is anticipated a planning application will be lodged in 2013. Whilst work is ongoing about how to deliver the capital costs of the scheme, it is of note that a significant revenue subsidy will be required. However as part of a wider city transport strategy the park and ride schemes are seen as crucial to the operation of the transport network.

It is also ultimately hoped to construct a new facility to the north of Inveralmond on the A9, likely to be constructed in and around the location of the new Cross Tay link and the major future housing site at Bertha Park. This work will be taken forward as part of a future masterplan for the Bertha Park area.

**School Estate Overview** - The general decline in school pupil numbers which Scotland as a whole is experiencing is not a trend that is being mirrored in Perth and Kinross. Further, the different localities within the Council area show different trends in respect of the future population levels at various ages. Perth and Kinross has one of the largest projected gains in population compared to other authorities, in the period 2006-2031. GROS population projections for Perth and Kinross show an increase of 22% for this period with the 0 to 15 age group projected to increase by 14%.

The demographic pressure feeding into schools has resulted in a third of Perth and Kinross Council schools operating at 81% occupancy or above, with 1.2% operating at more than 100% occupancy. At 80%, some but not all of the primary streams are full or approaching it, and the ability to accommodate primary pupils of any age to classes may be compromised. Where schools are projected to reach this 80% threshold, the Developer Contributions Supplementary Guidance is applied.

In general, the primary schools which have sufficient capacity to accommodate additional numbers are not within areas with a market to support further housing. In the urban area, particularly Perth City, the current location of schools reflects the historical spread of the population, rather than meeting the needs of communities that now exist following considerable housing development in some parts of the city.

A major exercise to review the school estate has been undertaken to ensure that not only are the schools we have fit for providing a 21<sup>st</sup> Century education from, but just as importantly, are in the right locations and reflect the current population dispersal rather than the historical trends, within the major population settlements across the Council area.

In October 2007, the Investment in Learning programme was agreed and this multi million pound programme accommodates over one quarter of the pupil population in modern accommodation and provides an extensive range of community facilities. This programme was completed with the opening of the North Inch Community Campus in October 2011.

### Primary School

The monitoring and upgrading of the school estate is an ongoing process. Through the Capital Programme a number of primary school upgrades have been completed in recent years with further projects ongoing and feasibility studies underway. Where required these projects include the provision of additional classroom space to meet future needs. Projects which are underway or recently completed can be found at Errol Primary school which was completed in August 2009 and combined refurbishment of the existing building with an extension to create additional capacity to support planned developments at that time. Unfortunately, it was not possible to future proof the site beyond the development of 7 classrooms. The former petrol station and garage land adjacent to the current school subsequently became available and was purchased in 2011 with a view to utilising this area for the future expansion of Errol Primary School to accommodate the projected rising roll.

Perth and Kinross Council announced in February 2012 that an additional £20 million was to be invested in the school estate. This was to be targeted at life expired buildings, practical teaching areas and sports facilities and to tackle the impact of capacity pressures in schools arising from the Council's growing population.

Scotland's School for the Future Programme is funded by Scottish Government (£1.25bn) through the Scottish Futures Trust. Perth and Kinross Council was chosen to benefit from grant funding of £2.467m towards the cost of replacing Invergowrie Primary School. The remaining cost will be funded from the Capital Programme.

Abernethy Primary School capacity is also being increased through a £5 million project which also includes the installation of a Multi Use Games Area. This project will be complete by August 2013.

A new Primary school has been included in the Capital Plan at Crieff on a site purchased in December 2011, adjacent to Strathearn Community Campus. It is proposed to replace the existing school with the new facility whilst also giving consideration to potential pupils from new housing developments. £14.006 million has been allocated to this project and the design is underway with completion due in 2014/15.

To support the new village at Oudenarde, the provision of a new primary school was required. The developer agreed to build this as part of the development but with the onset of the financial downturn this proved to be non viable. To support this major development, the Council has agreed to fund and build a new primary school within the new village with the developer making a significant contribution payable upon the sale or development of each area of land. This agreement is subject to the completion of a draft S75 agreement for the payment of phased contribution by the developer towards a proportion of the capital cost and allows the early provision of a new school while supporting future development needs.

Design development is underway to replace the existing Oakbank Primary School. £8.5m is contained within the current capital programme for this project.

Alyth Primary School has been highlighted through the asset management process as a largely life expired property requiring major investment. £8.8m is contained with the current capital programme for this project. Options will be considered which will deliver the best learning experience, while being sustainable, cost effective and accommodating future demand.

The school roll at Inchtute Primary School is projected to rise as a result of the predicted numbers of pupils from known house building. A feasibility study has been completed to examine options and design development is currently underway.

Funding is contained in the current capital programme to upgrade Glenlyon Primary School with the provision of flexible general purposes spaces and office accommodation.

Works are progressing to extend Rattray Primary School to provide flexible spaces for the delivery of services for children and families, and for community use. £2.609m is contained in the capital programme for this project.

An extension is planned for Kinnoull Primary School to replace the old gym and the current single storey modular building along with upgrade of toilets. Design development is currently underway and funding is contained within the current capital programme.

To reflect future primary education requirements it has been identified that Luncarty primary school will require an extension. To meet future needs in Kinross and Milnathort a site has been identified for a new primary school. Both of these projects do not yet have funding allocated to them but initial work is ongoing to ensure future development needs can be supported.

### Secondary School

The Secondary School upgrade programme was outlined in 2007. This ongoing programme of investment is upgrading facilities through the existing secondary school estate. It has provided improved sports facilities at both Perth High School and Perth Academy and it has upgraded infrastructure and practical rooms at Perth Grammar School.

Phase 2 of this project at Blairgowrie High School was completed in 2012 with the formation of the Hub including substantial new Additional Support Needs facility incorporating several spaces for teaching, therapy and life skills. It has provided improved sports facilities at Perth High School with the provision of an all weather pitch and works to progress the proposed extension of the sports hall is currently underway.

Works are planned to upgrade sports facilities at Perth Academy and to upgrade infrastructure and practical rooms at Perth Grammar School.

To support the growth of Perth the need for a new secondary school to the north of Perth was identified. The Scottish Government Schools Investment programme requested bids for phase 3 of the Scotland's Schools for the Future programme in 2012. Perth and Kinross Council's bid for the secondary element of a new all through school to the north of Perth was successful and two thirds of the funding for this was allocated (£15.32m). The remaining third has been agreed through the Council's Capital Programme 2017 – 2020. The Council has agreed in February 2013 that the preferred location of the new all through school, subject to the required statutory consultation process, will be H7 Bertha Park.

### **Analysis of infrastructure and other constraints for identifies sites**

Appendix 1 contains a series of tables by LDP sub area identifying the infrastructure and other constraints for each site within the Plan.

## **Conclusion**

The information contained in this paper demonstrates that the Council has taken account of the infrastructure and other constraints likely to impact upon the effectiveness of the sites identified in the Plan. It further demonstrated that the Council has taken steps to implement plans to address the critical constraints making significant progress in a range projects. The Council accepts there is much work to be done over the Plan period. The development of Policy PM3 on Infrastructure contributions and the associated supplementary guidance demonstrates the Council's commitment to working with the development industry to deliver up front infrastructure financed in part through retrospective contributions. This approach is considered vital to ensuring development is economically viable.

### Site Constraints by Sub Area

#### Perth Area

| Settlement           | Type | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|----------------------|------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                      |      |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Abernethy Employment |      | E4  | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner                                   |
| Abernethy Hou        | sing | H8  | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Abernethy Hou        | sing | H9  | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Abernethy Hou        | sing | H10 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |

| Settlement         | Type          | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|--------------------|---------------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                    |               |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Balbeggie Hou      | sing          | H13 | No          | No - No capacity constraint identified.      | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |
| Bridge of Earn     | Housing       | H14 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |
| Burrelton/Woodside | Employment E8 |     | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Burrelton/Woodside | Hou sing      | H16 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009.                                                                                                                                                 | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Burrelton/Woodside | Hou sing      | H17 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009.                                                                                                                                                 | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |

| Settlement         | Type       | Ref  | Constraints                                       |                                              |                                                                                                                                                                                 |                                                                          |                                                   |                                                                 |
|--------------------|------------|------|---------------------------------------------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                    |            |      | Drainage                                          | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                 | Flooding                                          | Land ownership                                                  |
| Cromwell Park      | Employment | E5   | Private                                           | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Cromwell Park      | Employment | E6   | Private                                           | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Dalcrue Employment |            | E9   | Private                                           | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Dunning Hou        | sing       | H20  | No but water storage issues require investigation | Yes - School projected at over 80% capacity. | No - New school opened in 2004.                                                                                                                                                 | Yes developer contributions required in line with Supplementary Guidance | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Dunning Oppo       | rtunity    | Op23 | No                                                | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance | No                                                | Site put forward by landowner currently in control of developer |
| Errol/Grange Hou   | sing       | H21  | No                                                | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance | No                                                | Site put forward by landowner currently in control of developer |

| Settlement             | Type              | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|------------------------|-------------------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                        |                   |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Glenfarg Hou           | sing              | H23 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Inchture Hou           | sing              | H24 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Invergowrie Employment |                   | E37 | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |
| Kinfauns               | Park and Ride RT1 |     | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |

| Settlement     | Type | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|----------------|------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                |      |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Longforgan Hou | sing | H25 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Longforgan Hou | sing | H26 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Luncarty Hou   | sing | H27 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |

| Settlement  | Type | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|-------------|------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|             |      |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Perth Mixed | Use  | MU1 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Perth Hou   | sing | H1  | No          | Euan                                         | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Perth Hou   | sing | H2  | No          | Euan                                         | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |

| Settlement       | Type | Ref | Constraints |                      |                                                                                                                                                                                 |                                                                             |          |                                                                 |
|------------------|------|-----|-------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------|-----------------------------------------------------------------|
|                  |      |     | Drainage    | Primary Education    | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding | Land ownership                                                  |
| Perth Hou        | sing | H3  | No          | Euan                 | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Perth Hou        | sing | H4  | No          | Euan                 | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Perth Hou        | sing | H7  | No          | New school required. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No       | Site put forward by landowner currently in control of developer |
| Perth Employment |      | E1  | No          | N/A                  | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |

| Settlement | Type    | Ref | Constraints |                                         |                                                                                                                                                                                 |                                                                             |          |                                                                 |
|------------|---------|-----|-------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------|-----------------------------------------------------------------|
|            |         |     | Drainage    | Primary Education                       | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding | Land ownership                                                  |
| Perth Oppo | rtunity | Op1 | No          | No - No capacity constraint identified. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Perth Oppo | rtunity | Op2 | No          | No - No capacity constraint identified. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Perth Oppo | rtunity | Op3 | No          | N/A                                     | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Perth Oppo | rtunity | Op5 | No          | N/A                                     | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |

| Settlement       | Type    | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|------------------|---------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                  |         |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Perth Oppo       | rtunity | Op6 | No          | No - No capacity constraint identified.      | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Perth Oppo       | rtunity | Op7 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Perth Oppo       | rtunity | Op8 | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Perth Employment |         | E2  | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Perth Employment |         | E3  | No          | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |

| Settlement       | Type    | Ref | Constraints                  |                                         |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|------------------|---------|-----|------------------------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|                  |         |     | Drainage                     | Primary Education                       | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Perth Oppo       | rtunity | Op9 | No                           | No - No capacity constraint identified. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Perth Oppo       | rtunity | Op4 | No                           | N/A                                     | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |
| Perth Employment |         | E38 | No                           | N/A                                     | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Perth Hou        | sing    | H70 | Further information required | New school required.                    | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |

| Settlement    | Type      | Ref  | Constraints                                                                               |                                              |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|---------------|-----------|------|-------------------------------------------------------------------------------------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|               |           |      | Drainage                                                                                  | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Perth Airport | Mixed Use | MU3  | Yes - Requirement to connect to public system and water supply and storage investigations | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Score Oppo    | rtunity   | Op22 | No                                                                                        | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Score Hou     | sing      | H29  | No                                                                                        | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Score Mixed   | Use       | MU4  | No                                                                                        | N/A                                          | N/A                                                                                                                                                                             | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |

| Settlement  | Type | Ref | Constraints |                                          |                                                                                                                                                                                 |                                                                             |                                                   |                                                                 |
|-------------|------|-----|-------------|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------|
|             |      |     | Drainage    | Primary Education                        | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding                                          | Land ownership                                                  |
| Stanley Hou | sing | H30 | No          | No - depending upon size of development. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |                                                   | Site put forward by landowner currently in control of developer |
| Stanley Hou | sing | H31 | No          | No - depending upon size of development. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No but FRA Required to deal with localised issues | Site put forward by landowner currently in control of developer |
| Stanley Hou | sing | H32 | No          | No - depending upon size of development. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No                                                | Site put forward by landowner currently in control of developer |

| Settlement       | Type | Ref | Constraints |                                              |                                                                                                                                                                                 |                                                                             |          |                                                                 |
|------------------|------|-----|-------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------|-----------------------------------------------------------------|
|                  |      |     | Drainage    | Primary Education                            | Secondary Education                                                                                                                                                             | Transport Infrastructure                                                    | Flooding | Land ownership                                                  |
| Stanley Hou      | sing | H33 | No          | No - depending upon size of development.     | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Stanley Hou      | sing | H34 | No          | No - depending upon size of development.     | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance No |          | Site put forward by landowner currently in control of developer |
| Wolfhill Housing |      | H35 | No          | Yes - School projected at over 80% capacity. | Capacity issues identified within the 4 Perth secondary schools. The construction of a fifth Perth Secondary School Planned for completion by 2018 will remove this constraint. | Yes developer contributions required in line with Supplementary Guidance    | No       | Site put forward by landowner currently in control of developer |

## Highland Perthshire Area

| Settlement | Type       | Ref | Constraints                            |                                              |                             |                          |                                                   |                                                                      |
|------------|------------|-----|----------------------------------------|----------------------------------------------|-----------------------------|--------------------------|---------------------------------------------------|----------------------------------------------------------------------|
|            |            |     | Drainage                               | Primary Education                            | Secondary Education         | Transport Infrastructure | Flooding                                          | Land ownership                                                       |
| Aberfeldy  | Employment | E10 | No but DIA may be required             | N/A                                          | N/A                         | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner part currently in control of developer |
| Aberfeldy  | Housing    | H36 | No but DIA may be required             | No - New School opened 2010                  | No - New School opened 2010 | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner part currently in control of developer |
| Aberfeldy  | Housing    | H37 | No but DIA may be required             | No - New School opened 2010                  | No - New School opened 2010 | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner                                        |
| Ballinluig | Employment | E11 | Private                                | N/A                                          | N/A                         | No                       | Yes                                               | Site put forward by landowner                                        |
| Ballinluig | Housing    | H40 | No but Network investigations required | No - No capacity constraint identified.      | No - New School opened 2010 | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner part currently in control of developer |
| Dunkeld    | Employment | E12 | Private                                | N/A                                          | N/A                         | No                       | No                                                | Site put forward by landowner who is also developer                  |
| Dunkeld    | Employment | E13 | Private                                | N/A                                          | N/A                         | No                       | No                                                | Site put forward by landowner who is also developer                  |
| Fearnan    | Housing    | H41 | Upgrade required by Scottish Water     | Yes - School projected at over 80% capacity. | No - New School opened 2010 | No No                    |                                                   | Doubt over landowners support                                        |

| Settlement                 | Type        | Ref | Constraints                                              |                                              |                                                       |                          |                                                   |                                                                     |
|----------------------------|-------------|-----|----------------------------------------------------------|----------------------------------------------|-------------------------------------------------------|--------------------------|---------------------------------------------------|---------------------------------------------------------------------|
|                            |             |     | Drainage                                                 | Primary Education                            | Secondary Education                                   | Transport Infrastructure | Flooding                                          | Land ownership                                                      |
| Inver Employment           |             | E14 | Private                                                  | N/A                                          | N/A                                                   | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner                                       |
| Kenmore Hou                | sing        | H42 | Upgrade required by Scottish Water                       | Yes - School projected at over 80% capacity. | No - New School opened 2010                           | No                       | No but FRA Required to deal with localised issues | Site supported by landowner                                         |
| Kinloch Rannoch Employment |             | E15 | No but Network investigations required N/A               |                                              | N/A                                                   | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner                                       |
| Kinloch Rannoch            | Housing H43 |     | No but Network investigations required                   | No - No capacity constraint identified.      | No - New School opened 2010                           | No                       | No but FRA Required to deal with localised issues | Landowner withdrawn support                                         |
| Murthly Hou                | sing        | H44 | Upgrade to drainage and water required by Scottish Water | Yes - School projected at over 80% capacity. | No - New School to the north of Perth may meet needs. | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner                                       |
| Murthly Hou                | sing        | H45 | Upgrade to drainage and water required by Scottish Water | Yes - School projected at over 80% capacity. | No - New School to the north of Perth may meet needs. | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner                                       |
| Pitlochry Hou              | sing        | H38 | No but DIA may be required                               | Yes - School projected at over 80% capacity. | No - New School opened 2010                           | No                       | No                                                | Site put forward by landowner and currently in control of developer |

| Settlement    | Type | Ref | Constraints                |                                              |                             |                          |                                                   |                                                                     |
|---------------|------|-----|----------------------------|----------------------------------------------|-----------------------------|--------------------------|---------------------------------------------------|---------------------------------------------------------------------|
|               |      |     | Drainage                   | Primary Education                            | Secondary Education         | Transport Infrastructure | Flooding                                          | Land ownership                                                      |
| Pitlochry Hou | sing | H39 | No but DIA may be required | Yes - School projected at over 80% capacity. | No - New School opened 2010 | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner and currently in control of developer |

## Kinross-shire Area

| Settlement         | Type       | Ref | Constraints                                                           |                                              |                                 |                          |                                                    |                                                                      |
|--------------------|------------|-----|-----------------------------------------------------------------------|----------------------------------------------|---------------------------------|--------------------------|----------------------------------------------------|----------------------------------------------------------------------|
|                    |            |     | Drainage                                                              | Primary Education                            | Secondary Education             | Transport Infrastructure | Flooding                                           | Land ownership                                                       |
| Balado Hou         | sing       | H51 | Within Loch Leven - No constraint subject to suitable mitigation.     | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner.                                         |
| Balado Employment  |            | E35 | Within Loch Leven - No constraint subject to suitable mitigation. N/A |                                              | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site put forward by Landowner but is seeking residential use.        |
| Blairingone        | Employment | E22 | No                                                                    | N/A                                          | N/A                             | No                       | No                                                 | Site supported by Landowner.                                         |
| Hattonburn Hou     | sing       | H52 | Within Loch Leven - No constraint subject to suitable mitigation.     | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site put forward by landowner and currently in control of developer. |
| Kinross Employment |            | E16 | No                                                                    | N/A                                          | N/A                             | No                       | No                                                 | Site supported by Landowner.                                         |
| Kinross Employment |            | E17 | No                                                                    | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site put forward by landowner and currently in control of developer. |
| Kinross Employment |            | E36 | No                                                                    | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site put forward by landowner and currently in control of developer. |

| Settlement            | Type | Ref | Constraints |                                              |                                 |                          |                                                    |                                                                      |
|-----------------------|------|-----|-------------|----------------------------------------------|---------------------------------|--------------------------|----------------------------------------------------|----------------------------------------------------------------------|
|                       |      |     | Drainage    | Primary Education                            | Secondary Education             | Transport Infrastructure | Flooding                                           | Land ownership                                                       |
| Kinross Employment    |      | E18 | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner.                                         |
| Milnathort Employment |      | E19 | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Doubt over landowners support                                        |
| Milnathort Employment |      | E20 | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner.                                         |
| Milnathort Employment |      | E21 | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Doubt over landowners support                                        |
| Kinross Hou           | sing | H46 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site put forward by landowner and currently in control of developer. |
| Kinross Hou           | sing | H47 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site put forward by landowner and currently in control of developer. |
| Milnathort Hou        | sing | H48 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner.                                         |
| Milnathort Hou        | sing | H49 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No No                    |                                                    | Site supported by Landowner.                                         |

| Settlement      | Type    | Ref  | Constraints |                                              |                                 |                          |                                                    |                              |
|-----------------|---------|------|-------------|----------------------------------------------|---------------------------------|--------------------------|----------------------------------------------------|------------------------------|
|                 |         |      | Drainage    | Primary Education                            | Secondary Education             | Transport Infrastructure | Flooding                                           | Land ownership               |
| Milnathort Hou  | sing    | H50  | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op10 | No          | N/A                                          | N/A                             | No                       | No                                                 | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op11 | No          | N/A                                          | N/A                             | No                       | No                                                 | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op12 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No No                    |                                                    | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op13 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | Yes                                                | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op14 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No No                    |                                                    | Site supported by Landowner. |
| Kinross Oppo    | rtunity | Op15 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No No                    |                                                    | Site supported by Landowner. |
| Milnathort Oppo | rtunity | Op16 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Milnathort Oppo | rtunity | Op17 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |

| Settlement           | Type        | Ref  | Constraints |                                              |                                 |                          |                                                    |                              |
|----------------------|-------------|------|-------------|----------------------------------------------|---------------------------------|--------------------------|----------------------------------------------------|------------------------------|
|                      |             |      | Drainage    | Primary Education                            | Secondary Education             | Transport Infrastructure | Flooding                                           | Land ownership               |
| Milnathort Oppo      | rtunity     | Op18 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No Yes                   |                                                    | Site supported by Landowner. |
| Kinross Oppo         | rtunity     | Op24 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No                                                 | Site supported by Landowner. |
| Ochil Hills Hospital | Opportunity | Op19 | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Powmill Employment   |             | E23  | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Powmill Housing      |             | H53  | No          | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Rumbling Bridge      | Employment  | E24  | No          | N/A                                          | N/A                             | No                       | No but FRA Required to deal with localised issues. | Site supported by Landowner. |
| Scotlandwell Hou     | sing        | H54  | No          | No - No capacity constraint identified.      | No - New School opened in 2009. | No                       | No                                                 | Site supported by Landowner. |

## Strathearn Area

| Settlement   | Type        | Ref  | Constraints                |                                              |                                 |                                              |                                                   |                                                                     |
|--------------|-------------|------|----------------------------|----------------------------------------------|---------------------------------|----------------------------------------------|---------------------------------------------------|---------------------------------------------------------------------|
|              |             |      | Drainage                   | Primary Education                            | Secondary Education             | Transport Infrastructure                     | Flooding                                          | Land ownership                                                      |
| Aberuthven   | Employment  | E29  | No but DIA may be required | N/A                                          | N/A                             | No                                           | No                                                | Site put forward by landowner and future occupier                   |
| Auchterarder | Employment  | E25  | No but DIA may be required | N/A                                          | N/A                             | No                                           | No but FRA required to deal with localised issues | Site put forward by landowner who is also developer                 |
| Auchterarder | Opportunity | Op20 | No but DIA may be required | No - Site part of Development Framework Area | No - New school opened in 2004. | No - Site part of Development Framework Area | No                                                | Site put forward by landowner who is also developer                 |
| Comrie Hou   | sing        | H58  | No but DIA may be required | No - No capacity constraint identified.      | No - New school opened in 2004. | No                                           | No but FRA required to deal with localised issues | Site put forward by landowner and currently in control of developer |
| Crieff       | Employment  | E26  | No but DIA may be required | N/A N/A                                      |                                 | No                                           | No                                                | Site put forward by landowner                                       |
| Crieff       | Employment  | E27  | No but DIA may be required | N/A N/A                                      |                                 | No                                           | No                                                | Site put forward by landowner                                       |
| Crieff Hou   | sing        | H55  | No but DIA may be required | Yes - School projected at over 80% capacity. | No - New school opened in 2009. | No No                                        |                                                   | Site put forward by landowner                                       |

| Settlement   | Type    | Ref  | Constraints                |                                              |                                 |                          |                                                   |                                                                                                          |
|--------------|---------|------|----------------------------|----------------------------------------------|---------------------------------|--------------------------|---------------------------------------------------|----------------------------------------------------------------------------------------------------------|
|              |         |      | Drainage                   | Primary Education                            | Secondary Education             | Transport Infrastructure | Flooding                                          | Land ownership                                                                                           |
| Crieff Hou   | sing    | H57  | No but DIA may be required | Yes - School projected at over 80% capacity. | No - New school opened in 2009. | No                       | No but FRA required to deal with localised issues | Site is made up of proposals put forward by individual landowners part currently in control of developer |
| Crieff Mixed | Use     | MU7  | No but DIA may be required | Yes - School projected at over 80% capacity. | No - New school opened in 2009. | No                       | No                                                | Site put forward by landowner                                                                            |
| Crieff Oppo  | rtunity | Op21 | No but DIA may be required | N/A                                          | N/A                             | No                       | No                                                | Site put forward by landowner                                                                            |

## Strathmore and the Glens Area

| Settlement             | Type | Ref | Constraints                                                     |                                              |                                              |                                                           |                                                   |                                                                    |
|------------------------|------|-----|-----------------------------------------------------------------|----------------------------------------------|----------------------------------------------|-----------------------------------------------------------|---------------------------------------------------|--------------------------------------------------------------------|
|                        |      |     | Drainage                                                        | Primary Education                            | Secondary Education                          | Transport Infrastructure                                  | Flooding                                          | Land ownership                                                     |
| Alyth Employment       |      | E30 | No                                                              | N/A                                          | N/A                                          | No                                                        | No                                                | Landowner wants residential development                            |
| Alyth Hou              | sing | H59 | Capacity at WWTW is very limited. Investment project instigated | No - No capacity constraint identified.      | No - New School opened in 2009.              | No                                                        | No but FRA Required to deal with localised issues | Site put forward by developer                                      |
| Alyth Hou              | sing | H60 | Capacity at WWTW is very limited. Investment project instigated | No - No capacity constraint identified.      | No - New School opened in 2009.              | No                                                        | FRA done                                          | Site has consent, awaiting S75 to cover Flood attenuation measures |
| Ardler Hou             | sing | H66 | No                                                              | No                                           | Yes - School projected at over 80% capacity? | No                                                        | No but FRA Required to deal with localised issues | Site put forward by landowner                                      |
| Blairgowrie Employment |      | E31 | Waste water network investigations required N/A                 |                                              | N/A                                          | Construction of link road from Coupar Angus Road required | No but FRA Required to deal with localised issues | Site put forward by landowner                                      |
| Blairgowrie Mixed Use  |      | MU5 | Waste water network investigations required                     | Yes - School projected at over 80% capacity. | No - New School opened in 2009.              |                                                           | No                                                | Site put forward by landowner                                      |
| Blairgowrie Hou        | sing | H62 | Waste water network investigations required                     | Yes - School projected at over 80% capacity. | No - New School opened in 2009.              | Construction of link road from Coupar Angus Road required | No but FRA Required to deal with localised issues | Site put forward by landowner                                      |
| Blairgowrie Hou        | sing | H63 | Waste water network investigations required                     | No - No capacity constraint identified.      | No - New School opened in 2009.              |                                                           | No but FRA Required to deal with localised issues | Site put forward by landowner                                      |

| Settlement              | Type       | Ref | Constraints                                                     |                                              |                                 |                                                              |                                                   |                                                                                       |
|-------------------------|------------|-----|-----------------------------------------------------------------|----------------------------------------------|---------------------------------|--------------------------------------------------------------|---------------------------------------------------|---------------------------------------------------------------------------------------|
|                         |            |     | Drainage                                                        | Primary Education                            | Secondary Education             | Transport Infrastructure                                     | Flooding                                          | Land ownership                                                                        |
| Blairgowrie Hou         | sing       | H64 | Waste water network investigations required                     | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | Provision of link road from Hazelwood Road to Berrydale Road | No but FRA Required to deal with localised issues | Site put forward by landowner                                                         |
| Carsie Hou              | sing       | H67 | No                                                              | Yes - School projected at over 80% capacity. | No - New School opened in 2009. | No                                                           | No                                                | Site owned by Council                                                                 |
| Coupar Angus            | Employment | E32 | No                                                              | N/A                                          | N/A                             | No                                                           | No                                                | Site carried forward from Adopted Local Plan                                          |
| Coupar Angus Employment |            | E33 | No                                                              | N/A                                          | N/A                             | No                                                           | No                                                | Site put forward by East of Scotland Farmers (developer)                              |
| Coupar Angus Hou        | sing       | H65 | No                                                              | No - No capacity constraint identified.      | No - New School opened in 2009. | No                                                           | No                                                | Site put forward by landowner for previous Plan, has expressed willingness to develop |
| Meigle Employment       |            | E34 | Capacity at WWTW is very limited. Investment project instigated | N/A N/A                                      |                                 | No                                                           | No                                                | Site put forward by landowner, however, now wants housing on site                     |
| Meigle Housing          |            | H68 | Capacity at WWTW is very limited. Investment project instigated | No - No capacity constraint identified.      | No - New School opened in 2009. | No                                                           | No but FRA Required to deal with localised issues | Site put forward by landowner                                                         |

| Settlement         | Type    | Ref | Constraints                                                     |                                                                                 |                                 |                          |                                                   |                               |
|--------------------|---------|-----|-----------------------------------------------------------------|---------------------------------------------------------------------------------|---------------------------------|--------------------------|---------------------------------------------------|-------------------------------|
|                    |         |     | Drainage                                                        | Primary Education                                                               | Secondary Education             | Transport Infrastructure | Flooding                                          | Land ownership                |
| Meigle Housing     |         | H69 | Capacity at WWTW is very limited. Investment project instigated | Some capacity constraints- provision of area for educational use/playing fields | No - New School opened in 2009. | No                       | No                                                | Site put forward by landowner |
| New Alyth          | Housing | H61 | Capacity at WWTW is very limited. Investment project instigated | No capacity constraint unless all Golf course development comes forward         | No - New School opened in 2009. | No                       | No but FRA Required to deal with localised issues | Site put forward by landowner |
| Spittalfield Mixed | Use     | MU6 | Public drainage system has limited capacity                     | No - No capacity constraint identified.                                         | No - New School opened in 2009. | No No                    |                                                   | Site put forward by landowner |

**PERTH AND KINROSS COUNCIL****26 June 2013****Perth Transport Futures Project****Report by the Executive Director (Environment)****PURPOSE OF REPORT**

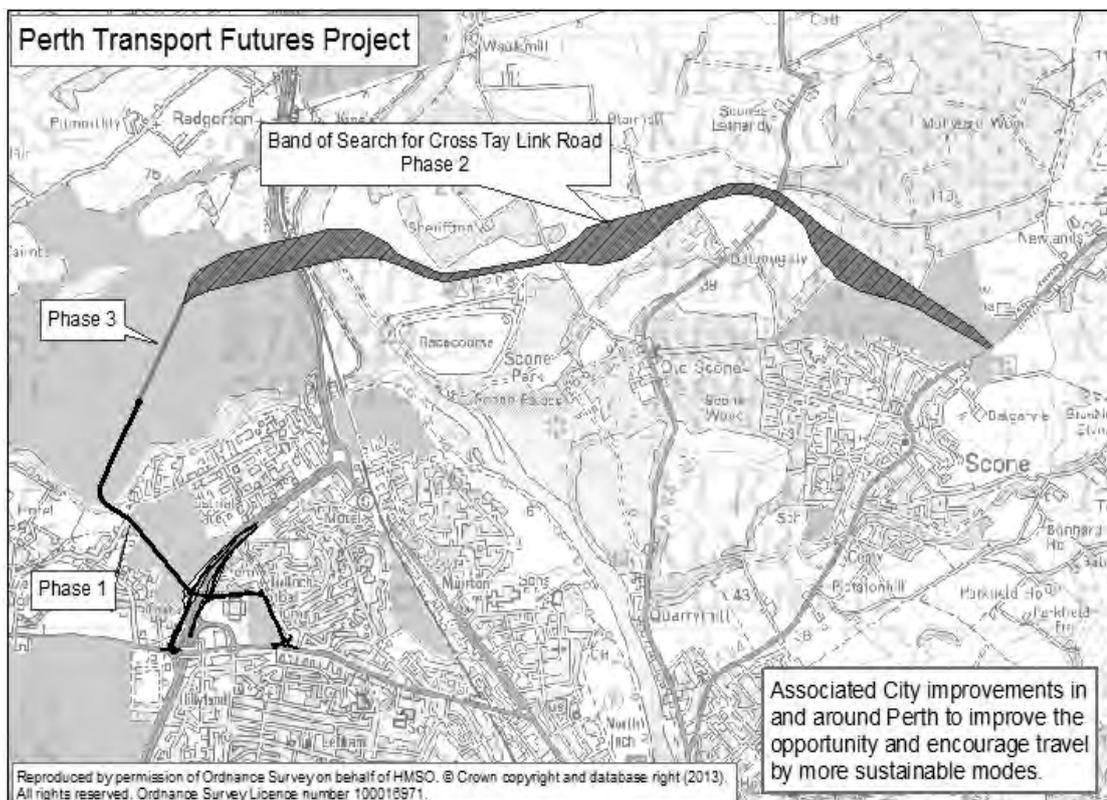
This report details successive decisions by Council to address the issues of congestion and air quality in, and around, Perth. As a result of the work undertaken in addressing these issues, the opportunity to examine sustainable economic growth opportunities for Perth, with benefits to the area as a whole, have also been identified. These have been incorporated in Strategic and Local Development Plans.

The report outlines the key phases of the Perth Transport Futures project, with a particular focus on the A9/A85 junction and the link road to Berthapark. It provides detail in relation to the resource implications to fund Phase 1 of the Perth Transport Futures Project. It also outlines an approach to involving elected members in informing the project as it moves forward.

**1. BACKGROUND**

- 1.1 It is widely acknowledged that Perth is a major strategic hub in the Scottish transport network where the principal routes connecting the central belt to North and North East Scotland converge. However, over the past 20 years, as a result of traffic growth nationally, there has been increasing concern over traffic congestion and related air quality issues in, and around, Perth.
- 1.2 As a result of these traffic and air quality issues, it was clear that there were both current, and future, problems which needed to be addressed in order to ensure that serious gridlock conditions could be avoided around the city. Failure to examine this congestion would continue to exacerbate the air quality issues, creating a vicious circle. The need for a solution which relieves this burden has, therefore, been identified as an issue over many years for successive Councils. The full history of this is outlined in Appendix 1.
- 1.3 While exploring the solutions to these problems, it became apparent that they would also support the sustainable economic growth opportunities for Perth, and the Council area as a whole. As such, this has become the basis on which the Strategic and Local Development Plans are now founded.
- 1.4 Appendix 2 provides further details about congestion and air quality.
- 1.5 In addition, the most recent Scottish Government population projections (2010 based) for the area continue to indicate sustained growth over the period to 2035, with Perth & Kinross projected to have the second highest percentage growth rate of all Scottish Authorities but the highest levels of in-migration. Approximately 50% of this growth is expected to be in the Perth City Housing Market Area. This indicates the continuing need for measures to improve air quality and congestion, while supporting economic growth.

- 1.6 The vision for the future transport network which was developed as part of the Scottish Transport Appraisals Guidance (STAG) process is “to provide a transport system in and around Perth that will support sustainable economic growth, protect and improve the environment and improve social inclusion and accessibility.”
- 1.7 Overall, the Perth Transport Futures Project is focussed on road infrastructure required to address key congestion points in the road network and to provide essential linkages to growth areas. The new infrastructure would not serve to support unrestricted growth in traffic. As such, the key elements form an integrated series of measures to address Perth’s long term transportation needs and ensure Perth’s growth does not compromise the national trunk road network. While the individual phases all deliver direct benefits, the ability of the Perth network to accommodate the projected sustainable economic growth, including the opportunity to create thousands of jobs, is only achieved with the delivery of the full package of measures. These would be delivered over a number of years and can be divided into 4 phases:-
1. Enhanced A9 / A85 Junction and link to Berthapark
  2. Cross Tay Link Road (CTRL)
  3. Berthapark north link to A9
  4. Associated City improvements such as traffic management measures and measures to further develop the cycling, walking and public transport networks in and around Perth to improve the opportunity and encourage travel by more sustainable modes.



- 1.8 There are significant benefits arising from the Perth Transport Futures Project. These can be summarised as:

- An upgraded A9/A85 junction providing for better flow of both local and through traffic and easier connections to Inveralmond.
- A second major access to Inveralmond will relieve pressure on this junction at peak times
- Improved pedestrian and cycle safety over A9.
- Reduction of journey times on the local transport network and increased network capacity.
- A vital first link in potential A9/A94 link road and 3<sup>rd</sup> Tay Crossing, so further enhancing the transport network in and around Perth.
- Expansion of Perth as envisaged in the Proposed Local Development Plan.
- Improved amenity for residents and businesses in the Crieff Road corridor.
- A positive contribution towards meeting the objectives of the Council's AQMA within both the Crieff Road Corridor and wider Perth
- Potential for the creation of between 3,000 – 5,000 jobs through the opening up of development land

1.9 The detailed cost/value analysis is contained in Appendix 3.

## **2. DEVELOPING THE SOLUTIONS – PERTH TRANSPORT FUTURES (PTF)**

2.1 In 2008, the Council commissioned a study under the framework of Scottish Transport Appraisal Guidance (STAG). This is a crucial stage in any major transport infrastructure project. It seeks clear evidence for any proposals without which Transport Scotland will not support any project that does not meet the criteria laid out within the framework.

2.2 The Regional Transport Strategy produced by TACTRAN covers a 15 year period and was approved by the Scottish Ministers in September 2008. The strategy highlights that a number of key junctions across the region are currently overloaded in peak periods. In the Perth context, these included the Broxden Roundabout, Bridgend and A85 Crieff Road in Perth. The proposed concentration of further housing and employment across the area will exacerbate these problems over time. Reference is also made to Perth being an Air Quality Management Area, with traffic as the main contributor to the local air quality problem.

2.3 Following both these reports, on 26 August 2009, in recognition of the need to examine ways to address key issues in relation to congestion, air quality and economic growth, the Enterprise and Infrastructure Committee approved three papers. These were:

2.4 **The Air Quality Action Plan for Perth** (Report No. 09/404 refers) which was developed to reduce the levels of Nitrogen Dioxide and Particles in order to meet the statutory standards. Among the actions contained within this Plan were options under six main headings – Cross Tay Link, Freight, Public Transport, Procurement, Planning and Education.

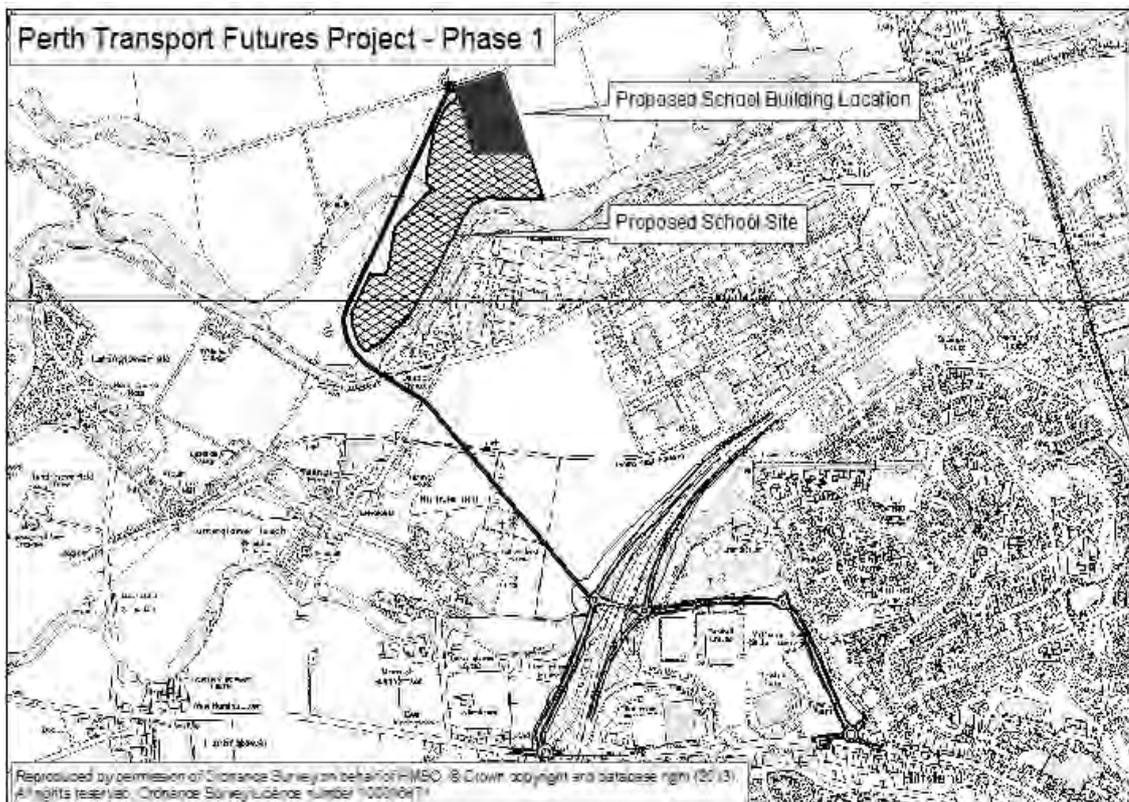
- 2.5 **The Strategic Transport Network Issues** (Report No. 09/405 refers) which detailed the findings of a major review of transport issues in and around Perth city. This report highlighted the requirement for significant improvements in transport infrastructure, including a major new Cross Tay Link, in order to accommodate the future development of the city. It also remitted the Executive Director to complete the Strategic Environmental Assessment (SEA) and associated public consultation process.
- 2.6 **The North West Perth Expansion Area Study** (Report No. 09/406 refers) which outlined the findings of the assessment of the infrastructure requirements and costs for the future development of North West Perth, principally related to the building of a new A9/A85 junction. This report outlined a range of options, and the Committee approved a line to the north of McDiarmid Park. It also remitted the Executive Director to take forward further development work into the detailed infrastructure design for North West Perth.
- 2.7 Following the SEA, the ongoing development of the Perth Transport Futures (PTF) project was integrated into the Strategic and Local Development Plan process. On 29 September 2010, the Council considered and approved for consultation the **Local Development Plan Main Issues Report** (Report No. 10/509 refers). This highlighted the critical nature of the package of transportation improvements required to deliver the growth strategy for the Perth area.
- 2.8 At a special meeting on 10 January 2012, the Council considered and approved a **Proposed Local Development Plan** (Report No. 12/5 refers). This is an expression of the Council's "**settled view in relation to the appropriate use of land within the Council area**". This identified the capacity of the local transportation infrastructure as the key constraint facing the Perth area. As a result, the delivery of the strategy for the sustainable economic growth of the city is reliant upon the phased delivery of the PTF project.
- 2.9 The TAYplan Strategic Development Plan was approved by the Scottish Ministers in June 2012. The adopted Plan promotes improvements to existing transport infrastructure, its network and linkages as well as making better use of existing network. The Proposals Map showed proposed upgrades along the A9 at the western edge of Perth and A9-A94 road link.
- 2.10 At the special meeting of the Council on 23 January 2013, the Council agreed to submit the Proposed Local Development Plan for examination to the Scottish Ministers without modification. (**Report No. 13/18 refers**). The Reporter has now asked a series of questions and set a date for a possible Hearing in July 2013. A significant focus of the questions is on the Council's commitment to deliver the transportation elements of the Plan.
- 2.11 On the basis of the agreed alignment outlined in paragraph 2.6 above for the A9/A85 junction, a planning application was submitted (along with the required Environmental Assessment). This was approved at the Development Management Committee of 30 May 2012 (**Report 11/01579/FLL refers**). It included the formation of slip roads, roundabouts, bridges, SUDS ponds, landscaping and diversion of the Lade, north of the A9 and A85 Junction. It should be noted that the planning application identified no impact on either the crematorium or the Garden of Remembrance.

- 2.12 At its meeting on 19 December 2012 (**report 12/586 refers**), the Council agreed to support the requirement for A9/A85 Road Junction Improvements in principle until the level of funding from the Scottish Government and other developer contributions became known. The Council also instructed the Executive Director (Environment) to continue dialogue with Transport Scotland to secure additional funding towards the Perth Transport Futures project. This dialogue is continuing with a view to developing a full funding strategy for the project for consideration by Council. In addition, Strategic Policy and Resources Committee on 17 April 2013 (**Report No 13/151 refers**) agreed that, in the interim to progress the project, it was necessary to fund approximately £400,000 for ground investigation and other consultancy costs.
- 2.13 The **Perth City Plan** approved by Council in May 2013 (Report No. 13/216 refers) also reflects the requirement to improve roads and transport infrastructure to enhance connectivity between the city centre and the planned western expansion, the wider region, and the rest of Scotland.
- 2.14 Appendix 1 identifies the key stages in the development of the PTF project outlining the Committee decision making process, the Development Plan and other strategic documents. This demonstrates that, while the funding solution is still not finalised, the Council's commitment to the Perth Transport Futures Project is clear.
- 2.15 Phase 1 of the PTF project covering the A9 / A85 Junction and link to Berthapark is explained in outline below.

### **A9/A85 Junction Upgrade and link to Berthapark**

- 2.16 Traffic modelling has identified the Crieff Road corridor, including the A9/A85 and Newhouse Road junctions, as a major issue. These routes also act as major local traffic distributors linking Perth to Crieff and the City with the major employment area of Inveralmond. In particular Newhouse Road acts as a key local distributor road for the large population areas of Letham and Burghmuir. The extent of the current congestion impacts severely on travel times in this locality and has resulted in the withdrawal of some bus services due to the inability to keep to a reliable timetable.
- 2.17 The preferred option in terms of optimising a design layout and minimising disturbance to existing property proposes a new grade separated interchange between the A9 and the A85 located to the north of the existing interchange (Report No. 09/406 refers). A new distributor road will also provide connections between the A9 and Crieff Road and routes to the north. The new interchange includes a new overbridge crossing of the A9 Western Bypass provided between two roundabouts. The existing slip roads onto the A9 will be stopped up. The full package of measures will also incorporate enhanced pedestrian/cycle crossing over the A9, together with public transport improvements.
- 2.18 After initial planning consent was granted, following landowner consultation, a re-design was sought to accommodate a property. This re-design now allows the North Stand at McDiarmid Park to be retained and there is still no impact on the Crematorium ground and the Garden of Remembrance.

- 2.19 Given the requirements for land for the junction, officers have started a dialogue with affected landowners with the aim of securing the required land voluntarily. If a voluntary arrangement cannot be reached then a report may need to be submitted to Council later in the year seeking consent for a Compulsory Purchase Order (CPO).
- 2.20 The road extends across the Almond and into the Berthapark school site and completes the first phase of the Perth Transport Futures project . This part is currently undergoing detailed design and assessments in accordance with the standard DMRB (Design Manual for Roads and Bridges) process. In addition, appropriate environmental assessments are being undertaken to inform the alignment decision making process and will form part of the subsequent planning application. There is limited scope to look at alignment options due to constraints over the crossing point of the Almond, the escarpment and the line of electricity pylons.



- 2.21 Work is ongoing in relation to site investigations for Phase 1. It is anticipated that construction will take place between financial years 2015/2016 – 2017/2018.
- 2.22 The delivery of the project provides the transport solution to reduce congestion on the existing road network, unlock the development potential in the Inveralmond and Berthapark area and access the all-through school planned in that area.

### **3. NEXT STEPS**

- 3.1 A Project Board has been established to lead on the detailed design, land acquisition, procurement and delivery of Phase 1 of the project. A Project Manager, who will report to the Project Board, will be appointed with responsibility to deliver the project. The Project Board is to investigate and assess potential procurement options for the project with cognisance taken of the risks associated with the various procurement strategies.
- 3.2 The development of Perth Transport Futures will be one of the largest infrastructure projects undertaken by the Council. As such, it is vital that elected members are fully involved in how the project moves forward.
- 3.3 It is therefore recommended that a series of workshops is organised during August 2013 to allow members to input into the development of the whole project.
- 3.4 The content of this report and the decisions of the Council in relation to it will be presented to the Reporter appointed to undertake the Local Development Plan examination.

### **4. RESOURCE IMPLICATIONS**

#### **Capital**

- 4.1 The estimated capital cost for Phase 1, including land acquisitions, is £23.5m. This includes an optimism bias in line with roads construction industry standards.
- 4.2 The Composite Capital Budget currently includes £400,000 in 2013/14 and a contribution from Sainsbury's of £2.18m is anticipated under a Section 75 agreement, leaving a net unfunded cost of £20.92m.
- 4.3 Whilst it is anticipated that future developments may lead to further contributions, and negotiations are still progressing with Transport Scotland, the Council will need to plan on the basis of funding the £20.92m in the short to medium term given that there is no certainty over future levels of external funding.
- 4.4 At its meeting on 19 December 2012 (report 12/586 refers), the Council committed to various additional capital infrastructure projects. The report included consideration of the A9/A85 Junction Improvements and recommended that the Council support the requirement for the project in principle. No funding was approved at that time and the Council instructed the Executive Director (Environment) to continue dialogue with Transport Scotland to secure additional funding. To date, no funding has been secured, but discussions are progressing.
- 4.5 Since 19 December 2012, the proposed scheme has been further developed to include a bridge over the river Almond and an access road to the Berthapark development site. The project is now at the point where funding needs to be identified to allow the scheme to progress.

- 4.6 A variety of funding options were examined in the December 2012 report to Council and the principal option identified was to fund additional capital expenditure through increased borrowing. It was proposed to manage the increased Capital Financing Costs (“loan charges”) in the short to medium term through the Capital Fund. This strategy was advised by a revised Treasury Management Strategy of deferring borrowing in 2012/13 and 2013/14 and utilising cash balances to meet capital expenditure in the short term to give rise to savings in Capital Financing Costs.
- 4.7 Based on the additional capital expenditure approved by the Council in December, excluding the current proposal, it is currently projected that the resources available in the Capital Fund will be exhausted by 2024/25. At this point it is anticipated that it will be necessary to increase the revenue budget for loan charges by £4.355m per annum. This is illustrated at Appendix 4a.
- 4.8 Report 12/586 also illustrated the impact of including the additional borrowing costs for the A9/A85 junction in the event that significant Scottish Government contributions were not forthcoming. Additional borrowing is currently considered to be the most likely means of funding the majority of PTF Phase 1 costs although other potential sources of funding are outlined below. It is, therefore, recommended that the Council base the decision on whether to commit to funding Phase 1 on the premise that it will have to borrow to fund £20.92m and that this borrowing will be managed through the Capital Fund in the manner illustrated at Appendix 4b.
- 4.9 By extending the approved strategy to include the additional £20.92m of unfunded expenditure for the PTF phase 1 project, it is estimated that the Capital Fund could only support additional borrowing costs until 2022/23, before requiring a larger increase in the loan charges budget thereafter. Based on current projections, it would be necessary to increase the loan charges budget by £2.844m in 2022/23. Thereafter, it would be necessary to increase the loan charges budget by around a further £3m per annum. Therefore, approval for funding this scheme through borrowing would bring forward the requirement to increase the loan charges by 2 years and require a further increase in the loan charges budget of around £1m per annum.
- 4.10 This is the biggest civil engineering project to be delivered by the Council since the Perth Flood Prevention Scheme. The impact outlined above details the anticipated level of budget required to deliver the project and the Council’s existing capital commitments, which is a prudent approach. There may, however, be opportunities to reduce the costs indicated. The level of additional borrowing necessary to fund this project will be reduced through developer contributions, although the level and timing of this is uncertain. In addition, discussions with the Scottish Government are still ongoing in relation to potential funding which would mitigate the cost to the Council. It might also be reduced through other funding sources including:
- Additional capital grant of up to £1,051,000 in the current financial year depending on the exact phasing of the expenditure.
  - Reprioritising the existing Capital Plan to remove or delay existing approved projects.
  - Reducing the cost of Phase 1 as the optimism bias is tested.

- 4.11 The financial planning required to manage the additional contributions to the loan charges budget will be a significant task for the Council. This will include a comprehensive review of the medium term financial plan with detailed consideration to be undertaken through the detailed revenue and capital budget setting process.
- 4.12 Appendix 4c illustrates the impact on borrowing costs and the Capital Fund if 50% of the expenditure of £20.92m on Phase 1 was met from other funding sources in each year. The effect would be to reduce the requirement to enhance the loan charges by around £0.5m and to delay the timing of the increase by around one year, in comparison with the position outlined above.
- 4.13 The proposed use of the Capital Fund to manage loan charges over the medium term is illustrated at Appendix 4. There is clearly a significant degree of uncertainty about the financial implications of approving PTF Phase 1. It is, therefore, recommended that the decision on whether or not to progress with the Scheme is based on the scenario illustrated at Appendix 4b. In this scenario and taking into account commitments already made by the Council in December, it is currently forecast that £2.844m will be required in 2022/23 and £5.835m in 2023/24 to augment the Loan Charges budget. This compares with £4.355m in 2024/25 if PTF Phase 1 is not progressed. Members will be aware that identifying options to manage projected increases in expenditure of this order of magnitude will present a significant challenge in the current environment. In the event that approval is given to fund the project, it would be prudent to begin the process of identifying additional Revenue and Capital Budget strategies well in advance of 2022/23. The detailed approach to funding PTF Phase 1 will be considered as part of the annual Revenue and Capital Budget processes.
- 4.14 Given that PTF Phase 1 represent the interface between the local road network and the trunk road network the legislative position in relation to borrowing to fund capital expenditure is complicated. Legal advice has been received and it is possible that Ministerial Consent will be required to enable borrowing. It is recommended that the Council instruct the Head of Finance to determine whether such approval is required and to seek such consent.
- 4.15 Subject to the Council committing to identifying an appropriate approach to funding the additional loan charges identified in paragraph 4.13 above, the additional borrowing associated with this project would be prudent, sustainable and affordable. The Council's prudential indicators will be updated to reflect the inclusion of any additional capital expenditure in a report to the next meeting in October 2013.
- 4.16 The Council currently has no funding strategy in relation to PTF Phase 2, the Cross Tay Link Road. Given the scale of this project and the current fiscal environment, this project can be only be progressed in the short to medium term with significant Scottish Government funding. There is no such commitment at this time.

## **Revenue**

- 4.17 In addition to the additional loan charges budget identified above, there will be maintenance costs for Phase 1. These will be met, as necessary, through prioritisation of the structural maintenance budget.

## 5. CONCLUSION AND RECOMMENDATIONS

5.1 The Perth Transport Futures Project plays a vital part in the reduction of congestion, improvement in air quality and sustainable development and economic growth of Perth, and the area as a whole. The report outlines the extensive background work undertaken to date on developing the project, the links to key strategic documents such as TAYplan, Proposed Local Development Plan and the potential costs associated with the Project. The report also seeks the necessary funding commitment to deliver the Project, with a particular focus on the first two phases of the Project – the A9/A85 junction and link to Berthapark. The Council's commitment to transport infrastructure is of particular interest to the Reporter in relation to the Local Development Plan examination.

5.2 The Council is asked to:

1. Endorse the requirement for the Perth Transport Futures project
2. Commit to funding Phase 1 of the project, taking into account the position outlined in Section 4
3. Instruct the Head of Finance to determine whether consent is required from Scottish Ministers for borrowing and to request such consent, if necessary
4. Agree that workshops will be undertaken to allow further elected member input into the development of Phase 1
5. Authorise the Executive Director (Environment) to progress the Compulsory Purchase Order (CPO), if required, and report back to members in due course.
6. Instruct the Executive Director (Environment) to continue discussions with Transport Scotland and Scottish Government officials regarding the Perth Transport Futures project.
7. Request the Executive Director (Environment) to provide further reports in due course on the implementation of Phase 1 of the Perth Transport Futures project.
8. Request the Executive Director (Environment) to provide further reports in due course on the implementation and funding arrangements for the future phases.

### Author(s)

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### Approved

| Name                     | Designation                      | Signature            |
|--------------------------|----------------------------------|----------------------|
| Jim Valentine            | Executive Director (Environment) | <i>Jim Valentine</i> |
| <b>Date</b> 19 June 2013 |                                  |                      |

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## ANNEX

## 1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

The undernoted table should be completed for all reports. Where the answer is 'yes', the relevant section(s) should also be completed

| <b>Strategic Implications</b>                       | <b>Yes / None</b> |
|-----------------------------------------------------|-------------------|
| Community Plan / Single Outcome Agreement           | <b>Yes</b>        |
| Corporate Plan                                      | <b>Yes</b>        |
| <b>Resource Implications</b>                        |                   |
| Financial                                           | <b>Yes</b>        |
| Workforce                                           | <b>No</b>         |
| Asset Management (land, property, IST)              | <b>Yes</b>        |
| <b>Assessments</b>                                  |                   |
| Equality Impact Assessment                          | <b>Yes</b>        |
| Strategic Environmental Assessment                  | <b>Yes</b>        |
| Sustainability (community, economic, environmental) | <b>Yes</b>        |
| Legal and Governance                                | <b>Yes</b>        |
| Risk                                                | <b>Yes</b>        |
| <b>Consultation</b>                                 |                   |
| Internal                                            | <b>Yes</b>        |
| External                                            | <b>Yes</b>        |
| <b>Communication</b>                                |                   |
| Communications Plan                                 | <b>Yes</b>        |

### 1. Strategic Implications

#### Community Plan / Single Outcome Agreement

- 1.1 The project supports the Community Plan Vision to ***create and sustain vibrant, safe, healthy and inclusive communities in which people are respected, nurtured and supported and where learning and enterprise are promoted.*** Specifically this projects encourages sustainable economic growth, an improves and safer environment and healthier choices for sustainable transport.
- 1.2 The project supports the following Outcomes:
- Our area will have a thriving and expanding economy
  - Our area will have improved infrastructure and transport links
  - Our young people will attain, achieve and reach their potential
  - Our communities will be safer
  - Our area will have a sustainable natural and built environment

#### Corporate Plan

- 1.3 The Council's Corporate Plan 2013 – 2018 lays out five outcome focussed strategic objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:

- i) Giving every child the best start in life
- ii) Developing educated, responsible and informed citizens
- iii) Promoting a prosperous, inclusive and sustainable economy
- iv) Supporting people to lead independent, healthy and active lives
- v) Creating a safe and sustainable place for future generations.

1.4 The project's benefits in respect of the wider objectives of the Corporate Plan (2013 – 2018) are outlined below:

- Giving every child the best start in life – provides access to the proposed new school campus
- Promoting a prosperous, inclusive and sustainable economy – assist in the delivery of sustainable economic growth of the Perth Area, in particular opening up of economic development land to the north and north west of Perth
- Supporting people to lead independent, healthy and active lives - The project will reduce congestion and therefore reduce traffic emissions, thereby contributing positively to air quality in the corridor and surrounding area. This will have a positive benefit for the health of residents in this area. The project also includes enhanced provision for pedestrian and cycle crossing over the A9 together with the upgrading of existing footpaths. This will provide a more positive environment for pedestrians and cyclists and could encourage more people within the area to walk and cycle.
- Creating a safe and sustainable place for future generation - The project will facilitate the delivery of the Local Development Plan strategy to support the sustainable economic growth of the area. In addition, by facilitating the Cross Tay Link Road and delivering the "Shaping Perth's Transport Future" transport strategy, this project can contribute to reducing the carbon footprint of the area and promoting sustainable travel modes. The project will lead to lower journey times and reduce congestion, while providing more travel connections and alleviating the conflict between local and through traffic movements. This will provide for a better environment for this area.

## 2. Resource Implications

### Financial

2.1 The body of the report contains the required analysis of the financial implications of the report.

### Workforce

2.2 None.

### Asset Management (land, property, IT)

2.3 Future maintenance will be prioritised within the budget available.

### 3. Assessments

#### Equality Impact Assessment

- 3.1 The proposals have been considered under the Corporate Equalities Impact Assessment process (EqIA) using The Integrated Appraisal Toolkit and have been assessed as **not relevant** for the purposes of EqIA

#### Strategic Environmental Assessment

- 3.2 The proposals have been considered under the Environmental Assessment (Scotland) Act 2005 using The Integrated Appraisal Toolkit and no further action is required as it does not qualify as a PPS as defined by the Act and is therefore exempt.

#### Sustainability

- 3.3 The proposals have been considered under the provisions of the Local Government in Scotland Act 2003 and Climate Change Act using The Integrated Appraisal Toolkit. The proposals will not have a direct impact on sustainable development or climate change.
- 3.4 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act, the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions. This report however seeks to identify the capital funding take forward a proposal which is a key action from the Proposed LDP. There is a statutory duty of the Council to ensure that the LDP contributed towards sustainable development accordingly no further assessment is required.

#### Legal and Governance

- 3.5 The Perth Transport Futures project has been under development for a number of years. Appendix 1 outlines the full approvals undertaken by the Council, and its committees over that time period.
- 3.6 Future reports will be submitted to Council as the project progresses.
- 3.7 A Project Board has been established to oversee the delivery of Phase 1. Membership includes the Heads of Legal and Finance. The Board examines all issues in relation to risk through the developing risk matrix.

### 4. Consultation

#### Internal

- 4.1 The Executive Officer Team, the Head of Finance, the Head of Legal Services and the Head of Democratic Services have been consulted in the preparation of this report.

## External

4.2 TACTRAN have been consulted in the preparation of this report.

## **5. Communication**

5.1 This is a significant infrastructure project which will require a detailed communications plan. This will include workshops with elected members in August 2013.

## **2. BACKGROUND PAPERS**

Appendix 1 details the full list of documents relied upon in the formulation of this report

## **3. APPENDICES**

- Appendix 1 – Perth Transport Futures project Background Reports and Studies
- Appendix 2 – Congestion/air quality management
- Appendix 3 – Cost/value analysis
- Appendix 4a – Financial information
- Appendix 4b – Financial information
- Appendix 4c – Financial information

## Perth Transport Futures – Key Studies and Reports

This identifies the key stages in the development of the PTF package outlining the Committee decision making process, the Development Plan and other strategic documents.

### March 1996 - [Perth Area Local Plan 1995: Written Statement](#) (link)

Policy 39 on page 22 refers to support for Perth Area Transportation & Land Use Study (PATLUS) investigations with a view of relieving congestion at Perth Bridges.

Page 23 under Recommendations, REC 2 refers to a new bridge north of Perth town centre

REC 9 on page 38 refers to a new bridge being required north of Perth town centre. Repeat of REC 2 on page 23)

REC12 on page 39 recommends amending the A9/A85 junction and partial interchange with A9 for Inveralmond Industrial Estate.

### June 2003 - Perth & Kinross Structure Plan 2003: Written Statement

This Plan was adopted in June 2003 and covers the entire area of Perth and Kinross and provided broad strategic guidance up until 2020. The Structure Plan indicated what sort of development was required and where it should take place. This included recognition of the need to improve transport links if development is to provide for population, employment and environmental changes. It included recommendations for the A9/A85 and a need for a new bridge across the Tay River. They are as follows;

Para 3.2 on page 17 of Overall Strategy refers to need to improve transport links.

Para 5.7 on page 33 refers to development on A85 corridor as it is close to strategic transport network.

Sustainable Economy Policy 13 on page 42 specifically mentions the need to identify land for a new bridge over the Tay

### June 2004 – Enterprise & Infrastructure Committee Report on Perth Area Local Plan Traffic Implications (Report 04/378)

Report discusses the likely outcome of city wide traffic modelling exercise at western edge of Perth and the wider Perth area and makes recommendations (see below) on key infrastructure proposals essential for the delivery of the Plan Strategy.

Report was approved but the Plan did not proceed to adoption.

Paras 4 and 6 on page 2 states that failing to address infrastructure requirements between the Broxden and Inveralmond roundabouts will result in chronic congestion at key junctions at the western edge of Perth including the Crieff Road junction.

Para 12 on page 3 refers to the need for a major new road over the A9 from Inveralmond linking it to a new junction on the A85

Para 13 on page 3 and 4 examine the impacts on the road network of different scenarios.

### June 2004 – Enterprise & Infrastructure Committee Report on Review of Perth Area and Central Area Local Plans (Report 04/379)

Report reviews the Council's Draft Perth Area/Central Area Local Plan including development of a Paramics traffic model and addressing the implications for the local transport strategy which was under review at the time.

Para 11 on page 4 recognises the severe traffic problems in the north western area of Perth.

Para 12 on page 4 refers to development on the old Auction Mart would assist with the new junction on the A9 to serve Inveralmond West.

Para 13 on page 4 refers to Almond Valley village and that its development would contribute to the cost of a junction with the A9 but not from the A85 as originally proposed.

Para 14 on page 15 refers to transport modelling used and that radical solutions are required for the A9/A85 area. Recommend a new junction on the A9 with a link to the A85.

#### **August 2004 – Enterprise & Infrastructure Committee Report on Draft Perth Area/Central Area Local Plan (Report 04/437)**

Report reviews the Council's decision to omit Almond Valley Village from Draft Perth Area/ Central Area Local including addressing the implications for the local transport strategy.

Para 6 on page 3 and para 17 on page 6 refers to funding issues of A9 junction if Almond Valley is omitted from the Plan. It will pose significant challenges to securing necessary road infrastructure improvements and the development potential of north west Perth.

#### **December 2004 - Draft Perth Area/Central Area Local Plan 2004**

The Plan seeks to provide mixed use development in north west Perth to assist the provision of required infrastructure along the A9 between Broxden and Inveralmond roundabouts including a new junction at the A9/A85.

Para 4.1 on page 12 refers to major improvements required to A85/A9 junction and access at Inveralmond Industrial Estate.

Para 4.16 on page 14 refers to issue of Tay Bridge crossing to the north of Perth and has been discussed for decades and how the Local Plan safeguards land for such purpose.

Para 8.4 on page 32 refers to need for new junction at A85/A9.

P7 Inveralmond Industrial Estate (West) on page 57 refers to a new road junction required at Crieff Road or Bypass.

P10 Newton Farm on page 58 refers to need for new distributor road linking to Crieff Road.

#### **June 2006 - Enterprise & Infrastructure Committee Report on comments received to Draft Perth Area/Central Area Local Plan 2004 (Report 06/480)**

This report and the accompanying appendices identified the key issues for the Finalised Plan and makes recommendations on key infrastructure proposals essential for the delivery of the Plan Strategy and identifies sites for further investigation prior to the production of a Finalised Plan. It also sets out the procedures required to fulfil the Council's obligations for Strategic Environmental Assessment and Appropriate Assessment.

This report identified the sensitivities associated with works in the vicinity of the crematorium and the gardens of remembrance and it was noted that the road line should not impinge on either.

Report approved but ultimately the Plan did not proceed to adoption.

Para 20 on page 5 refers to need to develop rationale for new Tay Bridge and western edge road improvements.

Para 45 on page 29 refers to improvements required to Inveralmond roundabout, Broxden roundabout, new A9/A85 junction and new Tay Bridge linking it to Scone.

Paras 47 to 53 on pages 30 to 31 refer to works required to Western Bypass

**September 2008- [Tayside and Central Scotland Transport Partnership Regional Transport Strategy 2008-2023](#) (link)**

TACTRAN produced a RTS that covers a 15year period and is refreshed every four years.

One of the objectives in this RTS is to ensure transport helps to deliver regional prosperity addressing issues of peripherally associated with the TACTRAN area.

The strategy highlights a number of key junctions across the region, in and round the three main cities are currently overloaded in peak periods. A9/M90/A93 Broxden Roundabout, Bridgend and A85 Crieff Road are principal areas in Perth where congestion is a significant problem. The proposed concentration of further housing and employment across the south of the TACTRAN region will exacerbate these problems over time.

Page 41 refers to Perth having Air Quality Management Areas and in each case traffic is the main contributor to the local air quality problem.

**August 2009 – [Enterprise & Infrastructure Committee: Strategic Transport Network Issues \(Report 09/405\)](#) (link)**

This report outlined the key findings of the STAG appraisal including the preferred route option for the CTRL. The report also highlighted other aspects of the STAG appraisal which were:

- New crossing of the Tay
- New grade separated junction on the A9 and Improved A9/A85 Junction
- New Park and Ride sites
- Improved walking and cycling facilities
- Public Transport enhancements
- Friarton Link Road

The recommendations were:

- Note the completion of a comprehensive study into issues relating to the present and future capacity of the transport network in and around Perth
- Give approval for undertaking a full Strategic Environmental Assessment (SEA) of the alternative transport solutions identified in the study and a full and wide ranging consultation exercise into the likely public and key stakeholder acceptability of a potential new Tay crossing and associated package of improved transport measures in and around the city.
- Remit to the Executive Director to report back to a future meeting of the Enterprise and Infrastructure Committee on the results of the SEA and associated public consultation exercise, details of the package of sustainable measures in the central area of the city to complement the optimum alignment of a new Cross Tay Link and a report into potential options for funding and phasing of necessary improvements.

Report approved by committee.

**August 2009 – [Enterprise & Infrastructure Committee: North West Perth Expansion Area Study \(Report 09/406\)](#) (link)**

This report outlined the key findings of the Development Impact Appraisal for the NWPEA.

The recommendations were:

- Note the completion of a comprehensive Appraisal into transport issues in and around the north western edge of the city;
- Note the completion of a comprehensive study assessing the infrastructure requirements and costs for the future development of North West Perth;
- Remit to the Executive Director (Environment) to take forward further development work into the detailed infrastructure design for North West Perth;
- Remit the Head of Finance and Corporate Resources Group to investigate delivery funding options and report back to a future Committee.

Report approved by committee.

**August 2009 – [Air Quality Action Plan \(Report 09/404\)](#) (link)**

This report outlined the Air Quality Action Plan which was developed to reduce the levels of Nitrogen Dioxide and Particles in order to meet the statutory standards. Among the actions contained within this Plan were options under six main headings – Cross Tay Link, Freight, Public Transport, Procurement, Planning and Education.

**November 2009 – [Perth Western Edge Development Impact Appraisal](#) (link)**

This was a STAG appraisal (Part 1 & Part 2) of potential solutions of a Perth Western Edge expansion. This appraised a large number of options including variations of routes and alignments around McDiarmid Park.

It was noted in this report that some of the options would “be unacceptable to local residents given public sensitivity towards the crematorium” and therefore would not be taken forward due to issues with implementability.

The retention of a dedicated crematorium access from Crieff Road in the options appraised minimised the potential risk of public acceptability of the proposals.

The main conclusion of the report was that option 2 & 3 (the junction link to the North and South of McDiarmid Park respectively) both met all objectives with broadly similar construction costs for both alignments.

**April 2010 - [TAYplan Strategic Development Plan Main Issues Report](#) (link)**

Plan focuses on changes required at a strategic land use level. The provision of infrastructure is considered key to improving accessibility and economic opportunities.

Para 7.14 on page 33 refers to congestion issues in Perth city centre and along the A9 and A90 between Broxden and Inveralmond.

**September 2010 - [Perth & Kinross Local Development Plan Main Issues Report \(Report 10/509\)](#) (link)**

Plan identifies new and improved physical infrastructure projects to support the projected expansion in population especially within the Perth core area.

Paras 3.6.9 to 3.6.12 on page 31 refer to congestion issues in city centre and at Broxden roundabout, Inveralmond roundabout and A9/A85 junction

Para 4.6.8 on pages 60 and 61 refers to the requirement for significant improvements to Perth's transport infrastructure.

Para 4.6.12 on page 61 refers to the commitment to improving the transport network around Perth and this includes the development of the CTRL north of Inveralmond; an improvement to the A9/A85 junction and a link from the CTRL to the A9/A85 junction.

Para 4.6.13 on page 62 refers to a variety of options being considered for the CTRL leaving a preferred route corridor and there is a map showing the route.

Para 4.6.14 on page 62 refers to the timescales expected for works on the CTRL, the A9/A85 junction and city centre enhancements.

Paras 4.6.15 to 4.6.17 on page 63 deal with funding of such infrastructure.

Para 5.2.19 on page 80 refers to Almond Valley requiring a new junction at A9/A85.

Para 5.2.21 on page 83 refers to the creation of a CTRL south of Luncarty and providing an improved link to the A9 for Luncarty and Stanley.

Para 5.2.33 on page 97 refers to delivery of key infrastructure projects at CTRL; A9/A85; Inveralmond roundabout and Broxden roundabout.

### October 2010 - [Perth Traffic and Transport Issues Transport Appraisal \(Final\)](#) (link)

A STAG (Scottish Transport Appraisal Guidance) appraisal was undertaken of Perth's wider transport issues and potential solutions in October 2010. STAG is an objective led appraisal technique that ensures that eventual transport interventions fully accord with national, regional and local strategic objectives.

This appraised 11 options that would alleviate the identified issues with 6 options taken forward for further appraisal. The conclusions of the appraisal were that a Cross Tay Link Road (CTLR) along with a range of other measures with a suggested phased approach:

- Crieff Road Improvements – to address immediate network issues at a core location for the future development of Perth.
- CTLR– to provide an alternative route across the River Tay thereby removing the need for all east-west movements to travel through the city centre and provide the capacity for cycling; walking and public transport improvements.
- Sustainability package – to provide improvements to the cycling, walking and public transport network.
- Broxden grade-separation – to provide improved journey times and reliability.
- New slip roads at M90 Friarton junction (future work).

### October 2010 - [Shaping Perth's Transport Future Strategy Document](#) (link)

This summarised the STAG appraisal and formed it into a Transport Strategy for the Council to take forward including an integrated package of Perth City Centre enhancements.

### October 2010 - [Shaping Perth's Transport Future: SEA Environmental Report](#) (link)

This was the SEA for the Shaping Perth's Transport Future Transport Strategy encompassing all projects.

### November 2011 - [Shaping Perth's Transport Future: SEA Environmental Report Addendum](#) (link)

This was the addendum to SEA for the Shaping Perth's Transport Future Transport Strategy following extensive consultation work. This firmed up the corridor option for the CTLR.

### November 2011 - [DMRB Stage 1 Assessment Report](#) (link)

The DMRB Stage 1 Assessment's purpose is to identify *"the environmental, engineering, economic and traffic advantages, disadvantages and constraints associated with broadly defined improvement strategies"*

The report summarises the options identified as part of the earlier Perth Traffic Transport Issues STAG appraisal and appraised them in greater detail. It notes that consultation with St Johnstone Football Club ruled out the option of the link road passing to the south of the McDiarmid Park. The options taken forward to DMRB Stage 2 Assessment were:

- Option 2: New bridge over the A9 north of McDiarmid Park
- Option 16: New Foot/Cycle Bridge

### November 2011 - **DMRB Stage 2 Assessment Report**

This looked into the options identified in Stage 1 in further detail, identifying key risks and constraints to the options as well as assessing the various route alignments (all to the north of McDiarmid Park).

The key considerations of the options assessed were:

- Alternative Junction Layouts
- Type and buildability of the road bridge
- Impact on the Lade
- Amendments to the existing Crematorium access
- Drainage

Alignment 1 was selected for further assessment as it had key advantages over other alignments considered:

- Provides the second longest weaving length to Inveralmond Roundabout at 710m
- Was Transport Scotland's Standards Branch's preferred option
- Allows the implementation of the Primary Flood Mitigation Area

The DMRB Stage 2 report also outlines the options associated with the Crematorium access (section 4.9) including retaining a separate access and combining the new road with the access. It was recommended that Option B (to retain the separate access road) was taken forward.

#### **May 2012 – Planning Application Approval (Report 11/01579/FLL)**

On the basis of the agreed alignment for the A9/A85 junction, a planning application was submitted (along with the required Environmental Assessment). This was approved at the Development Management Committee of 30 May 2012). It included the formation of slip roads, roundabouts, bridges, SUDS ponds, landscaping and diversion of the Lade, north of the A9 and A85 Junction. It should be noted that the planning application identified no impact on either the crematorium or the Garden of Remembrance.

#### **June 2012 - [TAYplan Strategic Development Plan](#) (link)**

The approved Plan promotes improvements to existing transport infrastructure, its network and linkages as well as making better use of existing network.

Proposals Map on page 7 shows proposed upgrades along A9 at western edge of Perth and A9-A94 road link.

Policy 3 on page 13 refers to safeguarding land for infrastructure provision including routes identified on the Proposals Map.

#### **January 2012 – [Special Council Meeting Perth & Kinross Proposed Local Development Plan \(Report 12/5\)](#) (link) [Link to Proposed Local Development Plan](#)**

The Plan focuses on the growth of Perth City and its core area and that much of the existing infrastructure is at capacity. Therefore essential infrastructure needs to be in place and requires investment as a result.

Para 3.6.3 on page 34 refers to need for significant transport investment required for Perth.

Paras 5.1.14 to 5.1.17 on page 70 refers to the transport infrastructure needs for Perth including the A9/A85 junction and the CTRLR.

Site H7 (Berthapark) on page 77 mentions need for CTRLR to be in place before development commences.

Site H70 (Perth West) mentions need for multiple access points onto Trunk Road.

Site E38 (Ruthvenfield Road) and Op7 (Newton Farm) on page 80 refers to requirement for A9/A85 junction improvement.

Site H27 (Luncarty South) on page 135 refers to new A9 junction to be required

Site H29 (Scone North) on page 142 refers to need for CTRLR to be in place before houses can be occupied.

#### **January 2013 [Special Council Meeting Proposed Local Development Plan Draft Action Programme \(Report 13/26\)](#) (link)**

The information contained in this paper demonstrates that the Council has taken account of the infrastructure and other constraints likely to impact upon the effectiveness of the sites identified in the Plan

It further demonstrated that the Council has taken steps to implement plans to address the critical constraints making significant progress in a range of projects.

**April 2013 – [Composite Capital Budget and Housing Investment Programme 2012/17 – Monitoring Report No 4](#) (link)**

The report identified that in the interim of further dialogue with Transport Scotland to secure additional funding towards the A9/A85 as agreed in December 2012, in order to progress the project, £400,000 is required to fund ground investigation and other consultancy costs.

Report approved by committee.

**May 2013 – [Perth City Plan](#) (link)**

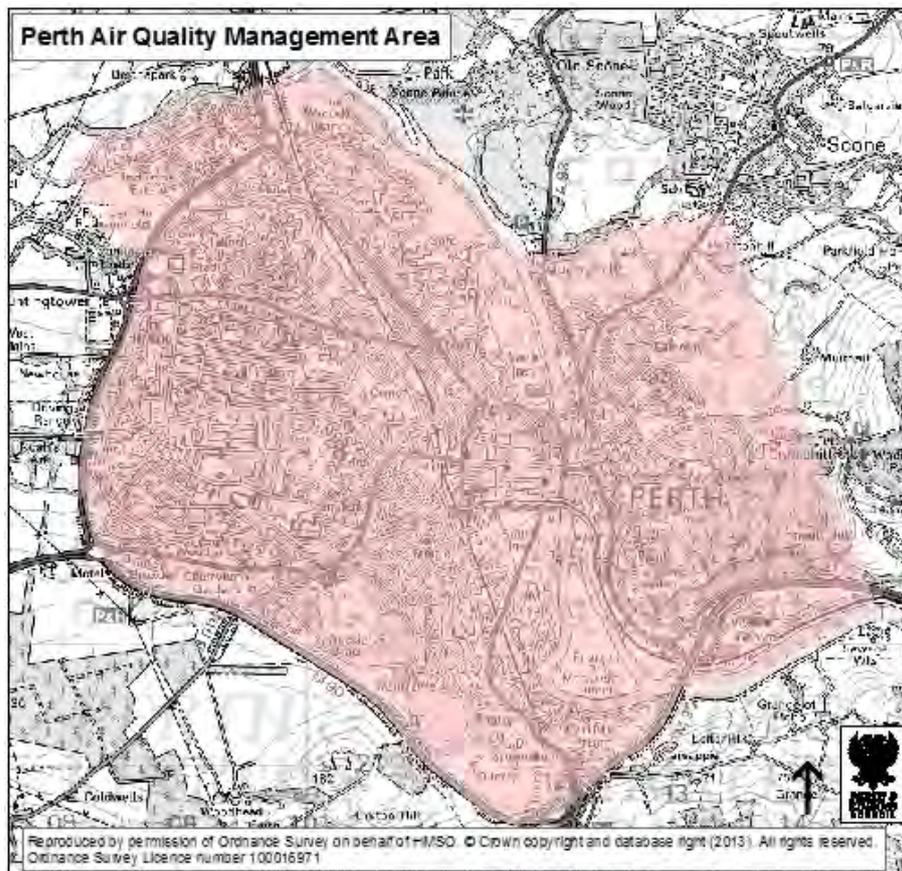
The City Plan reflects the requirement to improve roads and transport infrastructure to enhance connectivity between the city centre and the planned western expansion, the wider region, and the rest of Scotland.

Appendix 2 identifies the key stages in the development of the PTF package demonstrating that the Council's commitment to the Perth Transport Futures Project is clear.

## Appendix 2

**CONGESTION AND AIR QUALITY MANAGEMENT**

Whilst increasing traffic levels have long been recognised as an issue by the mid 2000s monitoring revealed that, at a number of points within the city, air quality fell below European standards. The main cause of degraded air quality was clearly identified as traffic pollution which was exacerbated by congestion. In response to this and as required by The Environment Act 1990 the Council declared an Air Quality Management Area (AQMA). This brought with it a statutory duty to bring forward an action plan to address the issues.



The key congestion problem results from the conflict between local traffic and traffic travelling through the city converging in the centre of Perth to use one of the two existing bridges over the River Tay (Perth Bridge and Queen's Bridge). Other key congestion areas include:

- Trunk Road Network - A9, Inveralmond Roundabout, Broxden Roundabout, A85 (Crieff Road).
- Local approach roads - A93, A94, A90 (Dundee Road).
- Town Centre - Perth Bridge, Queen's Bridge, Glasgow Road, Dunkeld Road, Atholl Street etc.

When there are major incidents, such as the closure of Friarton Bridge due to high winds or major road works, traffic has to divert through the city centre due to the lack of an alternative east-west route. This results in increased journey times of over 1.5 hours for traffic attempting to cross the city. Similar problems are also experienced on event days at Perth Racecourse and Scone Palace. Due to physical constraints, namely the location of the rail line, Kinnoull Hill and the River Tay, future development in Perth and the immediate city-region is primarily concentrated to the north-west of the city centre. As a result, cross-city movements can be expected to increase in the future resulting in the need for the development of the transport network to support the planned development of Perth and the wider region.

Forecasts of transport movements in the area predict that if future land-use developments were to occur with no change to the transport network existing problems would become greater and new transport/movement problems would merge. This means the current network would only be able to support limited development and is expected to have severe operational difficulties before 2015 with gridlock becoming common place.

In addition, the adverse impact on the local economy increasing congestion would also be detrimental to air quality within the city's Air Quality Management Area (AQMA). It would restrict opportunities for any further bus priority and cycling and walking enhancements that would encourage sustainable travel. In summary the key transport problems include:-

- Walking and Cycling – unattractive due to heavily trafficked roads in the city centre and on key routes leading to the centre, air quality problems and severance by the A9 to access to future growth areas.
- Bus network - congestion at key junctions impacting on reliability of journey times and compromising the operation of existing bus priority measures.
- Bus congestion at South Street and Mill Street bus stops.
- Local Road Network - congestion in the city centre due to the constraints imposed on the local road network by the Perth and Queen's Bridges and the lack of a suitable alternative east-west route that avoids the centre of Perth.
- Crieff Road /Newhouse Road to the north-west of the city centre also experiences congestion.
- Air Quality – Perth AQMA designated in Perth city centre and wider city region in 2006 as a result of air quality being below the required standards with transport identified as a key contributing factor.

### **Traffic Modelling**

Perth and Kinross Council appointed the transport consultants SIAS to undertake a Perth wide traffic modelling exercise using S-Paramics. S-Paramics is a micro simulation modelling tool that models individual vehicle movements throughout their entire trip across the entire model.

The modelling work undertaken looks at the existing network and applies predicted increases in traffic through both new developments and the background increase in traffic (as determined by the National Road Traffic Forecast) and can assess proposed changes to the road network in terms of journey time and congestion.

The model used by Perth and Kinross Council was developed using a wide range of data sources including OS mapping, public transport data, video surveys, traffic signal timings and traffic survey data and is subject to extensive calibration and validation, in line with industry standards and best practice. In addition, the model was reviewed by JMP Consultants on behalf of Transport Scotland who deemed that the calibration and validation for a model of this size seemed reasonable as suitable for application.

The S-Paramics model was an integral part of the appraisals undertaken and the ongoing design work for the A9/A85 junction improvement project and the overall Cross Tay Link Road (including the Perth City Enhancements package). The visual outputs from the scenarios clearly demonstrate both the scale of the existing and potential traffic issues facing Perth and the positive impact the proposed solutions will provide. In addition, these solutions have been tested by adding traffic likely to be generated by potential land use scenarios and proposed developments to confirm that they can provide a medium to long term solution for Perth.

## VALUE/COST ANALYSIS

Roads benefits - These can be summarised as:

- An upgraded A9/A85 junction providing for better flow of both local and through traffic and easier connections to Inveralmond.
- A second major access to Inveralmond will relieve pressure on this junction at peak times
- Improved pedestrian and cycle safety over A9.
- Reduction of journey times on the local transport network and increased network capacity.
- A vital first link in potential A9/A94 link road and 3<sup>rd</sup> Tay Crossing, so further enhancing the transport network in and around Perth.
- Expansion of Perth as envisaged in the Proposed Local Development Plan.
- Improved amenity for residents and businesses in the Crieff Road corridor.
- A positive contribution towards meeting the objectives of the Council's AQMA within both the Crieff Road Corridor and wider Perth
- Potential for the creation of between 3,000 – 5,000 jobs through the opening up of development land

Value/cost analysis - A detailed analysis of the junction upgrade scheme was carried out and this showed that there would be significant time savings on the network and a consequent reduction in congestion in both the AM and PM peaks.

An economic assessment of the costs and benefits of the scheme was also carried out as part of a detailed DMRB part 2 assessment of the scheme. This showed that the scheme could deliver a Benefit to cost ratio (BCR) of 4.4 over a 30 year period equating to an Net Present Value (NPV) of £33.70m. These figures are as a result of standard methods of economic assessment applied to transport improvement schemes. In simple terms a BCR of 1 means the scheme has benefits that equal its overall costs. The output from this analysis shows a BCR of 4.4 which is indicative of a highly cost effective scheme. This type of detail and analysis is critical in any request for Scottish Government funding.

Clearly it can be seen that the scheme will deliver significant benefits to the area, not only in terms of reduced journey times, but also with regard to air quality and the unlocking of significant development land and can therefore make a major contribution towards the wider aims of the Council and its Corporate Plan.

Other benefits - The proposals for the A9/A85 works will also enable the opening up of land allocated in the Proposed Local Development Plan for employment use and an opportunity site for employment or retail use, both of which are adjacent to the A9 and A85. The economic benefits of these sites being developed for employment use in terms of potential jobs created are as follows:

Table 2

| Site              | Ref | Area | Developable area – 40% (ha & sqm) | Use Class & Employment levels                                                                                                                                            |
|-------------------|-----|------|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ruthvenfield Road | E38 | 25ha | 10 ha = 40,000 sqm                | Class 4 (Light Industry): 851 FTE<br>Class 5 (General Industrial): 1,111 FTE<br>Class 6 (Storage & Distribution): 571 FTE<br>Class 4 (Office - Business Park): 4,000 FTE |
| Newton Farm       | Op7 | 6ha  | 2.4ha = 9,600 sqm                 | Class 4 (Light Industry): 260 FTE<br>Class 6 (Storage & Distribution): 137 FTE<br>Class 4 (Office - Business Park): 960 FTE<br>Class 1 (Retail): 565 FTE                 |

*FTE = Full Time Equivalent*

Notes:

Development Plans allocate land for employment in hectares and a common development density of 40% is assumed (Business Land Need Study by Oxford Economics 2008) because of the amount of land that will be required for roads, access, parking, deliveries, waste, drainage, landscaping etc.

This figure is then converted to square metres to estimate the amount floorspace that should be created. From this the expected employment levels of such floorspace for different uses can be calculated using the Employment Densities Guide (2010) by the UK Government.

## Appendix 4a

**LOANS FUND - Updated Projections**

| (£'000)                              | <u>2012/13</u> | <u>2013/14</u> | <u>2014/15</u> | <u>2015/16</u> | <u>2016/17</u> | <u>2017/18</u> | <u>2018/19</u> | <u>2019/20</u> | <u>2020/21</u> | <u>2021/22</u> | <u>2022/23</u> | <u>2023/24</u> | <u>2024/25</u> | <u>2025/26</u> |
|--------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Loans Fund Budget                    | 13,137         | 12,714         | 13,405         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         |
| Estimated General Fund Loan Charges* | 12,742         | 12,692         | 13,398         | 14,674         | 16,246         | 17,562         | 18,492         | 19,585         | 20,386         | 20,975         | 21,785         | 22,031         | 21,868         | 21,849         |
| Transfer To/(From) the Capital Fund  | 395            | 22             | 7              | 1,322          | (250)          | (1,566)        | (2,496)        | (3,589)        | (4,390)        | (4,979)        | (5,789)        | (6,035)        | (1,517)        | (1,265)        |
| Loans Fund Budget Surplus/(Deficit)  | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | (4,355)        | (4,588)        |

\* based on applying Statutory Guidance

|                                  |        |        |        |        |        |       |        |        |        |        |        |        |        |        |
|----------------------------------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|--------|--------|
| Estimated CLF Interest Rate      | 3.32%  | 3.28%  | 2.85%  | 2.81%  | 2.98%  | 3.08% | 3.21%  | 3.38%  | 3.55%  | 3.64%  | 3.79%  | 3.86%  | 3.88%  | 3.90%  |
| New Composite Borrowing Included | 15,556 | 36,179 | 34,943 | 23,556 | 22,431 | 7,407 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 |

(estimates for HRA and Prudential Borrowing have also been included in overall Loans Fund assumptions in all years)

**Notes:**

- 1 New borrowing estimates are per latest Capital Monitoring to 2016/17 on the Core General Fund Programme
- 2 A further **£12M** new borrowing had been assumed from 2017/18 on the Core General Fund Programme
- 3 A further £100K of contributions has been assumed each year, which reduces the borrowing on historic expenditure

## APPENDIX 4b

**LOANS FUND - Updated Projections**

| (£'000)                              | <u>2012/13</u> | <u>2013/14</u> | <u>2014/15</u> | <u>2015/16</u> | <u>2016/17</u> | <u>2017/18</u> | <u>2018/19</u> | <u>2019/20</u> | <u>2020/21</u> | <u>2021/22</u> | <u>2022/23</u> | <u>2023/24</u> | <u>2024/25</u> | <u>2025/26</u> |
|--------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Loans Fund Budget                    | 13,137         | 12,714         | 13,405         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         |
| Estimated General Fund Loan Charges* | 12,742         | 12,693         | 13,383         | 14,831         | 16,942         | 18,543         | 19,486         | 20,596         | 21,413         | 22,013         | 22,839         | 23,096         | 22,943         | 22,933         |
| Transfer To/(From) the Capital Fund  | 395            | 21             | 22             | 1,165          | (946)          | (2,547)        | (3,490)        | (4,600)        | (5,417)        | (6,017)        | (3,999)        | (1,265)        | (1,265)        | (1,265)        |
| Loans Fund Budget Surplus/(Deficit)  | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | (2,844)        | (5,835)        | (5,682)        | (5,672)        |

\* based on applying Statutory Guidance

|                                  |        |        |        |        |        |       |        |        |        |        |        |        |        |        |
|----------------------------------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|--------|--------|
| Estimated CLF Interest Rate      | 3.32%  | 3.28%  | 2.84%  | 2.83%  | 3.02%  | 3.11% | 3.23%  | 3.39%  | 3.55%  | 3.63%  | 3.77%  | 3.84%  | 3.86%  | 3.88%  |
| New Composite Borrowing Included | 15,556 | 36,279 | 33,763 | 36,556 | 31,431 | 7,407 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 |

(estimates for HRA and Prudential Borrowing have also been included in overall Loans Fund assumptions in all years)

**Notes:**

- 1 New borrowing estimates are per latest Capital Monitoring to 2016/17 on the Core General Fund Programme
- 2 A further £12M new borrowing had been assumed from 2017/18 on the Core General Fund Programme
- 3 A further £100K of contributions has been assumed each year, which reduces the borrowing on historic expenditure
- 4 Includes £23.5M for A9/A85 Junction improvements, less £400K already budgeted and £2.18M contribution

## Appendix 4c

**LOANS FUND - Updated Projections**

| (£'000)                              | <u>2012/13</u> | <u>2013/14</u> | <u>2014/15</u> | <u>2015/16</u> | <u>2016/17</u> | <u>2017/18</u> | <u>2018/19</u> | <u>2019/20</u> | <u>2020/21</u> | <u>2021/22</u> | <u>2022/23</u> | <u>2023/24</u> | <u>2024/25</u> | <u>2025/26</u> |
|--------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Loans Fund Budget                    | 13,137         | 12,714         | 13,405         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         | 15,996         |
| Estimated General Fund Loan Charges* | 12,742         | 12,693         | 13,383         | 14,729         | 16,570         | 18,028         | 18,964         | 20,066         | 20,875         | 21,468         | 22,286         | 22,537         | 22,379         | 22,364         |
| Transfer To/(From) the Capital Fund  | 395            | 21             | 22             | 1,267          | (574)          | (2,032)        | (2,968)        | (4,070)        | (4,879)        | (5,472)        | (6,290)        | (2,532)        | (1,265)        | (1,265)        |
| Loans Fund Budget Surplus/(Deficit)  | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | 0              | (4,009)        | (5,118)        | (5,103)        |

\* based on applying Statutory Guidance

|                                  |        |        |        |        |        |       |        |        |        |        |        |        |        |        |
|----------------------------------|--------|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|--------|--------|
| Estimated CLF Interest Rate      | 3.32%  | 3.28%  | 2.84%  | 2.82%  | 3.00%  | 3.09% | 3.22%  | 3.38%  | 3.55%  | 3.63%  | 3.78%  | 3.85%  | 3.87%  | 3.89%  |
| New Composite Borrowing Included | 15,556 | 36,279 | 33,763 | 30,056 | 26,931 | 7,407 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 | 11,900 |

(estimates for HRA and Prudential Borrowing have also been included in overall Loans Fund assumptions in all years)

**Notes:**

- 1 New borrowing estimates are per latest Capital Monitoring to 2016/17 on the Core General Fund Programme
- 2 A further £12M new borrowing had been assumed from 2017/18 on the Core General Fund Programme
- 3 A further £100K of contributions has been assumed each year, which reduces the borrowing on historic expenditure
- 4 Includes £23.5M for A9/A85 Junction improvements, less £400K already budgeted, £2.18M contribution, and 50% funding (£11M) of the balance

## Perth and Kinross Local Development Plan Examination - Scottish Government Written Submissions

**6. Paragraph 2.7 of Schedule 4 Document 446 estimates that 40% of the overall transport infrastructure costs can be met from “other funding mechanisms including working with government bodies to bring forward funding.” What is the basis for this confidence and what specific mechanisms are anticipated? Does the absence of any commitment to CTRL in the Strategic Transport Projects Review (STPR) indicate that this project is regarded as one of local rather than strategic importance and does this have implications for access to government funding? What confidence is there in the ability of the development industry to fund the other 60% of the overall transport infrastructure costs over the next 30 years?**

The STPR gave specific consideration to a proposal for a ‘New crossing of the Tay linking the A9 to the A94 north of Scone’. As the scheme would not significantly contribute to national objectives it was sifted out of the STPR process. It was noted that it could be considered further by the local authority or regional transport partnership.

The CTRL and the other transport infrastructure outlined within the Perth and Kinross Developer Contributions Supplementary Guidance are local road projects. The Scottish Government currently has no plans to provide funding towards them.

**10. Is Transport Scotland’s only concern with the CTRL to ensure a 1 km junction separation from the Inveralmond junction?**

The Cross Tay Link Road is a local road project and it is for Perth and Kinross Council to promote and deliver as they consider appropriate. Transport Scotland fulfil Scottish Ministers role and our primary interest is to ensure that any impacts do not affect the safe and efficient operation of the Trunk Road Network. This includes ensuring that design of any elements, such as a new junction, interfacing with the Trunk Road Network are in accordance with the Design Manual for Roads and Bridges (DMRB). In terms of junction spacing, the appropriate standard is detailed in TD 22/06 Road Geometry, Section 2 Junctions. Paragraph 4.38 details that the minimum length between a grade separated junction and an at-grade junction (including roundabouts), service area, lay-by or direct access must be the desirable minimum weaving length as defined in paragraph 4.36 for rural roads. Paragraph 4.36 details that the desirable minimum weaving length must be 1 kilometre. The length is measured from the end of any ‘slip lane’ tapers. Transport Scotland would be highly unlikely to depart from this mandatory requirement.

The junction spacing requirement would also apply between any north facing ‘slip lanes’ and the existing A9 junction at Luncarty. Perth & Kinross Council have previously raised the possibility of closing the existing A9 Luncarty junction and connecting it into the new CTRL A9 junction which would remove this particular issue. We are not aware what Perth & Kinross Council’s current view on this issue is and how it fits with development proposals in the Luncarty area.

**11. In Core Document 202 “Strategic Transport Projects Review Report 1: Review of Current and Future Network Performance: 6 Performance of the Strategic Nodes” (2008) it appears that the strategic road network around Perth operates reasonably well and that there is not forecast to be significant increases in road congestion. Is this correct? Does this take account of planned increases in the size of Perth? (there is reference to new housing planned for Perth on para 6.2.10).**

The STPR analysis was based on the 2005 Transport Model for Scotland which included information on land allocations supplied by local planning authorities at that time. The model considers land allocations at a strategic level, hence it is not possible to identify the take up of individual sites.

Notwithstanding this, STPR states within Report 1 that “Congestion at the M90 / A9 Broxden Roundabout and the A9 / A912 Inveralmond Roundabout is significant, and arises out of conflict between local access needs and long-distance travel demands between the central belt and the north of Scotland”, “through traffic can be constrained by congestion at the Broxden A9/M90 roundabout” and that “Over the period to 2022, areas of congestion are forecast to intensify on the approaches to the urban area.”

The STPR Final Report identified that the “grade separation of Keir, Broxden and Inveralmond Roundabouts would remove the congestion at these locations contributing to reduced journey times, improved journey time reliability and improved road safety.”

<http://www.transportscotland.gov.uk/strategy-and-research/publications-and-consultations/j11260a-00.htm>

**12. What is known at this stage of the archaeological investigation and landscape impact mitigation that will be required for the proposed CTRL route? What cost and timing implications these have?**

In response to the proposed CTRL route included in the Proposed Perth and Kinross Local Development Plan, Historic Scotland noted that “the proposed Link Road will have a significant impact on the designed landscape and on the prehistoric and Roman archaeological remains” and that “a substantial programme of mitigation and archaeological investigation will be required in the delivery of the Link Road”. The mitigation strategy for the road would require to consider both the archaeological impact and that on the Scone Palace designed landscape. It would be beneficial therefore to consider these two issues separately.

The following comments reflect that there is no definitive information at this stage regarding the exact route and required works for the CTRL.

In terms of archaeological investigation and mitigation at this stage we know the route runs amongst the remains of prehistoric settlements and Roman camps. The land would always have sustained an agricultural population so we must infer there

are more archaeological remains awaiting discovery in the area. In light of this the works that will likely be required are:

1. an investigation to assess the location, nature and extent of unknown archaeology likely to be affected by road construction (i.e. the footprints of the road line, junctions, side road amendments, borrow pits, works compounds, SUDs ponds, embankments, cuttings and landscaping).
2. a suite of mitigation measures which will balance the loss of the archaeological resource by the acquisition of information and knowledge.

To judge from comparable landscapes and similar road schemes a cost of these works would likely equate to a minimum of 1% of budget, in our experience. This can often rise to at least 5% dependant on the nature of the archaeology discovered in the course of the project. It is our experience that costs are best controlled by front-loading the work well in advance of construction by careful project management. This can minimise time and cost risks within the construction phase.

For the landscape impact mitigation as it relates to the Scone Palace Inventory designed landscape, Historic Scotland has been advising the Council's consultants in their preparation of a Historic Landscape Assessment. This assessment aims to evaluate the historic landscape in order to ensure that the full impact of the road on the character of the designed landscape is understood. While no mitigation strategy is in place yet this is likely to be based on the avoidance of key elements of the designed landscape and the minimal intrusion of associated components such as lighting, noise/tree screening and signage. The nature of this mitigation strategy would likely be of minimal cost with these considerations being front-loaded into the design phase of the road.

***25. How would the southern H70 access work? From Broxden roundabout? If so, with or without grade separation? Is Transport Scotland content with an access from Broxden?***

Transport Scotland has recently received from the Lamberkine Trust, the 'Perth West Masterplan Transportation Review, Sam Shortt Consulting, 25th April 2013'. It proposes the construction of a new grade separated junction in the vicinity of Windyedge and the closure of the existing Tibbermore junction and seven other minor junctions between there and Broxden roundabout. The provision of dedicated left turn lanes at Broxden is also proposed. The document also states that these upgrades can be delivered and funded by the Lamberkin Trust.

Transport Scotland is content to accept the principle of a new grade separated junction on the A9 and the closure of the existing junctions subject to more detailed examination and approval by Transport Scotland at the Development Management stage. The proposed mitigation at Broxden had not been agreed since Transport Scotland require to understand the effects of the full LDP allocations at this location. For the avoidance of doubt, Transport Scotland would not accept a new access directly onto the Broxden roundabout.

**26. If there is to be an access to the A9 from west of the Broxden roundabout is there any flexibility on the normal minimum 1 km junction separation?**

No, see the answer to question 10 above for more information.

**27. H70 was initially discounted as an option because of adverse roads implications. Is this correct? If so, what has changed the authority's mind?**

The Scottish Government is not party to Perth and Kinross Council's decision making process that led to site H70 being included within the Proposed Plan. Within the Main Issues Report the Perth West allocation was not included as the site at Almond Valley was the council's preferred option at that time. However, it was noted that this position changed when the Proposed Plan was published which included Perth West and not Almond Valley.

As no access strategy or transportation information was available for the Perth West site at the publication of the Proposed Plan, a representation was submitted by the Scottish Government.

The answer to 25 above notes that Transport Scotland has now received a Transportation Review from Lamberkine Trust and has accepted the principle of a new junction on the A9.

However, the Transportation Review from Lamberkine Trust focuses on the southern part of the H70 and does not allow a full understanding of the implications of the full H70 site.

Transport Scotland has just received further information from Perth & Kinross Council regarding the wider implications of the Local Development Plan spatial strategy including the entirety of site H70. Transport Scotland has requested further detail of the work undertaken to enable a fully informed view to be taken.

**30. For the southern half of H70 there is an offer from the developer (in Appendix 2 to representation 09166/16) to provide two left turn slip roads on the Broxden roundabout. Would this be unnecessary if grade separation is to take place? If so, would other works/contribution be appropriate in order to ensure "no net detriment"?**

In capacity terms, it is likely that the proposed left turn slip lanes would be superseded by the grade separation of Broxden. However if the southern part of H70 is to come forward in advance of grade separation of Broxden then an appropriate scheme of mitigation would be required at Broxden and this would require to be agreed with Transport Scotland.

There is no delivery timetable or design for grade separating Broxden roundabout. Any such design will take account of the layout and operation of trunk road network at the time it is being considered.

**31. What is the nature of Transport Scotland's current study on the A9 between Kier roundabout and Luncarty due to report in June, and what implications might this have for the proposed western expansion of Perth?**

The study is a review of the operation of the existing A9 dual carriageway between Keir Roundabout and Luncarty.

The study is in two parts, the first and larger part is a design exercise looking at the road layout and junctions between Stirling and Perth, seeking to improve safety by identifying the most appropriate locations for grade separated junctions to allow the closure of all central reserve gaps along the route.

There is no timing or funding commitment to the implementation of any of the recommendations, rather the study will inform future programming of investment along the route.

The second part is a high level initial appraisal following STAG principles, considering how to improve the dual carriageway around Perth works by cutting the number and severity of accidents, improving journey times, reducing driver frustration and tackling congestion. It will be informed by the land use and associated infrastructure identified in Perth & Kinross Council's LDP. Hence it will not be possible to finalise the study until after the completion of the examination process and the subsequent adoption of the LDP. There is no timing or funding commitment to the progressing onto detailed appraisal of any identified options.

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Your ref:

Our ref:  
PKC/LDP

Date:  
17 July 2013

Dear ██████████

## **PERTH AND KINROSS PROPOSED LOCAL DEVELOPMENT PLAN**

**Perth area housing sites and road issues – matters to be discussed in a hearing session on 25 July 2013**

Please find below the Transport Scotland responses to the questions raised by the Reporter in advance of the hearing session on the 25<sup>th</sup> of July 2013. We have endeavoured to provide as full an answer to each question as possible but have referred specific questions on Council policy and planning matters to Perth and Kinross Council.

- 1 Whether it is possible, without modifying the size or shape of site H70 from that defined in the proposed plan, to gain access to the site from the A9 west of Broxden roundabout.***

Transport Scotland understands that the junction form suggested in the Lamberkine Trust proposals would require land outside the current boundary of the H70 site. The required junction spacing for a new access will be 1km in accordance with the Design Manual for Roads and Bridges and this will place any new junction on the A9 west of the Broxden roundabout outside of the current H70 boundary. Land would be required on both sides of the A9 to allow such a junction to be formed.

- 2 If the reporter were minded to support the proposed westward extension of H70, on what basis could he recommend modification of the plan so that it incorporated that change, given that this was not publicised as an option in the Main Issues Report, was not included in the proposed plan***

**and was not considered in the plan's strategic environmental assessment?**

Transport Scotland would refer this question to Perth and Kinross Council as the Planning and Authority for the area.

**3 Setting aside the issue of how a development of the southern portion of site H70 would be integrated with the remainder of that site and with existing and proposed features in the locality, such as the proposed Crieff Road supermarket, is the council content with the proposed westward extension of site H70?**

Transport Scotland would refer this question to Perth and Kinross Council as the Planning Authority for the area.

**4 Would Transport Scotland be content with an initial 1500 unit phase of site H70 that was accessed from the A9 west of Broxden in the manner that has been proposed if that development did not (at least in the short term) have any vehicular connection with the remainder of site H70?**

Lamberkine Trust commissioned SIAS to undertake traffic modelling of a number of development scenarios with the sole site access taken from a new grade separated junction west of Broxden. A specific scenario test has not been undertaken which comprises an initial phase of 1,500 units defining what level of mitigation is required at the local or wider area junctions. However, in order to provide as best an informed response to this question it is worthwhile examining two scenarios which have been tested and these have been summarised below:

| <p>Potential Mitigation at Broxden</p> <p>Modelling Scenario</p>                                                                                                   | Full Signalisation | Segregated Left Turn Lane from A9S to A9N | Segregated Left Turn Lane from M90 to A9S | M90 Flare to 3 Lane Approach | M90 Extended 3 Lane Flare | A9N Extended 3 Lane Flare | A9S 3 Lane Entry |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-------------------------------------------|-------------------------------------------|------------------------------|---------------------------|---------------------------|------------------|
| (i) 1,500 houses, primary school, 10,000 sq.ft. each of commercial and retail uses. Including A9/A85 junction upgrade but no cross Tay Link Road. Model year 2025. | ✓                  | ✓                                         |                                           | ✓                            |                           |                           |                  |
| (ii) Full LDP allocations. Model year 2033                                                                                                                         | ✓                  | ✓                                         | ✓                                         | ✓                            | ✓                         | ✓                         | ✓                |

The results of the 1,500 unit, 2025 scenario indicate that the impact on Broxden roundabout of this scale of development supported by the lesser mitigation package is unacceptable, with significant delays experienced on all approaches to the junction.

The results of the 2033 full LDP modelling scenario, supported by the greater mitigation package, indicates that while some queues increase at Broxden, a no net detriment solution for the junction as a whole is achieved.

Given the outcomes of the two scenarios detailed above, it is reasonable for Transport Scotland to assume at this stage that an initial phase of 1,500 units including the full package of mitigation measures at Broxden roundabout, detailed in scenario (ii), can be accommodated in a capacity context.

It is important to note that the proposed mitigation measures are currently only considered in a modelling context and would require to be designed in accordance with DMRB. The access and mitigation would have considerable land take implications on both sides of the A9 at the proposed new junction and on approach to and around the Broxden roundabout junction.

It should also be noted that timescales for the delivery of a new grade separated junction and/or the extensive mitigation to the Broxden roundabout junction through the statutory approvals and construction process would most likely be in excess of 5 years. The cost to the developer of implementing the works outlined is likely to be significant.

Prior to Transport Scotland accepting any proposals for the site, a full Transport Assessment which included consideration of the wider impacts of the development proposals, phasing and the appropriate provision of mitigation at each stage would be required. This assessment should consider the trunk road and, presumably, local road networks.

Each phase of the H70 site and the development of the area as a whole will need to comply with local and national planning and transport policy in terms of connectivity and sustainability. As submitted previously, Transport Scotland supports Policy TA1 of the Proposed Local Development Plan for the Transport Standards and Accessibility requirements. This policy is aligned appropriately with Scottish Planning Policy in that it endeavours to reduce travel demand by car, and direct people towards walking, cycling and increased use of public transport. It is noted that current Perth and Kinross Roads Design Standards require more than one access for residential developments with over 300 units.

In summary, Transport Scotland accepts the principal of the approach with respect to traffic capacity but cannot comment further at this stage until the details are provided as part of the future processes.

If you should you require any further information then please contact me at the above telephone number or by email.

Yours sincerely,

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