

Planning, Infrastructure and Place Advisory Group: Agenda

Meeting No: 3
Date and Time: 12th December 2023 10:00-14:00 [ONLINE ONLY]
Place: Winchburgh

Attendees

Joint Chairs

Fiona Simpson, Scottish Government

Tony Rose, Scottish Futures Trust

Core Group

Richard Ballantyne, British Ports

Susan Campbell, Scottish National Investment Bank

David Cowan, Scottish Government

Iain Docherty, Stirling University

Pam Ewen, Heads of Planning Scotland

John Hamilton, Winchburgh Developments

Martin McKay, Clyde Gateway

Ailsa Raeburn, Community Land Scotland

Pauline Smith, Development Trust Association Scotland

John Trower, Optiminity

Kat White, Scottish Government

Soren Jensen, Infrastructure Transparency

Hamish Trench, Scottish Land Commission

Scott Mathieson, Scottish Power Energy Networks

Rachel Skinner, WSP

Support

Lorna Aird, Scottish Government

Lynne Ward, Scottish Futures Trust

Katie Ferrie, Scottish Futures Trust

Greg Walker, Scottish Government

Apologies

Jane Wood, Homes for Scotland

Francesca Osowska, Nature Scot

Suzanne Stephen, Scottish Government

AGENDA

| | Item | Topic | Section | Pages |
|--------------------------|------|--|--|-------|
| 10am | 1.0 | Introduction & Apologies | | |
| | | Whole group discussion | | |
| | 2.0 | Minute of Previous Meeting | Section 1 | 3-5 |
| | | Whole group discussion | | |
| | 3.0 | Action from Previous Meeting | Section 1 | 6 |
| | | Whole group discussion | | |
| 10:15 | 4.0 | Winchburgh Discussion Whole group discussion (paper circulated in advance) <ul style="list-style-type: none"> - Review of paper - Do conclusions look about right? - Steering group present approach to next steps. Seek views of the group on whether it feels right. | Winchburgh Template section 2 | 7-15 |
| 11:15 | 5.0 | LDP Deepdive <ul style="list-style-type: none"> - Presentation on LDPs and infrastructure (Carrie Thomson) - Discussion on issues surrounding LDPs as they relate to PIPAG priorities. | N/A | N/A |
| 12:00 LUNCH BREAK | | | | |
| 12:30 | 6.0 | Work Program Discussion | | |
| | | Presentation from the steering group Agreement of the work programme: <ul style="list-style-type: none"> - Agreement of Issues - Agreement of locations - Discussion of the role of sub groups - Discussion of the form of outputs | Powerpoint slides Section 3 | 16-31 |
| 2.00 | 10. | AOB and close | | |

Section 1 – Minutes and Action from Previous Meeting (Winchburgh)

| Item | Topic | Action |
|------------|--|---|
| 1.0 | Introduction & Site Visit Discussion | |
| | <p>John was thanked for organising the site tour and commended for the progress they have made. The meeting order was changed, with the site visit discussion following.</p> <p>There was an engaged conversation, with a number of questions. In capturing this discussion the template will be completed, with consideration as to what questions could be taken forward, perhaps via the Reference Group. The completed template to be presented at the December meeting.</p> | <p>Secretariat: Write up site visit template, to capture discussion.</p> <p>All: Members to provide any relevant Declarations of Interest</p> |
| 2.0 | Minute of Previous Meeting | |
| | No additional points/amendments | |
| 3.0 | Action from Previous Meeting | |
| | <p>Most actions were seen to be actioned, with only a few areas outstanding.</p> <p>Both Jane and Francesca are providing input to the M&E paper.</p> <p>The other outstanding area of having a full development day was raised, with any further thoughts requested.</p> | <p>All: Provide any thoughts on having a full development day.</p> |
| 4.0 | Site Visit Discussion | |
| | Covered under 1.0 | |
| 5.0 | Purpose & Objectives (FOR NOTING ONLY) | |
| | <p>The updated purpose and objectives was highlighted. It was noted that meetings with the members had informed this update, along with the conversation from the previous meeting. This included the meeting schedule, with the model used today anticipated to guide future meetings.</p> <p>There was a broad discussion on what the group is trying to achieve; how to most effectively carry out priorities; and what the timeline of action should be: -</p> <ul style="list-style-type: none"> • While the group is nominally aligned with the timeline of the next Infrastructure Investment Plan, it was felt there needed to be more short-term | <p>All: Any pressing concerns around the updated purpose & objectives to be raised with the Secretariat.</p> <p>All: consider any additional meeting themes, following the structure of today and inform secretariat in advance of Dec meeting</p> <p>All: reflect on the structure of today and whether this works.</p> |

| Item | Topic | Action |
|------------|--|--|
| | <p>priorities and that this wasn't necessarily reflected in the current meeting schedule and related themes. There were noted to be very immediate areas of need such as LDPs where interrogation and collaboration were felt to be important. As such there may be a need to revisit how to best prioritise activity areas. It was noted that there isn't a single way of working as a group. Short to longer-term activity needs to be teased out.</p> <ul style="list-style-type: none"> • How to most effectively use the time the group included discussing whether longer meetings over 1-2 days would be more productive and the possible role of subgroups. It was felt that subgroups could be part of the approach going forward and that the December meeting could help identify initial areas of activity and therefore subgroups. These groups could then agree how they work most effectively. Managing individual resource was noted as important to consider. • Doing an annual report to pull together the work of the group, had been a member proposal at Chair meetings. It was felt that also creating interim outputs and sharing them and not being focused on creating a perfect output was important. This could help in balancing short to longer-term activities. <p>It was agreed that having meetings out with the central belt was important</p> <p>For site visits and reflecting practice, ensuring small developments are covered in the conversation was agreed. It was confirmed a small budget is available to help manage case study visits.</p> | <p>Secretariat: consider further the meeting schedule and key activities (and priorities) in advance of the December meeting.</p> |
| 6.0 | Infrastructure First | |
| | <p>There was insufficient time to discuss the paper in detail. Tony noted it is intended to table some of the key issues.</p> <p>It was noted that the community should be more fully represented in the framing of Infrastructure First. In some areas the community are developers.</p> | <p>All: To forward any comments on paper to Tony</p> |
| 7.0 | NPF4 Delivery Programme (VERBAL UPDATE) | |
| | <p>An update on the delivery programme is due to be published soon.</p> | |

| Item | Topic | Action |
|-------------|---|---------------|
| 8.0 | Monitoring & Evaluation (VERBAL UPDATE) | |
| | Noted under 3.0 | |
| 9.0 | AOB | |
| | PIPAG mentioned in PfG which was felt to be a very positive endorsement of the group role. | |
| 10. | Meeting Schedule | |
| | Discussed under 5.0 | |
| 11. | Close | |
| | It was noted that the next meeting is on 12 th December, to be held online only. | |

ACTIONS FROM PREVIOUS MEETING

| | Arising | Action | By | Due | Status |
|----|---------|--|-------|-------------|-------------|
| 1 | 14/6/23 | Members to provide any relevant Declarations of Interest | Group | By 07/09/23 | Outstanding |
| 2 | 14/6/23 | Refine Paper 1 incorporating as appropriate recommendations and re-circulate for next meeting. | Sec | 07/09/23 | Completed |
| 3 | 14/6/23 | Members to consider volunteering to support development of Monitoring & Evaluation paper, including identifying draft measures of success. | Group | By 07/09/23 | Outstanding |
| 4 | 14/6/23 | The group were asked to advise if they have any issue in the announcement on membership going out later this week. | Group | 19/06/23 | Completed |
| 5 | 14/6/23 | The group were also asked to advise if there was anyone missing from the reference group. | Group | 19/06/23 | Completed |
| 6 | 14/6/23 | Provide written feedback on the papers by end of June, including written feedback on the themes presented in Paper 2 on Infrastructure First, to help evaluate the short, medium and longer term activities for the group. | | 30/06/23 | Completed |
| 7 | 14/6/23 | Update all papers for next meeting, following feedback. | Sec | 07/09/23 | Completed |
| 8 | 14/6/23 | Add agenda item to next meeting on identifying quick wins from the Infra First paper | Sec | 07/09/23 | Completed |
| 9 | 14/6/23 | review whether a full development day can be set up. | Sec | End Dec 23 | Completed |
| 10 | 14/6/23 | identify agenda including possible speakers for the next meeting. | Sec | 07/09/23 | Completed |
| 11 | 7/9/23 | Write up site visit template, to capture Winchburgh discussion | Sec | 12/12/23 | In draft |
| 12 | 7/9/23 | Any final reflections on purpose and objectives to be raised with Secretariat | All | 12/12/23 | Completed |
| 13 | 7/9/23 | Consider any additional meeting themes, following the structure of today and inform secretariat in advance of Dec meeting | All | 12/12/23 | Completed |
| 14 | 7/9/23 | Reflect on the meeting structure and whether the approach taken in September worked | All | 12/12/23 | Completed |
| 15 | 7/9/23 | Consider further the meeting schedule and key activities (and priorities) in advance of the December meeting. | Sec | 12/12/23 | Completed |
| 16 | 7/9/23 | Forward any comments on Infrastructure First Paper to Tony | All | 12/12/23 | Completed |

Section 2- Winchburgh Infrastructure Template (Draft)

WINCHBURGH INFRASTRUCTURE CASE STUDY OCTOBER 2023

INTRODUCTION

PIPAG visited Winchburgh on the 7th September 2023. The group had a tour of the site, led by Winchburgh Developments and gained an insight into the infrastructure challenges and opportunities of the project. This paper provides an overview of the discussion, findings and outcomes.

Scenario Background

Winchburgh Developments Ltd are lead Developers at Winchburgh and lead partners include West Lothian Council, Bellway Homes, Barratt Homes, Taylor Wimpey, Cala, Robertson and J Smart and Co as well as Winchburgh Owners Association.

Winchburgh is a key area which has been identified for growth at the local, regional and national level.

The masterplanned site is at an advanced stage of development including c. 3500 residential units (including 25% affordable), four schools (2 primary, 2 secondary) as well as community facilities (including library and health centre) and transport infrastructure (including new rail station and motorway junction and. 50 acres of commercial and retail development.

The headline challenges and issues raised by this scenario include:

- digital infrastructure
- Funding solutions
- Land remediation
- Schools Infrastructure funding, phasing and delivery
- Implications of energy decarbonisation targets on infrastructure provision
- Transport infrastructure delivery

Winchburgh is typical in the sense that it is a large scale urban expansion. Issues of funding and delivery of infrastructure are also typical in developments of this scale. However, this example particularly demonstrates the benefits of positive collaboration between the developer and the Council, the sharing of investment risk, as well as a developer with close links to the existing local community.

Land values in Winchburgh are likely to be higher than other areas of the country given its proximity to Edinburgh. Indeed, there has been a significant rise in land values since work on the site commenced work, however, they still remain below the Capital.

An application for planning permission in principle was initially submitted in 2005, and approved in 2012, subject to a s75 application. The application outlined 352ha of development including residential, commercial, industrial, recreation & retail uses, community facilities, landscaping & open space, road and rail infrastructure, including M9 junction, train station, park & ride, primary & secondary schools. The masterplan has been adjusted since that time and the development of the site has progressed.

Further homes are being completed at Seton rise, and further retail and commercial space is anticipated around the new motorway junction.

Infrastructure types involved

Economic, social & natural infrastructure: housing, retail, commercial space, education, green & blue, community

Further homes are being completed at Seton rise, and further retail and commercial space is anticipated around the new motorway junction.

This example considers transport infrastructure (roads and rail), education, green and blue infrastructure, community facilities along with heat and energy networks.

The planning permission in principle (PIP) built-in conditions which phased the provision schools, neighbourhood and town parks, and transport infrastructure to ensure alignment and delivery alongside housing provision.

The first phase involved the delivery of 550 houses. During this phase, education contributions went to an existing school in the district before the new schools were delivered on site. Once this cap of 550 houses was reached, planning conditions required that a financing solution was agreed for a non-denominational secondary school.

Significant work went into land remediation at Auldcathie Park to enable it to be a safe and accessible park facility for the community. The former landfill site was required to be fully remediated before occupation of the nearby secondary school. The development management scheme provided for the long term maintenance of landscaping in newly consented areas.

A new motorway junction was required to be in operation before occupation of the 1000th house. Provision of a park and ride was also required by planning condition.

Provision of local / neighbourhood and town parks were conditioned in at various stages of dwellings completions.

The pedestrian crossing delivered at the town centre and the station were examples of using monies from contributions to support local priorities.

Funding

Public & Private: Winchburgh Developments Ltd, Scottish Government, West Lothian Council, National Rail?

In terms of education, funding was sought through the city deal as Winchburgh was identified in the Edinburgh and South East Scotland City region deal signed on 7 August 2018. Scottish Government made a commitment to invest up to £150 million on a risk sharing basis with West Lothian Council to unlock up to 5000 new homes in Winchburgh.

West Lothian Council front funded education and bore the risk of developer contributions not being delivered. Developer contributions meanwhile from across West Lothian were used to fund new schools as the delivery of a new school opened up housing capacity across the district.

However, Scottish Government support was sought from the Finance and Constitution committee as the developer was unable to secure affordable marking rate finance and WLC were carrying the maximum risk allowable under their governance arrangements.

This support was provided through a Tripartite funding agreement to share the risk of funding one of the secondary schools, and the other was a Housing Infrastructure Loan to support financing of extra works covering roads, remediation and a motorway junction to support housing delivery. The Scottish Government standby facility helped to unlock Winchburgh and manage Scottish Government's exposure to risk in a balanced way. (HIF funding excludes schools).

The provision of schools in Winchburgh and developer contributions to education have unlocked housing opportunities across West Lothian.

In this case, offsite strategic infrastructure wasn't required in addition to onsite provision. The park and ride and rail station facility, however, may have a regional impact on transport movements. Early estimates of the cost of a rail station were 2 million but now estimates have gone up to 17 million.

Infrastructure providers involved

Public, Private, Third Sector: Winchburgh Developments Ltd, Network Rail, Scottish Canals, Transport Scotland

Winchburgh developments have been working closely with Network Rail in relation to the rail station. Winchburgh developments undertook land remediation around Auldathie park and work closely with and support community groups. Scottish Canals have been closely involved in plans for the Marina on the Union Canal.

Issues have arisen with the provision of the rail station, as Transport Scotland objected to a condition requiring that no further units would be built until the station was completed at once a particular phase of the development was complete.

Issues and challenges

Energy, transport & digital Infrastructure provision: energy policy targets, airport proximity, delivery models, funding of public infrastructure, economy downturn

Energy

The most difficult issues to resolve have been energy provision for homes in light of decarbonisation targets resulting in increased build costs.

Barriers to delivery included being in the flight path so wind turbines were not an option. Other opportunities for renewable energy were also limited in this case. With regards to electricity, there are challenges around sufficiency of supply within Winchburgh to complete the masterplan. Plans are being made to build a primary substation in Winchburgh although this is not yet agreed.

Land remediation

The increasing costs involved of the rail station, land remediation etc have also been hurdles to be overcome.

Transport

Transport Scotland's stance on conditions relating to the station provision have also been another area requiring negotiation.

This issue was identified early on and was negotiated with Transport Scotland. There was no clause conditioning a development phase on provision of the railway station. An impact report has been produced which investigates the impact of a new rail station at Winchburgh on regional travel.

[Winchburgh Train Station Impact Report and City of Edinburgh Broxburn – Maybury road improvements consultation. - \(winchburghdevelopments.com\)](http://winchburghdevelopments.com)

Education and Finance

Problems were identified early on in the infrastructure lifecycle which meant that adequate funding was called into question. There was a funding gap for the new Schools, as West Lothian Council were already at their funding borrowing capacity.

A Tripartite agreement was prepared between Scottish Ministers, Winchburgh Developments and West Lothian Council. A summary of the agreement was presented to and approved by The Scottish Government Finance & Constitution Committee on 12th September 2018. It covers both the Tripartite Agreement and the £27m loan facility by the Housing Infrastructure Fund. This secured liability for the gathering of financial contributions for the new schools. Amounts drawn by WLC can only be used for the funding of the new school. Scottish Government operates a standby facility and WLC take the risk. Winchburgh developments agree to fill any shortfall in funding. £27 million towards the school was secured from HiF funding. The Council put forward a 60m pound loan for school and Winchburgh Developments took out a £27 million loan. All three primary and secondary school buildings and the Community Wellbeing Hub on Block L have now been completed, and the loan has been fully drawn down for the infrastructure delivery purposes set out in the papers.

Other Issues

Research has indicated that park and rides can increase car km and have a carbon impact. Other key challenges include siloing of infrastructure and schools being a barrier to development.

When the recession hit the business plan needed to be rewritten.

Development finance was challenging, and the significant development timescales have continually influenced progress. When the recession hit the business plan needed to be rewritten.

Worked Solutions

Financing model, planning flexibility & innovation: Tripartite agreement, public/private collaborative approach

This case study demonstrates a range of funding and finance solutions to complex and multifaceted infrastructure challenges.

The Tripartite agreement worked well in that all three primary and secondary school buildings and the Community Wellbeing Hub on Block L have now been completed, and the loan has been fully drawn down for the infrastructure delivery purposes set out in the papers.

West Lothian Council were flexible with requirements around when infrastructure needed to be put in place to enable cash flow. The Council were clear from an early stage on their expectations regarding S75.

The Scottish Government and Scottish Futures Trust helped with the submission to the Finance Committee. Pinsent Mason were also very involved in developing this scheme. Collaborative working was clearly instrumental in this approach working.

Possible Solutions to Explore

Risk Appetite, Alternative Funds: HiF funding access, revenue generation, Infrastructure Levy, S75 flexibility,

Consideration needs to be given to how can risk appetite and mitigation be managed better in the planning system. The core group feel consideration needs to be given to S75a applications, to amend legal agreements, as they can undermine the initial agreement and the Local Authority is often unable to refuse them and there is a perception that refusals would not be upheld at appeal.

West Lothian Council's approach to risk is something that could be considered further with a view to it being replicated by other authorities across Scotland. There may also be scope to develop the development trust model further, to generate income. The core group also suggested that consideration should be given to widening HiF funding to allow for its use for education infrastructure.

The challenging funding landscape will require innovation in finding funding sources. Consideration could be given to potential revenue generation onsite e.g. park and ride.

Looking at the regional picture may also provide funding solution. The role of city and growth deal funding in unlocking opportunities for development at scale.

Further consideration could be given to the role of an infrastructure levy in the up-front funding of infrastructure. A suggestion was made around exploring the potential for a government bond or guarantee scheme that could be funded by an Infrastructure Levy for specific types of infrastructure, with project cost recovery flowing from "standard" S.75 contributions.

The present funding landscape will require innovation to overcome challenges. Consider in detail where all the other funding opportunities are. Consider potential revenue generation

onsite e.g. park and ride. Looking at the regional picture may also provide funding solutions i.e. deals.

Summary Learning points & Action

Funding & Partnership innovation, engagement, Development Management Scheme, Public versus private investment timelines, learning transferability and evolution

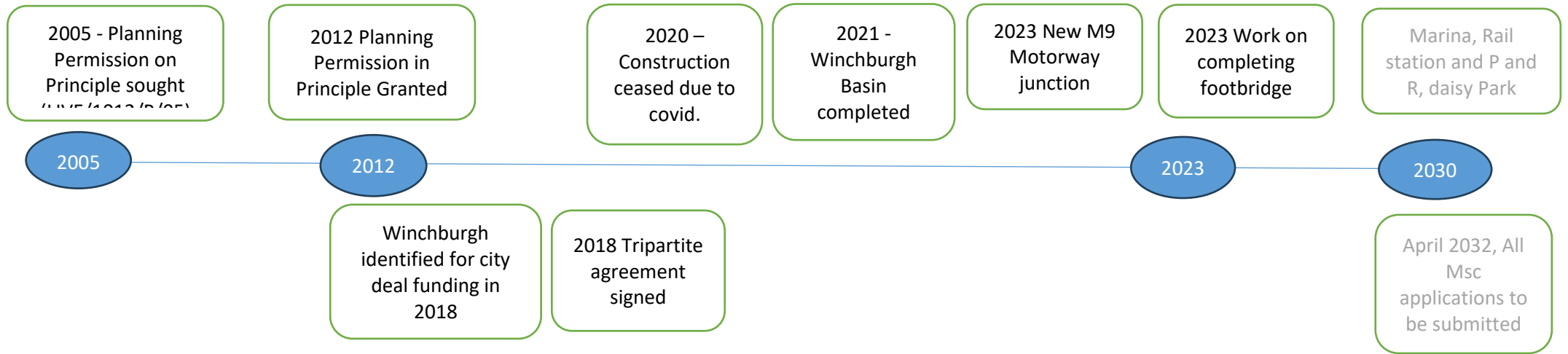
The key learning points from this example are:

1. Innovative funding and finance solutions
2. Positive collaboration between the developer and the Local Authority throughout the course of the project.
3. Education delivery and innovative approaches to funding challenges including a Tripartite funding agreement which required collaboration between the Local Authority, developer and Scottish Government.
4. A positive approach from the developer towards community involvement, maintaining adaptability as the project progressed.
5. Rail station infrastructure delivery challenges
6. Adaptability in the face of national and global pressures in the form of financial crises, pandemic and ambitious decarbonation targets.
7. The importance of the Development Management Scheme to manage the land use and masterplan development.
8. In order to develop recommended solutions and / or good practice advice, it will be necessary to engage with infrastructure providers, Government departments/ agencies, local authority representative groups, specialists. Could practice evolve in response to learning points?
9. Could a government guarantee scheme underpin development funding and could this relate to the infrastructure levy?

Secretariat Actions:

10. Findings to be shared on transforming planning webpages.
11. Core group to agree issues / learning points meriting further exploration and reporting. Secretariat propose that key focus should be on funding mechanisms – those already secured and potential future options.
12. Secretariat to work with lead members of the core group to facilitate input of wider reference group on Winchburgh case study as well as input into specific infrastructure providers.
13. Findings to be reported at a subsequent meeting of the core group during 2024 and incorporated into annual report.

Annex A : Winchburgh Timeline – Issues, Partners, delays milestones



**Annex B: PIPAG SHORT LIFE WORKING GROUP TO CONSIDER LESSONS LEARNED FROM
WINCHBURGH INFRASTRUCTURE DELIVERY MODEL
DRAFT SCOPE, OCTOBER 2023**

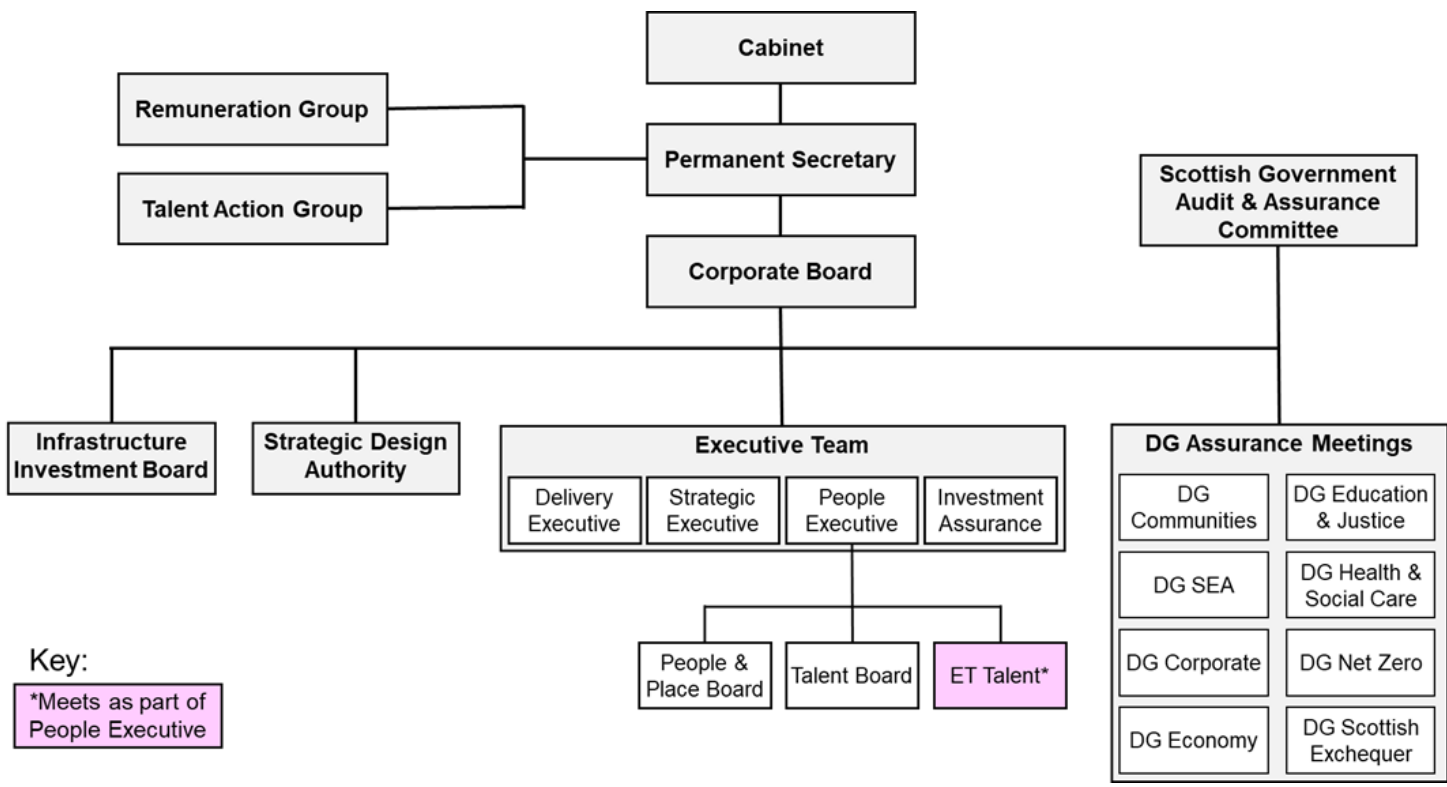
BACKGROUND

Following the PIPAG tour of Winchburgh on 7 September 2023, this paper sets out a proposed scope for a SLWG to further consider the lessons learned from the Winchburgh project and the potential for these to support the delivery of additional strategic development projects in Scotland requiring major infrastructure investment.

| | |
|----------------|--|
| Purpose | <p>In support of the wider objectives of the PIPAG, the SLWG will consider the lessons learned from the Winchburgh Development project in West Lothian and consider whether these can be used to deliver further strategic development projects in Scotland.</p> <p>This will particularly focus on the following aspects of the Winchburgh project;</p> <ul style="list-style-type: none"> - The funding and financing mechanism and risk sharing/leverage - The role of key players – West Lothian Council, The Scottish Government and Winchburgh Developments Limited - The process – brokerage, commercial agreement and governance. |
| Remit | <p>To achieve this purpose, the remit of the Group is to:</p> <ul style="list-style-type: none"> • Understand the structure of the model adopted at Winchburgh and identify key lessons learned (both what worked and what did not) related to the key players, process/governance, challenges, approach to risk sharing, leverage and financial modelling, and outcomes/reflections; • Consider the current, updated, context and what has changed in the intervening period that could impact on the application of key principles/lessons to current projects (e.g., education funding, interest rates, housing market; construction costs; NPF4, NZ/Place/Inclusive economic growth, 20 minute neighbourhoods etc.); • Identify key principles that are relevant and transferable to deliver other potential projects and what this would involve for the key parties (Local Authority, Scottish Government and private sector/developer); • Consider the potential application of those key principles to other projects (e.g. their scope, quantum, ask of each of the parties (Government, Local Authority, Private Sector) and examples of potential projects; • To identify good practice and conditions for success, beyond the commercial structure, from the Winchburgh project relevant to the delivery of other strategic development projects (e.g. community and stakeholder engagement); |

| | |
|-------------------------------------|---|
| | <ul style="list-style-type: none"> Consider overall governance requirements and co-ordination of stakeholders involved. |
| Organisation | The group will meet [2 – 3] times over a six [or four] month] period. It will provide updates on progress to PIPAG and a final report with recommendations for discussion with the PIPAG group and subsequent report to Government [and potentially other key stakeholders as appropriate?]. |
| Membership | <p>The Group will contain representatives from the PIPAG group who are willing to be involved in the SLWG and interested in furthering their understanding of the Winchburgh model and its potential application to other projects. The membership is likely to be limited to [2/3] PIPAG members and [2/3] reference group members.</p> <p>The SLWG may also draw on the experience and expertise of other relevant individuals involved in the project (e.g. from West Lothian Council) as deemed appropriate.</p> <p>The group would be supported with appropriate and experienced resource from the wider PIPAG secretariat, including representatives from SFT’s Real Estate Team who participated in the Winchburgh project.</p> |
| Governance and Communication | All members of the Group must recognise the potential for conflict of interest policy and to enter into non-disclosure agreements where required in relation to commercial in confidence agreements which are made available if appropriate |
| Proposed Tasks | <p>The work plan will be discussed with the SLWG and it is anticipated that key tasks are likely to include;</p> <ol style="list-style-type: none"> 1. Kick-off meeting – agree the scope/task and detailed work plan; 2. First workshop meeting – develop common understanding of key elements of the project, disseminate and discuss key principles and learning from the Winchburgh project, [and potential gaps/further work for further exploration]; 3. Second workshop meeting – to review and develop findings from initial workshop and discuss current context and potential application of lessons learned/key principles; 4. Review of draft paper/outcomes and recommendations; 5. Final review meeting– presentation of final outcomes and discussion on next steps (PIPAG, Scottish Government etc). |

Section 3- Work Programme discussion



- Global Climate Emergency Board
- Climate Change DD Group
- Land Use Transformation Board
- Scottish Biodiversity Programme Board
- National Marine Plan 2 Programme Board
- Place and Wellbeing Group
- Place Directors Network
- High Level Group on Planning Performance + Applicants Subgroup
- Key Agencies Group

| Challenges / ‘Exam questions’ | Notes |
|--|--|
| Infrastructure first approach – what is it and how can it help? | <ul style="list-style-type: none"> ● Meaning / definitions ● Expectations for the planning system ● Implications for delivery partners ● Link with the investment hierarchy |
| Housing delivery – how can we support / facilitate delivery at pace and at scale? | <ul style="list-style-type: none"> ● Sequencing of infrastructure delivery to support development ● Moving from allocated sites to build out – understanding the steps and barriers to delivery ● Viability and infrastructure funding requirements ● Varying scales of delivery |
| Education infrastructure – can we find better / more consistent ways to plan and deliver schools more effectively? | <ul style="list-style-type: none"> ● Methods for calculating capacity and requirements ● Funding and financing options |
| Transport infrastructure – what does good look like in the context of net zero? | <ul style="list-style-type: none"> ● Shift required to achieve net zero / reduce car kilometres ● Business case for new stations ● Active travel infrastructure |

| Challenges / 'Exam questions' | Notes |
|---|--|
| Community / rural development – how do we bring communities with us and what is their role? | <ul style="list-style-type: none">● Role of community infrastructure● Communities as a delivery partner● Asset ownership● Community involvement● Role of landowners● Community led housing● Unlocking rural land for development● Rural service provision● Opportunities arising from community benefit from renewable energy● Smaller scale development and infrastructure● Role of local place plans |

| Challenges / 'Exam questions' | Notes |
|---|--|
| City / town centre regeneration – what infrastructure is required to repurpose town centres and how can it be delivered? | <ul style="list-style-type: none"> ● Infrastructure requirements to support town centre living ● Challenging sites e.g. flood risk |
| Green and blue infrastructure – how can this be an integral part of infrastructure provision rather than an add on? | <ul style="list-style-type: none"> ● Opportunities to integrate with development and 'hard' infrastructure |
| Vacant and derelict land redevelopment – what are the barriers and how have they been overcome? | <ul style="list-style-type: none"> ● Funding and finance to unlock land e.g. through remediation |
| Large scale port infrastructure / development related to offshore wind – how can we ensure we don't miss opportunities for rural development arising from economic opportunities? | <ul style="list-style-type: none"> ● Associated rural housing requirements ● Opportunities for place making |

| Challenges / 'Exam questions' | Notes |
|--|--|
| <p>Funding and finance – who pays and how?</p> | <ul style="list-style-type: none"> ● Opportunities for front-funding ● Public and private sector investment working together ● How can we develop investable propositions? ● Can we find ways to secure investment in infrastructure to support place-based delivery? ● Section 75 in practice – opportunities and limitations ● Opportunities arising from infrastructure levy ● Investor requirements |
| <p>Co-ordination – how do we bring infrastructure requirements together to achieve place based approaches?</p> | <ul style="list-style-type: none"> ● Bringing together different infrastructure types and providers / interdependencies ● Sequencing and phasing ● Front funding ● Approach risk – sharing and public sector appetite for risk |

| Challenges / 'Exam questions' | Notes |
|--|---|
| Skills, resourcing and capacity – how do we overcome capacity constraints? | <ul style="list-style-type: none">● Opportunities to overcome capacity constraints● Smarter ways of working● Collaboration● Accessing specialist skills |
| Local development planning – what's expected and how can we promote good practice? | <ul style="list-style-type: none">● Good practice● Evidence reports / sources of information● Capacity assessment● Delivery programmes● Masterplan consent areas? |
| Sustainability – do we need to think differently to achieve more sustainable outcomes? | <ul style="list-style-type: none">● Refurbishment vs new provision |

Proposed locations

- Town Centre example – Selkirk / Hawick?
- Port of Cromarty / Highland
- Granton, Edinburgh
- Green infrastructure example
- ‘Typical’ medium sized / urban edge development
- Clyde Gateway
- Hagshaw Energy Cluster

Locations + issues

Winchburgh (September 2023)

- ✓ Placemaking / plan-led development
- ✓ Housing delivery
- ✓ Finance and funding
- ✓ Strategic transport connections
- ✓ Education
- ✓ Community facilities / local living
- ✓ Blue and green infrastructure
- ✓ Community involvement (new and existing coming together)

Locations + issues

Winchburgh (September 2023)

- ✓ Placemaking / plan-led development
- ✓ Housing delivery
- ✓ **Finance and funding – subgroup to review, report in detail and share**
- ✓ Strategic transport connections
- ✓ Education
- ✓ Community facilities / local living
- ✓ Blue and green infrastructure
- ✓ Community involvement (new and existing coming together)

Locations + issues

Town centre (tbc) (February 2024)

- ✓ Place and regeneration
- ✓ Town centre living – community facilities in central urban setting
- ✓ Community engagement – communities of interest
- ✓ Business and institution involvement
- ✓ Mixed use
- ✓ Changing retail provision
- ✓ Making best of existing infrastructure for sustainable development
- ✓ Flood risk and regeneration

Locations + issues

Highland / Inverness area (May 2024 – with overnight)

- ✓ Port of Cromarty – green freeport / Scotwind
- ✓ Rural housing delivery – for key workers, at scale (Tornagrain),
- ✓ Community involvement and benefit from investment
- ✓ Unlocking land for development
- ✓ Rural infrastructure – connectivity and facilities

Locations + issues

Granton (August 2024)

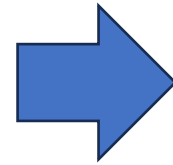
- ✓ Place and regeneration
- ✓ Funding and finance
- ✓ Mixed tenure housing delivery
- ✓ Vacant and derelict land
- ✓ Community wealth building / culture-driven investment
- ✓ Blue and green infrastructure
- ✓ Heat networks
- ✓ Schools and health provision
- ✓ Community development
- ✓ Transport solutions

Potential outputs

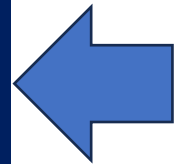
- Place based scenarios
- Overview of the issues arising
- Deep dive into selected topics / issues for sub group / members of reference group to take forward and report back to core group
- Short, sharp, good practice guidance
- Models / demonstrators for scaling up
- Suggested ways of working / partnerships
- Governance options
- 'Unlocking' recommendations addressing key barriers
- Advice on bringing forward investment ready propositions
- Delivery vehicle options
- Technical practice notes to tackle specific challenges
- Protocols / memorandums of understanding
- Mapping / signposting of information on available funding / finance options
- Agreed methodologies for technical work on infrastructure e.g. calculating education requirements
- Recommendations for local development planning
- Recommendations for infrastructure investment prioritisation
- Recommendations for infrastructure levy

CORE GROUP

- Site visit
- Reflection / discussion of site visit
- Agreement of key issue(s) to focus on / explore further



- Hear back from sub group (s)
- Agree next steps for Secretariat to follow up
- Feed findings into wider reporting



SUBGROUPS

- Explore issues further
- Draw in input from reference group
- Write up key findings / recommendations