

# Notice of Meeting and Agenda



## Midlothian Council

**Venue:** Council Chambers/Hybrid,  
Midlothian House, Dalkeith, EH22 1DN

**Date:** Tuesday, 26 March 2024

**Time:** 11:00

**Executive Director : Place**

**Contact:**

Clerk Name: Democratic Services

Clerk Telephone:

Clerk Email: [democratic.services@midlothian.gov.uk](mailto:democratic.services@midlothian.gov.uk)

**Further Information:**

This is a meeting which is open to members of the public.

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## **1 Welcome, Introductions and Apologies**

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## **2 Order of Business**

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Including notice of new business submitted as urgent for consideration at the end of the meeting.

## **3 Declaration of Interest**

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Members should declare any financial and non-financial interests they have in the items of business for consideration, identifying the relevant agenda item and the nature of their interest.

## **4 Deputations**

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No items for discussion

## **5 Minutes**

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<b>5.1</b>	Minute of Midlothian Council of 27 February 2024, submitted for approval	5 - 20
<b>5.2</b>	Minute Volume Index	21 - 22
<b>5.3</b>	Action Log	23 - 26

## **6 Questions to the Council Leader**

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No items for discussion

## **7 Motions**

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<b>7.1</b>	Month of the Military Child	27 - 28
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## **8 Public Reports**

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<b>8.1</b>	Intake Figures and Limits for Primary and Secondary Schools Session 2024/25, report by Executive Director Children, Young People and Partnerships	29 - 56
<b>8.2</b>	Large Grants 2025/28, report by Executive Director Place	57 - 74
<b>8.3</b>	Midlothian Council Housing Allocation Policy Review 2023/24, report by Executive Director Place	75 - 98
<b>8.4</b>	Midlothian Council Mixed Tenure Strategy, report by Executive Director Place	99 - 136

<b>8.5</b>	Midlothian Local Transport Strategy (LTS) – ‘Case for Change’ consultation, report by Executive Director Place	137 - 278
<b>8.6</b>	Pavement Parking, report by Executive Director Place	279 - 286
<b>8.7</b>	Covert Surveillance Annual Report, report by Executive Director Place	287 - 290
<b>8.8</b>	Pre-Election Publicity Guidance, report by Chief Executive	291 - 318

## **9 Private Reports**

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Exclusion of Members of the Public

(A) TO CONSIDER RESOLVING TO DEAL WITH THE UNDERNOTED BUSINESS IN PRIVATE IN TERMS OF PARAGRAPHS 6, 9 AND 11 OF PART 1 OF SCHEDULE 7A TO THE LOCAL GOVERNMENT (SCOTLAND) ACT 1973 - THE RELEVANT REPORTS ARE THEREFORE NOT FOR PUBLICATION;  
AND

(B) TO NOTE THAT NOTWITHSTANDING ANY SUCH RESOLUTION, INFORMATION MAY STILL REQUIRE TO BE RELEASED UNDER THE FREEDOM OF INFORMATION (SCOTLAND) ACT 2002 OR THE ENVIRONMENTAL INFORMATION REGULATIONS 2004.

<b>9.1</b>	Review of Cost Implications of Passivhaus versus Standard High Efficiency Social Housing, report by Executive Director Place
<b>9.2</b>	Ukraine Longer Term Resettlement Programme, report by Executive Director Place

## **10 Date of Next Meeting**

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The next meeting will be held on Tuesday, 7 May 2024 at 11am





# Minute of Meeting

Midlothian Council  
Tuesday, 26 March 2024  
Item No 5.1



## Midlothian Council

Date	Time	Venue
Tuesday 27 February 2024	11:00 am	Council Chambers, Midlothian House/Hybrid

### Present:

Provost McCall (Chair)	Depute Provost Bowen
Councillor Parry (Council Leader)	Councillor Cassidy (Depute Council Leader)
Councillor Alexander	Councillor Curran
Councillor Drummond	Councillor Imrie
Councillor McEwan	Councillor McKenzie
Councillor McManus	Councillor Milligan
Councillor Pottinger	Councillor Russell
Councillor Scott	Councillor Winchester
Councillor Virgo	

### Religious Representatives:

Anne-Theresa Lawrie	
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### In attendance:

Dr Grace Vickers, Chief Executive	Kevin Anderson, Executive Director Place
Morag Barrow, Director of Health & Social Care: Midlothian HSCP / Chief Officer to Midlothian IJB	Fiona Robertson, Executive Director Children, Young People & Partnerships
Alan Turpie, Legal and Governance Manager / Monitoring Officer	David Gladwin, Chief Financial Officer (Section 95 Officer)
Derek Oliver, Chief Officer Place	Saty Kaur, Chief Officer Corporate Solutions
Joan Tranent, Chief Officer, Children's Services / Chief Social Work Officer	Hannah Forbes, Assistant Democratic Services Officer

Janet Ritchie, Democratic Services Officer	Lucy Roddie, Democratic Services Officer
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## 1. Welcome and Apology for Absence

The Provost welcomed everyone to this meeting of the Midlothian Council and advised that the meeting was open to the public and would be webcast live.

## 2. Order of Business

The Democratic Services Officer advised that the minute of the Community Asset Transfer Committee meeting of Tuesday 30 January 2024 had been withdrawn and would be re-presented at the meeting of Midlothian Council on Tuesday 26 March 2024.

The order of business was otherwise as per the agenda previously circulated.

## 3. Declarations of interest

No declarations of interest were intimated at this stage of the proceedings.

## 4. Deputations

None received.

## 5. Minutes of Previous Meetings

Item No.	Report Title	Submitted by:
5.1	Minute of Meeting of Midlothian Council 19 December 2023	Executive Director Place
<b>Outline and Summary of Discussion</b>		
The Minute of Meeting and Private Addendum of Midlothian Council held on 19 December 2023 was submitted and approved as a correct record.		
Councillor Parry moved. Councillor McManus seconded.		
<b>Decision</b>		
Minute of Meeting and Private Addendum of Midlothian Council held on 19 December 2023 was approved.		
<b>Action</b>		
Democratic Services		

Item No.	Report Title	Submitted by:
5.2	Minute Volume Index	Executive Director Place
<b>Outline and Summary of Discussion</b>		

The following minutes were previously circulated to Elected Members and subsequently noted and/or the recommendations contained therein approved:

- Minute of Audit Committee of 30 October 2023
- Minute of Special Audit Committee of 5 December 2023
- Minute of Local Review Body of 13 November 2023
- Minute of Local Review Body of 11 December 2023
- Minute of Performance Review and Scrutiny Committee of 7 November 2023
- Minute of Police Fire and Rescue Board of 15 November 2023
- Minute of MIJB of 24 August 2023
- Minute of Special MIJB of 21 September 2023
- Minute of MIJB of 21 December 2023
- Minute of MIJB – Audit and Risk of 7 September 2023
- Minute of MIJB – Audit and Risk of 23 November 2023

Moved by Councillor Parry. Seconded by Councillor Cassidy.

#### Decision

Minute Volume Index noted.

#### Action

Democratic Services

Item No.	Report Title	Submitted by:
5.3	Action Log	Executive Director Place
<b>Outline and Summary of Discussion</b>		
It was requested that Action 1 – Capital Plan Prioritisation, remain open.		
<b>Decision</b>		
The Action Log was noted, with all actions recommended for closure to be closed except Action 1 which remains open.		
<b>Action</b>		
Democratic Services		

## 6. Questions to the Leader of the Council

None received.

## 7. Motions

Item No.	Notice of Motion	Submitted by:
7.1	Flood Risk Management	Councillor Imrie and Councillor Milligan
<b>Outline and Summary of Discussion</b>		
<p>The Notice of Motion was proposed by Councillor Imrie and seconded by Councillor Milligan.</p> <p>Councillor Imrie and Councillor Milligan in support of the Motion highlighted climate change, extreme weather events and the devastation flooding can cause around Scotland and all over the world and the importance of an update on the flood risk management and therefore proposed as a matter of priority the actions as detailed in the Motion.</p> <p>The Motion was welcomed by Councillors. The Executive Director Place in responding advised that there is a flood risk plan and as part of the continuing review agreed with the motion being presented to Officers.</p>		
<b>Decision</b>		
The Notice of Motion was moved.		
<b>Action</b>		
Executive Director Place		

## 8. Reports

Report No.	Report Title	Submitted by:
8.1	Financial Monitoring 2023/24 – General Fund Revenue	Chief Financial Officer and Section 95 Officer
<b>Outline and Summary of Discussion</b>		
<p>The purpose of this report was to provide Council with information on projections of performance against service revenue budgets in 2023/24 and to provide commentary on areas of material variance against budget. The budget performance figures as shown in Appendix B result in a projected net underspend of £0.128 million which is an improvement of £1.396 million from projections at quarter 2. The projected underspend represents 0.04% of the revised budget.</p> <p>The Chief Financial Officer in presenting the report highlighted the main sections contained within the report and outlined the recommendations as detailed.</p> <p>The Council Leader thanked the Chief Financial Officer and council officers who have worked hard to improve the financial position and commented positively on the ability to track the progress and pace of previously agreed recovery actions and the delivery of transformation projects and agreed with the recommendation to increase the funding for the Midlothian Integration Joint Board.</p> <p>During discussion issues were raised with regards to the overspends and Scotland Excel not having accurate figures with regards to energy, and it was confirmed by</p>		

the Chief Financial Officer that there were issues with Scotland Excel and if agreeable he would bring back with further information. Also highlighted by Members were the issues with pupil transport and timescales, overspends and slippage on last year budget and their concerns regarding Hillend.

The Executive Director Children, Young People & Partnerships provided an update on the work being undertaken with regards to pupil transport and advised that they will have a list of recommendations for consideration within 6 – 8 weeks.

Moved by Councillor Parry, seconded by Councillor Milligan.

#### Decision

Council:

- a) Approved increased funding of £0.794 million for the Midlothian Integration Joint Board in 23/24 to cover unbudgeted pay costs (section 4.2);
- b) Noted projections of revenue costs and income in 2023/24 against budget;
- c) Noted the projected General Fund Reserve Balance at 31<sup>st</sup> March 2024;
- d) Noted recovery actions agreed by the Corporate Management Team in response to areas of projected overspend (section 3.3); and
- e) Noted the contents of this report.

#### Action

Chief Financial Officer/Section 95 Officer

Councillor Curran declared an interest in the above item regarding pupil transport and his personal interest and therefore left the meeting at 11:25 am and returned at 11.30 am.

Report No.	Report Title	Submitted by:
8.2	Housing Revenue Account – Revenue Budget 2023/24	Chief Financial Officer & Section 95 Officer
<b>Outline and Summary of Discussion</b>		
<p>The purpose of this report was to provide Council with:</p> <ul style="list-style-type: none"> <li>• A summary of expenditure and income to the end of quarter 3 in 2023/24 for the Capital Plan and a projected outturn for both the Revenue Account and Capital Plan for 2023/24;</li> <li>• An update on the Capital Plan and Revenue budget 2024/25 - 2026/27.</li> </ul> <p>The Chief Financial Officer in presenting the report highlighted the main sections contained within the report and outlined the recommendations as detailed.</p> <p>There followed a brief discussion in which Members commented positively on the report.</p> <p>Moved by Councillor McKenzie, seconded by Councillor Cassidy.</p>		
<b>Decision</b>		

Council:

- Approved the Housing Revenue Account (HRA) Capital Plan for 2024/25 - 2026/27 as detailed in Appendix D;
- Approved the HRA Revenue Budget for 2024/25;
- Noted the indicative HRA Revenue Budget for 2025/26 and 2026/27 as detailed in Appendix E; and otherwise
- Noted the remaining contents of this report.

**Action**

Chief Financial Officer & Section 95 Officer

Report No.	Report Title	Submitted by:
8.3	General Services Capital Plan 2023/24 Quarter 3 Monitoring and 2024/25 to 2027/28 Budgets	Chief Financial Officer & Section 95 Officer

**Outline and Summary of Discussion**

The purpose of this report was to provide Council with:

- An update of the GSCP incorporating information on further additions to the Capital Plan for approval (Section 3).
- Information on the projected performance against budget for 2023/24 (Section 4).
- Forecast expenditure and income for the GSCP for 2024/25 through to 2027/28 (Section 5)
- Update on the Capital Fund (Section 6).

The Chief Financial Officer in presenting the report highlighted the main sections contained within the report and outlined the recommendations as detailed.

Members raised concerns on the Capital Plan prioritisation, particularly regarding the removal of schools and removal of school refurbishment/extensions and if there would be a full catchment review. The Chief Financial Officer explained that removal was relating to the context of the present Capital Plan and not any future projects and apologised that this wording was confusing. With regards to the full catchment review the Executive Director, Children, Young People & Partnerships confirmed that they are at present working on the current Local Development Plan and that a review across Midlothian may be required when they explore the next Development Plan.

During further discussion clarification was sought on improvements to existing schools to ensure they have the facilities they require, and the Executive Director Place confirmed that this would be elaborated further in the private paper.

Members highlighted their concerns and confusion regarding the information contained in this paper and the private paper and having to note something in this paper but deciding in the private paper. The Executive Director Place explained that the private paper is a wider scope in terms of some of the governance process and

the Legal and Governance Manager / Monitoring Officer confirmed that with regards to Para 9 of Schedule 7A of the Local Government Scotland Act 1973 covers the terms that are proposed in the private paper and discussion on the figures presented in the later report require it to be considered in private.

Moved by Councillor Parry, seconded by Councillor Scott

#### Decision

Council:

- Noted the inclusion of the projects listed in Section 3.1 in the General Services Capital Plan (GSCP).
- Approved the adjustment to the project expenditure and funding budgets for the projects as outlined in Section 3.2.
- Approved the addition of the new projects to the GSCP, as outlined in Section 3.3.
- Noted the changes to the GSCP in respect of the Learning Estate Strategy as outlined in Section 3.4 and as per the Capital Plan Prioritisation report.
- Noted the forecast outturn for 2023/24 for expenditure, funding and borrowing as outlined in Section 4.
- Noted the planned expenditure and funding levels in the GSCP for 2023/24 to 2027/28 (as outlined in Section 5 and shown in Appendices B and C), prior to reaching a financially sustainable outcome from the Capital Plan Prioritisation exercise.

#### Action

Chief Financial Officer & Section 95 Officer

Report No.	Report Title	Submitted by:
8.4	Treasury Management and Investment Strategy 2024/25 & Prudential Indicators	Chief Financial Officer & Section 95 Officer
Outline and Summary of Discussion		
<p>The purpose of this report to Council is to provide an update on the implementation of the Council's TMIS 2023/24, and to make recommendations to facilitate consideration of the 2024/25 Strategy, the Prudential and Treasury indicators contained therein, and the approach to the statutory repayment of loans fund advances.</p> <p>In accordance with the Treasury Management Code of Practice, the annual Treasury Management &amp; Investment Strategy (TMIS) &amp; Prudential Indicators report is required to be adequately scrutinised before being recommended to the Council. For Midlothian, this role is undertaken by the Audit Committee, with this report being approved as presented to Audit Committee on 29 January 2024.</p> <p>Councillor Parry moved the report. It was also requested that a review of the policy is undertaken in 6 months to 1 year to mitigate any unforeseen circumstances.</p>		

The Chief Financial Officer in presenting the report highlighted the main sections contained within the report and outlined the recommendations as detailed.

Councillor Parry and Councillor Milligan commented positively on the Treasury Management Report and expressed their congratulations and thanks to the Chief Financial Officer and the Finance Team.

Moved by Councillor Parry, seconded by Councillor Milligan

#### Decision

Council:

- Approved the restriction of the Authorised Limit to the value of the Capital Financing Requirement at 31 March 2025 (£534.105 million), pending finalisation of the General Services Capital Plan Prioritisation;
- Note that there are no other material changes proposed to the Treasury Management and Investment Strategy (TMIS) for 2024/25 from the strategy currently in place, other than to update the Prudential Indicators (Section 5 and Appendix C), to reflect the revised capital plans.
- Note the retention of the current approach for the repayment of loans fund advances as outlined in Section 6 and that any changes arising from the Scottish Government's consultation on the Amendment to the Local Authority (Capital Finance and Accounting) (Scotland) Regulations 2016 will be reflected in a revised TMIS if required; and
- Accordingly approve the Treasury Management and Investment Strategy for 2024/25.

#### Action

Chief Financial Officer & Section 95 Officer

Report No.	Report Title	Submitted by:
8.5	Foster Carer Additional Funding	CSWO and Chief Officer, Children's Services
Outline and Summary of Discussion		
<p>This report advises of additional financial requests that have been requested by foster carers:</p> <ul style="list-style-type: none"><li>• A 5.5% increase in fostering fees for 2024/25</li><li>• All foster carers move from Level 1 fees to Level 2 fees following a one-year probationary period.</li><li>• The two items mentioned below are for noting only as they shall be incorporated within base budget and have been accepted and approved.<ul style="list-style-type: none"><li>- An increase in mileage payments from 45p per mile to 61p per mile.</li><li>- Reinstate birthday and Christmas allowance for each child and an agreed amount to go towards holiday activities.</li></ul></li></ul>		



The Chief Officer Children's Services / Chief Social Work Officer in presenting the report outlined the main sections of the report and highlighted the importance of Foster Carers and highlighted that there is still a lack of foster carers and this will contribute to the recruitment of foster carers.

Members commented positively on the report and commented on the importance of foster carers and also kinship carers and their critical role. The Chief Officer Children's Services / Chief Social Work Officer advised that the rate of allowance in this report was for foster carers and kinship carers across all of Scotland. However this report was relating to additional fees and only foster carers receive fees and advised that they would need to look at how they could recompense kinship carers if this is a request from members, as they are not entitled to a fee, and further discussion was required offline to see how this could be managed.

The request for the financial impact to be included in the executive summary was noted.

Councillor Parry commented as being a care experience person was delighted at the comments from her colleagues on the importance of this paper.

Moved by Councillor Scott, seconded by Councillor Milligan.

#### Decision

Council approved additional funding for foster carers as highlighted within the report.

#### Action

Chief Officer Children's Services / Chief Social Work Officer

Report No.	Report Title	Submitted by:
8.6	A Council Tax charges on second homes and empty properties	Chief Officer Corporate Solutions
<b>Outline and Summary of Discussion</b>		
<p>The purpose of this report was to provide Council with information on the recent legislative change on Council Tax charges for second and empty homes and present a recommended policy for approval.</p> <p>The Chief Officer Corporate Solutions in presenting this paper highlighted the main sections contained within the paper and the recommendations as detailed.</p> <p>Members commented positively on this report and the policy change was welcomed. It was also noted that council tax fee was for services and that empty houses do not use council services.</p> <p>Moved by Councillor McKenzie, seconded by Councillor Curran.</p>		
<b>Decision</b>		
Council:		

<ul style="list-style-type: none"> <li>• Agreed to apply a 100% increase in respect of Council Tax charges for second homes as proposed in 3.8.</li> <li>• Agreed that no discount be applied for empty properties as referred to in 3.12 and 3.13.</li> <li>• Agreed to extend the initial six-month grace period on empty homes referred to in 3.12 for up to a maximum of an additional six months, therefore in total up to 12 months grace period can be applied as proposed in 3.13.</li> <li>• Delegated authority to the Executive Director Place to apply the discretionary six-month extension to the grace period on empty properties referred to in 3.12, on a case-by-case basis following recommendation from the Chief Officer Corporate Solutions as proposed in 3.13.</li> </ul>
<b>Action</b>
Chief Officer Corporate Solutions

Report No.	Report Title	Submitted by:
8.7	Fees and Charges 2024/25	Chief Officer Corporate Solutions
<b>Outline and Summary of Discussion</b>		
<p>The purpose of this report was to provide Council with the proposed fees and charges table for 2024/25 for consideration and approval.</p> <p>The Chief Officer Corporate Solutions in presenting this paper highlighted the main sections contained within the paper and the recommendations as detailed.</p> <p>Members commented on the work put into this report and appendices and that there was a good balance in what was changing and what wasn't changing. Also highlighted was the condition of St Andrew's car park and that this required resurfacing.</p> <p>The Chief Officer Corporate Solutions in responding to a question regarding charges for events and the concerns for Gala Days advised that the charges were for marques, generators and PAs and was a minimum increase of 10% and this was detailed in the appendix to the report. With regards to the increase in bulky uplifts and fly-tipping the Chief Officer advised that benchmarking was done with other local authorities and private organisations to ensure they were providing a service that covers the Council's cost but still cheaper than some areas and advised on the monitoring of fly-tipping.</p> <p>Moved by Councillor Parry, seconded by Councillor Virgo.</p>		
<b>Decision</b>		
<p>Council:</p> <ul style="list-style-type: none"> <li>• Agreed to the officer recommendations for new, revised and frozen charges as outlined within the report; and</li> </ul>		

- Noted the final agreed fees and charges register will be published on the Council's website.

#### Action

Chief Officer Corporate Solutions

Report No.	Report Title	Submitted by:
8.8	Medium Term Financial Strategy – 2024/25 to 2028/29	Chief Financial Officer & Section 95 Officer

#### Outline and Summary of Discussion

The main purpose of this report was to provide Council with the budget position for 2024/25 to allow discharge of their statutory duties to set a balanced budget for 2024/25. The report also provides budget projections for financial years 2025/26 through to 2028/29.

Commentary is provided to Members on the latest position on Scottish Government funding for Midlothian Council in 2024/25 and government timescales to finalise this.

The Chief Financial Officer in presenting the report highlighted the main sections contained within the report and outlined the recommendations as detailed.

The Council Leader expressed her thanks to the Chief Financial Officer and the finance team and all officers involved in the work not just in the run up to the budget but the continual work they do to ensure Midlothian residents get the best possible service and thanked the Elected Members who contribute a great deal of hard work for Midlothian residents. The Council Leader commented positively on all the work done to present a balanced budget and some of the positive aspects of the report and highlighted some of the challenges that the Council will face and moved the report with the Amendment.

Councillor Cassidy in seconding the report also commented positively on this report.

Members also commented further on some of the positive aspects for this year but also highlighted the challenges the council still face to balance the budget in years to come. Comments were made on the good transformational work done by all Elected Members together to put the people of Midlothian first no matter what political party and congratulations were expressed further to the Finance Team and Officers. It was noted that while we have the reprieve this year the Council needs to bring in more money and receive additional funding to reflect the huge growth Midlothian is seeing and the challenges with the Council Tax freeze this year.

Councillor Milligan highlighted an amendment which was circulated to Group Leaders prior to the meeting and on a request from the Legal and Governance Manager/Monitoring Officer for purpose of transparency and openness for the constituents of Midlothian, Councillor Milligan read out the Amendment.

Moved by Councillor Parry, seconded by Councillor Cassidy with the Amendment presented by Councillor Milligan. (attached to the minute)

**Decision****Council:**

- a) Noted that the financial outlook remains challenging for this term of Council and recall the recommendation in the External Auditors report in 2022 that *“as a matter of urgency, officers and elected members need to work together to develop and agree the medium-term financial strategy and progress the Council’s transformation plans”*.
- b) Noted the position relating to Scottish Government funding for Councils in 2024/25 and the associated grant settlement for Midlothian Council.
- c) Noted that the projected budget gap over the life of the Medium-Term Financial Strategy (MTFS) through to 2028/29, as shown in an amended table 6 (as attached), is £2.562 million.
- d) Approved a freeze in Council Tax rates for 2024/25 thus accepting the Scottish Government Grant offer of £2.870 million to support a freeze. Council Tax bandings are shown at Appendix B.
- e) Approved the 2024/25 budget as shown in the amended table 6 and an amended Appendix D (attached), noting that it contains a £2.680 million utilisation of reserves and one-off funding of £4.093 relating to retrospective service concessions. It is also recommended that the Council receive additional funding as expected from UK Government consequential flowing from the budget on 5 March, that funding will be fully applied to reduce the £2.680 million utilisation of Reserves.
- f) In the context of severe financial pressures in the Midlothian Integration Joint Board (MIJB), an additional £2.680 million of recurring funding to that outlined in table 8 in section 3.46 is provided in 2024/25 as detailed below thus approving an allocation to MIJB of £63.546 million.
  - £0.500 million to support costs of children and young people with complex care needs transitioning to Adult Services;
  - £1.000 million to offset costs associated with an increasing number of older people; and
  - £1.180 million to cover contractual and other inflation costs.
- g) Noted that a further MTFS report with updated financial projections and a specific focus on progress with Transformation Blueprint work will be presented to Council no later than 25<sup>th</sup> June 2024.
- h) Noted that ongoing work on Capital Plan Prioritisation, including the updating of asset management plans, will be finalised and presented to Council no later than 25<sup>th</sup> June 2024.
- i) Otherwise, noted the remainder of the report.

**Action****Chief Financial Officer****Item No.****Report Title****Submitted by:**

8.9	Bus Partnership Fund Grants Awarded, Fund freeze and Community Bus Fund Award	Executive Director Place
<b>Outline and Summary of Discussion</b>		
<p>The Executive Director Place introduced the report.</p> <p>It is recommended that Council:</p> <ul style="list-style-type: none"> <li>a) Agree to accept the award of £178,336.80 from the Bus Partnership Fund (BPF) for the purchase of 24 upgraded Real Time Passenger Information screens, in 2023/24. as part of a SEStran region-wide upgrade project.</li> <li>b) Note the announcement of a freeze to the BPF in 2024/25,</li> <li>c) Note the completion of the BPF funded Orbital routes study, appended to this report.</li> <li>d) Note work by officers to explore other funding opportunities to support delivery the appraised measures from the Orbital study.</li> <li>e) Note the need to form a strategic view of the sustainability of bus services in Midlothian and officers will scope out the work required.</li> <li>f) Approve acceptance of £101,000 Transport Scotland's Community Bus Fund grant award and allocates the £101,000 grant award to purchase 13 real-time passenger information screens as part of a SEStran region-wide upgrade project.</li> </ul> <p>Councillor Cassidy, seconded by Councillor Alexander, moved the paper, with addition of a recommendation that the dividend received from Lothian Buses be reinvested back into Midlothian transport resources.</p> <p>It was noted that there is a lack of new or enhanced services supplying Midlothian, in addition to service reductions. This will have an adverse effect on the environment, in the context of rapid population growth. Councillor Imrie moved an amendment to the motion, namely, that the Council Leader to write to the cabinet secretary for transport to articulate the effects of a freeze to the BPF on Midlothian. Councillor Cassidy and Councillor Alexander accepted Councillor Imrie's amendment and as such it became part of the substantive motion.</p> <p>The Strategic Transport Planning Manager, in responding to a comment regarding the sustainability of bus services, reported that new powers are available under the Transport Scotland Act 2019, which allows Local Authorities to investigate incorporating local bus suppliers. It was noted that many residents of Midlothian contribute to the City of Edinburgh's economy and should therefore be supported with reliable and affordable bus services. The significant overspend on school transport was noted and it was suggested that transport supply needs to be considered holistically. se of dividend to address issue. It was suggested that developers should contribute to the bus development fund.</p>		
<b>Decision</b>		
<p>Council:</p> <ul style="list-style-type: none"> <li>a) Agreed to accept the award of £178,336.80 from the Bus Partnership Fund (BPF) for the purchase of 24 upgraded Real Time Passenger Information screens, in 2023/24. as part of a SEStran region-wide upgrade project.</li> <li>b) Noted the announcement of a freeze to the BPF in 2024/25,</li> </ul>		

- c) Noted the completion of the BPF funded Orbital routes study, appended to this report.
- d) Noted work by officers to explore other funding opportunities to support delivery the appraised measures from the Orbital study.
- e) Noted the need to form a strategic view of the sustainability of bus services in Midlothian and officers will scope out the work required.
- f) Approved acceptance of £101,000 Transport Scotland's Community Bus Fund grant award and allocates the £101,000 grant award to purchase 13 real-time passenger information screens as part of a SEStran region-wide upgrade project.
- g) Agreed that the dividend received from Lothian Buses be reinvested back into Midlothian transport resources.
- h) Instructed the Council Leader to write to the cabinet secretary for transport to articulate the effects of a freeze to the BPF on Midlothian.

#### Action

Executive Director Place

Item No.	Report Title	Submitted by:
8.10	'Midlothian on the Move' Draft Strategy for Consultation and new bids to the Active Travel Infrastructure Fund	Executive Director Place

#### Outline and Summary of Discussion

The Executive Director Place introduced the report.

It is recommended that Council:

- a) Agrees to public consultation on the draft 'Midlothian on the Move' Strategy (Active Travel Strategy - ATS) 2024-34, commencing in March 2024.
- b) Agrees to receive a further report in summer 2024 presenting the Council with the final ATS for adoption.
- c) Agrees to extend the validity of the previous ATS to 2024 providing coverage for ongoing projects, until the new ATS is adopted,
- d) Notes that due to short timescales, four bids totalling £899,000 were submitted on 2 February 2024 to the Active Travel Infrastructure Fund (ATIF) for 100% of the costs of school route improvements on Morris Street, Nivens Knowe/A701, Carllops Road and Sherwood Crescent.
- e) Agree the proposals for the four projects as set out in paragraph 3.19.
- f) Agrees expenditure of up to £899,000 in the General Services Capital Plan, subject to successful ATIF grant award(s) by Transport Scotland, to be fully phased in 2024/25.

Councillor Alexander, Seconded by Councillor Cassidy, moved the paper.

#### Decision

Council:

- a) Agreed to public consultation on the draft 'Midlothian on the Move' Strategy (Active Travel Strategy - ATS) 2024-34, commencing in March 2024.
- b) Agreed to receive a further report in summer 2024 presenting the Council with the final ATS for adoption.

<ul style="list-style-type: none"> <li>c) Agreed to extend the validity of the previous ATS to 2024 providing coverage for ongoing projects, until the new ATS is adopted,</li> <li>d) Noted that due to short timescales, four bids totalling £899,000 were submitted on 2 February 2024 to the Active Travel Infrastructure Fund (ATIF) for 100% of the costs of school route improvements on Morris Street, Nivens Knowe/A701, Carlops Road and Sherwood Crescent.</li> <li>e) Agreed the proposals for the four projects as set out in paragraph 3.19.</li> <li>f) Agreed expenditure of up to £899,000 in the General Services Capital Plan, subject to successful ATIF grant award(s) by Transport Scotland, to be fully phased in 2024/25.</li> </ul>
<b>Action</b>
Executive Director Place

Report No.	Report Title	Submitted by:
8.11	200th Anniversary of Braille	Executive Director Place
<b>Outline and Summary of Discussion</b>		
<p>The Chief Officer Corporate Solutions introduced the report.</p> <p>Council is asked to:</p> <ul style="list-style-type: none"> <li>a) Note the 200th anniversary of Louis Braille; and</li> <li>b) Endorse the officer recommended actions to recognise the 200<sup>th</sup> anniversary.</li> </ul> <p>Councillor McManus, seconded by Councillor Scott, moved the paper. Elected Members commended the Chief Officer Corporate Solutions for recognising the importance of Braille.</p>		
<b>Decision</b>		
<p>Council:</p> <ul style="list-style-type: none"> <li>a) Noted the 200th anniversary of Louis Braille; and</li> <li>b) Endorsed the officer recommended actions to recognise the 200<sup>th</sup> anniversary.</li> </ul>		
<b>Action</b>		
Chief Officer Corporate Solutions		

**The Public section of the meeting concluded at 13:46pm.**

## **9. Private**

### **Exclusion of Members of the Public**

**In view of the nature of the business to be transacted, the Committee agreed that the public be excluded from the meeting during discussion of the undernoted item, as contained in the Addendum hereto, as there might be disclosed exempt information as defined in paragraphs 3, 6 and 14 of Part I of Schedule 7A to the Local Government (Scotland) Act 1973:-**



- 9.1** A701 Relief Road and A702 Spur Road – Phasing, report by Executive Director Place
- 9.2** Midlothian House Building Fabric Upgrades, report by Executive Director Place
- 9.3** Capital Plan Prioritisation and Strategic Investment Framework, report by Executive Director Place

#### **Date of Next Meeting**

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The next meeting will be held on Tuesday 26 March 2024 at 11.00am.

The meeting concluded at 14.16pm.



# Midlothian Council Minute Volume



**Presented to the Meeting  
of Midlothian Council  
on Tuesday, 26 March 2024**

## **1 Minutes of Meetings submitted for Approval**

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Minute of Community Asset Transfer Committee of 30 January 2024	3 - 8
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## **2 Minutes of Meetings submitted for Consideration**

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Minute for Consideration

Minute of Appeal Hearing of 6 September 2023	9 - 10
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Minute of Cabinet of 28 November 2023	11 - 18
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Minute of Planning Committee of 28 November 2023	19 - 28
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Minute of Planning Committee of 23 January 2024	29 - 36
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## **3 Minutes of Meetings submitted for Information**

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Minute for Information

Minute of MIJB - Audit and Risk Committee of 7 December 2023	37 - 44
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Seminars

Note of Seminar of 23 January 2024

# Midlothian Council Action Log

Midlothian Council  
Tuesday, 26 March 2024  
Item No. 5.3



No	Date of meeting	Item No and Title	Action	Action Owner	Expected completion date	Comments
1	21/02/2023	Capital Plan Prioritisation	Refer approved Council report to BTSG on additional affordability scope and projects.	Executive Director Place	August 2023	<p><b>Recommended for closure:</b> Updates regularly provided to BTSG. A series of thematic BTSG sessions have been delivered over Oct/Nov 2023 and a report scheduled for December 2023 Council.</p> <p>Report re- presented to February 2024 Council.</p> <p>Report to be re-presented to May 2024 Council.</p>

No	Date of meeting	Item No and Title	Action	Action Owner	Expected completion date	Comments
2	19/12/2023	8.4 Non-Domestic Rates Relief Policy	Review of policy to be undertaken in 6 months – 1 year.	Chief Officer Corporate Solutions	No later than April 2025	
3	19/12/2023	8.6 Annual Road Works Performance Report 2022/23	Consider identifying marks for potholes as part of the continuous improvement of road services.	Chief Officer Place	April 2024	<p>Presently assessing a method to apply identifying marks to potholes which can indicate to road users that the Council is aware of them, as they are scheduled for repair.</p> <p>We aim to avoid methods causing a different issue as we are aware in some local authorities their identifying method creates a road safety hazard as road users take avoidance action</p>
4	19/12/2023	8.8 Fleet and Plant Asset Replacement Plan	Considerations around increasing fleet capacity to be brought to BTSG.	Chief Officer Place	June 2024	

No	Date of meeting	Item No and Title	Action	Action Owner	Expected completion date	Comments
5	27/02/2024	8.9 Bus Partnership Fund Grants Awarded, Fund freeze and Community Bus Fund Award	Write to the cabinet secretary for transport to articulate the effects of a freeze to the BPF on Midlothian	Council Leader	Prior to March Council	<b>Recommended for closure:</b> letter issued 29 February 2024



**Midlothian Council Meeting.**

**Tuesday 26 March 2024**

**Month of the Military Child Motion**

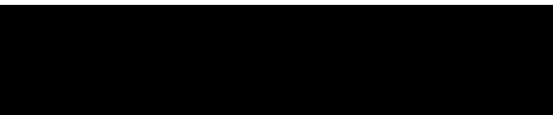
That Midlothian Council recognises that April is the month of the military child.

Often, the experiences that children with a parent who has served or is serving in the British Forces aren't uppermost in people's minds. It's probably the group that is thought of least, but who is most affected.

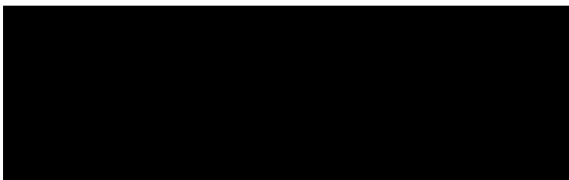
A best friend can change every move, the address, a school, GP, hospital and the best parks to play in or hang out in.

In Midlothian we have Glencorse Barracks where 2 Scots are currently based and therefore should have more knowledge that most the problems that are faced by the children. There are children from both serving or veterans in every school in Midlothian.

April is a month to celebrate those children. The Daffodil is the flower of the military child and purple is the colour. Please wear something purple on Friday April 26<sup>th</sup> to celebrate.



Proposed by: Cllr Winchester



Seconded by: Cllr Virgo





## **Intake Figures and Limits for Primary and Secondary Schools Session 2024/25**

### **Report by Executive Director Children, Young People and Partnerships**

#### **Report for Approval**

#### **1 Recommendations**

Council is requested to approve:

- The requirement to apply intake limits, as detailed in the report, at a number of schools in order to safeguard places for pupils to be able to attend their catchment school.

Council is otherwise requested to note:

- The estimated intake figures for primary and secondary schools in Section 3, tables 1 – 3.

#### **2 Purpose of Report/Executive Summary**

This report provides Council with an update on the enrolment of pupils and intake for the school session 2024/25. The report identifies a number of schools where there is pressure on school capacity, and the need for intake limits to safeguard places for catchment children and to manage placing requests.

**Date: 12 March 2024**

#### **Report Contact:**

Fiona Robertson, Executive Director (Children, Young People and Partnerships)

[Fiona.Robertson@midlothian.gov.uk](mailto:Fiona.Robertson@midlothian.gov.uk)

### 3 Intake August 2024

- 3.1 The Education (Scotland) Act 1980 (as amended by section 33 of the Education (Scotland) Act 1996) allows education authorities to reserve places for incoming pupils into catchment areas of schools. This assists education authorities in managing their schools and prevent them being at capacity at commencement of an academic year, and furthermore enabling them to accommodate incoming catchment pupils at their catchment schools when they move into the area during the academic year.
- 3.2 Section 28A (3A) of the Education (Scotland) Act 1980 (as amended) provides a general principle that, so far as is compatible with the provision of suitable instruction and training and the avoidance of unreasonable public expenditure, pupils are to be educated in accordance with the wishes of their parents. Acceptance of a placing request for a child who is resident outwith the catchment area of a specified school could prevent the education authority from retaining reserved places at a specified school or in relation to any particular stage of education at the school. It is for this reason that the education authority may refuse to grant a placing request that would impact on the ability to reserve places in schools. Reserved places are not allocated to children making placing requests. The places are reserved for children who may move in to the catchment area during the academic year.
- 3.3 The progress of house building in parts of Midlothian is continuing to generate growth in pupil numbers. This combined with parental placing requests for certain schools with limited capacity means that pupil intake limits are required in order to safeguard places for pupils to be able to attend their catchment school.
- 3.4 The provision of schools and their capacity, alongside pupil projections, are set out in the Learning Estate Strategy. The Learning Estate Strategy Update report was presented to Council 13 December 2022 with subsequent reports including the Capital Plan Prioritisation and Strategic Investment Framework report to Council 27 February 2024.
- 3.5 The Council's approach to pupil placement is to provide a place for every pupil at one of their catchment schools and to grant placing requests for siblings whenever this is possible. Where catchment schools are over-subscribed the pupil placement process reserves places at neighbouring schools to ensure every pupil is afforded the opportunity to attend a local school. Maintaining this commitment is continuing to be challenging with the growth in pupil numbers and the consequent pressure on school capacities.

- 3.6 The following factors are considered for both primary and secondary schools when determining the appropriate number of reserved places that are likely to be required for pupils moving into the catchment area of the school during 2024/25:
- The proposed level of capping at the school and number of expected pupils
  - Current and planned housing developments
  - Projected school rolls
  - Projected migration into the catchment area
  - Information about reserved places from previous years
  - School capacities
  - Information, for example, families indicating a move into the area before/after commencement of the academic year
  - Future expansion of the Learning Estate
- 3.7 Pupil enrolment for the 2024/25 school session is well underway. 1,376 primary pupils and 1,216 secondary pupils have been registered to date for the August 2024 intake. This includes 206 requests to defer entry to primary school. The legislative deadline for the submission of placing requests is 15 March, and decisions on those requests will be made and communicated by letter to parents/carers during April. To date, 336 placing requests have been received, which is broadly in line with the requests made last year (333). However, there has been a 20% increase in Primary requests and a 20% decrease in Secondary requests. The Education Appeal Committee will meet in May and June to consider any appeals received in respect of placing requests which have been refused.
- 3.8 With effect from August 2023 the legislation around deferring entry to Primary 1 changed, so that all children who turn 5 after their school start date and defer are entitled to a further funded year of ELC. The 233 deferrals received last year represented a significant increase from the 167 received for August 2022 (+40%). This increased the number of children at early learning and childcare settings and reduced the number of children commencing Primary 1 in August 2023. At the time of writing, 206 deferrals have been received for August 2024 and it is likely that more will be received before the school term commences. It remains to be seen whether the higher level of deferrals will continue in future years, or if it is as a result of the impact of the Covid-19 lockdown restrictions. If the latter, when the deferral numbers return to pre-pandemic levels the Primary 1 intake will be higher and increase pressure on capacity while the numbers feed through.

## Primary Schools

3.9 For August 2024, the primary schools where the number of Primary 1 pupils residing in their catchment exceeds Primary 1 intake capacity and may be oversubscribed are:

- |                          |                                  |
|--------------------------|----------------------------------|
| • Bilston Primary School | • Rosewell PS                    |
| • Burnbrae PS            | • Roslin PS                      |
| • Gore Glen PS           | • Stobhill PS                    |
| • Gorebridge PS          | • Woodburn PS                    |
| • Hawthornden PS         | • Sacred Heart Roman Catholic PS |
| • King's Park PS         | • St Andrew's RC PS              |
| • Mauricewood PS         | • St David's RC PS               |
| • Mayfield PS            | • St Mary's RC PS                |
| • Paradykes PS           |                                  |

3.10 The catchment numbers used to create the above lists of non-denominational schools includes all children living in each catchment area. Until parents and carers register their child for Primary 1 it is not known how many are Roman Catholic and may choose to go to their catchment Roman Catholic school. In theory, therefore, all catchment children could choose to attend their catchment non-denominational school. The Roman Catholic schools on the list are those where more children have registered for Primary 1 than there is capacity.

3.11 At the time of writing, the deadline for placing requests had not passed. These and deferrals are still being received and the figures in this paper are subject to change. While there may still be some movement, the currently oversubscribed schools, after taking account of known deferrals, are:

- Bilston
- Paradykes
- Roslin
- Sacred Heart RC
- St Andrew's RC
- St David's RC
- St Mary's RC
- There is also limited available capacity at King's Park and Rosewell.

The currently oversubscribed schools listed above do not take into consideration the migration of pupils via placing requests as the placing request window had not closed at the time of writing. Intake limits should, therefore, be imposed in all our schools to ensure sufficient capacity for all Midlothian children.

3.12 The following tables set out the catchment numbers and intake projections.

**Table 1: Primary 1 non-denominational schools' catchment numbers, estimated intake numbers, intake limits and reserved places August 2024**

Non-Denominational Primary Schools	Catchment P1s	P1s registered net of deferrals	Estimated P1 intake August 2024	P1 intake limit August 2024
Bilston Primary School	63	46	43	45*
Bonnyrigg Primary School	56	53	53	63
Burnbrae Primary School	74	57	53	72
Cornbank St James Primary School	38	29	37	47
Cuiken Primary School	45	25	29	60
Danderhall Primary School	87	78	79	90
Easthouses Primary School	50	36	23	63
Gore Glen Primary School	66	37	47	60
Gorebridge Primary School	61	48	39	60
Hawthornden Primary School	67	37	38	54
King's Park Primary School	82	72	75	78
Lasswade Primary School	55	43	55	60
Lawfield Primary School	55	37	38	60
Loanhead Primary School	9	6	15	30
Mauricewood Primary School	65	44	52	54
Mayfield Primary School	51	35	39	50
Moorfoot Primary School	12	10	14	14
Newtongrange Primary School	51	44	51	56
Paradykes Primary School	70	61	59	60
Rosewell Primary School	38	30	32	33
Roslin Primary School	60	49	45	45**
Stobhill Primary School	34	26	31	33
Strathesk Primary School	51	36	28	54
Tynewater Primary School	18	18	24	33
Woodburn Primary School	133	94	103	110
	<b>1,391</b>	<b>1,051</b>	<b>1,102</b>	<b>1,384</b>

*Note: The catchment figures include children who subsequently register for their catchment denominational school.*

*\*This is a one-year increase in intake beyond the normal intake limit of 33. To achieve this, we have created an additional class in what should be a general-purpose space. However, this level of intake can only be accommodated for one year.*

*\*\*To ensure that we have sufficient capacity for catchment P1 pupils in Roslin, we have reverted one of the early years spaces to be a classroom. Consequently, the capacity for the early years will be reduced.*

**Table 2: Primary 1 denominational schools' catchment numbers, estimated intake numbers, intake limits and reserved places August 2024**

Denominational Primary Schools	P1s registered net of deferrals etc	Estimated P1 intake August 2024	P1 intake limit August 2024
Sacred Heart RC Primary School	27	25	25
St Andrew's RC Primary School	27	18	25
St David's RC Primary School	36	25	25
St Luke's RC Primary School	24	20	25
St Mary's RC Primary School	32	25	25
St Matthew's RC Primary School	1	2	10
	<b>147</b>	<b>115</b>	<b>135</b>

- 3.13 When considering how to cap school rolls, Midlothian Council, as an education authority, must look at all schools and available resources. The total population of children who require places in schools is considered and, at a local level, how many are within each catchment area. Each school will manage its resources and this is balanced with other schools' situations to ensure that resources are equitably shared throughout Midlothian, thereby avoiding unreasonable public expenditure.
- 3.14 The intake at denominational schools will be managed with the application of pupil intake limits and by giving first priority to those who are baptised Roman Catholic. Intake limits will be set in the context of the number of applications from pupils who are baptised Roman Catholic, the availability of suitably qualified teachers and the capacity of all schools serving each catchment area. It is not anticipated that the number of qualifying pupils wishing to attend the denominational schools will exceed their intake capacities.

## Secondary Schools

- 3.15 This year there are four secondary schools where the number of Secondary 1 pupils residing in their catchment exceeds Secondary 1 intake capacity: Dalkeith; Lasswade; Newbattle; St David's Roman Catholic High School.
- 3.16 Since August 2017, the Council has provided home to school transport for pupils residing in the Loanhead area who choose to attend Beeslack High School rather than Lasswade, which is their catchment secondary school, in order to ease the pressure of pupil numbers at Lasswade. The number of pupils taking up this option has been declining, with approximately 21% of pupils resident in Loanhead opting to attend Beeslack next year.

The table below shows the estimated Secondary 1 intake for August 2024.

**Table 3: Secondary 1 catchment numbers, estimated intake numbers, intake limits and reserved places August 2024**

School Name	Catchment S1	Estimated S1	S1 intake limit
Beeslack High School	122	142	150
Dalkeith High School	227	213	220*
Lasswade High School	307	312	320*
Newbattle High School	278	263	270*
Penicuik High School	125	129	140
St David's RC High School	152	147	150
<b>Total</b>	<b>1,211</b>	<b>1,206</b>	<b>1,250</b>

*\*The intake limits for Dalkeith, Lasswade and Newbattle have been increased beyond their sustainable limits. We will continue to monitor the intake and reduce the intake limit where possible.*

- 3.17 Rolls at Dalkeith HS, Lasswade HS and St David's HS need to be capped to ensure capacity is not exceeded and places can be reserved. Pupil enrolment for these high schools will be managed by use of intake limits, proactive management of placing requests and early engagement with parents and schools on the optimal placement of Secondary 1 pupils for August 2024. The intake limits may need to be reduced in future years.

### **Pupil Placement Guidelines**

- 3.18 The policy guidelines on Admission to Primary and Secondary Schools are included in Appendix 3.

### **Summary**

- 3.19 As in previous years, pupil intake for August 2024 will be assessed regularly, ensuring effective management of the pupil placement process by taking account of placing requests and reserving places in neighbouring schools to provide places for pupils whose catchment school is over-subscribed. Intake limits based on schools' capacity will be applied as necessary in order to prevent schools from exceeding their capacity.
- 3.20 The letters confirming Primary 1 school places and the outcome of secondary placing requests will be issued to parents/carers during April.

## 4 Report Implications

### 4.1 Resource

The Devolved School Management scheme sets out how resources are allocated to schools with reference to roll and need. There are no direct resource implications arising as a result of this report.

### 4.2 Risk

The recent, ongoing, and planned house building in Midlothian is resulting in increased pupil numbers. There is a significant risk that the council will not have a place for every pupil at their catchment school and the Learning Estate Strategy considers this from a strategic perspective. A primary area of concern is Shawfair given the restricted capacity at Dalkeith HS. In the short term this is mitigated by the application of limits on pupil intake, reviews of placing requests, and, in the case of denominational schools, by giving first priority to those who are baptised Roman Catholic.

### 4.3 Single Midlothian Plan and Business Transformation

Themes addressed in this report:

- ☐ Community safety
- ☐ Adult health, care and housing
- ☒ Getting it right for every Midlothian child
- ☐ Improving opportunities in Midlothian
- ☒ Sustainable growth
- ☐ Business transformation and Best Value
- ☐ None of the above

### 4.4 Key Priorities within the Single Midlothian Plan

Key outcome: Individuals and communities have improved health and learning outcomes

GIRFEC outcomes: Children and young people are supported to be healthy, happy and reach their potential; Inequalities in learning outcomes are reduced.

### 4.5 Impact on Performance and Outcomes

The aim of this paper supports the priority to reduce the inequalities in learning outcomes by improving the quality of learning and teaching, leading to raised levels of achievement and attainment, by providing every child with the opportunity to attend school in their local community.

### 4.6 Adopting a Preventative Approach

The Council's approach to pupil placement adopts a preventative approach by maximising the opportunities for pupils to attend school in their local community.

### 4.7 Involving Communities and Other Stakeholders



This report informs Council of the potential impact on communities arising from pressure on school places.

#### **4.8 Ensuring Equalities**

This paper informs Council of the impact of managing pupil admissions in line with national and local policy and procedure.

#### **4.9 Supporting Sustainable Development**

The sustainability issues relating to this report relate to the sufficiency of schools places particularly in areas of housing development, the provision of additional capacity is being taken forward via the Learning Estate Strategy coupled with the School Catchment Review Programme.

#### **4.10 IT Issues**

There are no IT issues arising directly as a result of this report. The IT requirements arising in order to put in place the additional capacity for each school will be identified as part of the development of the project specifications. The budget required to fully equip any additional classes required for August 2024 will be developed in liaison with Digital Services.

### **Appendices**

Appendix 1 Primary School Pupil Census 2023

Appendix 2 Secondary School Pupil Census 2023

Appendix 3 Policy Guidelines - Admission to Primary and Secondary Schools

## Appendix 1

## Primary Schools Pupil Census 2023

School	P1	P2	P3	P4	P5	P6	P7	Roll	% of Capacity
Bilston Primary School	31	29	37	28	28	23	28	204	84%
Bonnyrigg Primary School	58	60	60	59	65	55	65	422	92%
Burnbrae Primary School	65	55	63	71	75	76	78	483	90%
Cornbank St James Primary School	32	53	42	51	44	37	44	303	89%
Cuiken Primary School	24	23	28	27	41	33	32	208	45%
Danderhall Primary School	58	65	64	56	42	50	53	388	65%
Gore Glen Primary School	53	45	60	51	48	38	37	332	76%
Gorebridge Primary School	27	57	38	35	54	34	40	285	62%
Hawthornden Primary School	23	41	40	32	32	45	52	265	61%**
King's Park Primary School	59	72	80	76	71	68	62	488	96%*
Lasswade Primary School	33	56	49	39	51	48	58	334	85%
Lawfield Primary School	32	49	44	50	28	44	60	307	67%
Loanhead Primary School	27	25	21	29	31	25	20	178	82%
Mauricewood Primary School	46	56	49	52	49	45	49	346	88%
Mayfield Primary School	36	30	40	33	33	39	37	248	63%
Moorfoot Primary School	11	10	14	13	13	10	7	78	87%
Newtongrange Primary School	53	49	55	55	53	56	48	369	94%
Paradykes Primary School	54	57	49	55	46	39	37	337	86%
Rosewell Primary School	23	26	29	32	20	21	16	167	95%*
Roslin Primary School	47	37	45	46	29	44	31	279	104%*
Sacred Heart Primary School	24	17	9	20	20	14	23	127	73%
St Andrew's Primary School	18	24	15	21	21	21	24	144	82%
St David's Primary School	25	27	29	29	32	25	30	197	91%
St Luke's Primary School	23	20	28	30	31	27	33	192	79%
St Mary's Primary School	25	24	27	25	23	31	21	176	73%
St Matthew's Primary School	10	4	9	5	9	6	11	54	72%
Stobhill Primary School	31	29	22	31	30	31	28	202	83%
Strathesk Primary School	25	25	30	27	37	36	47	227	58%
Tynewater Primary School	20	17	21	28	39	21	27	173	71%
Woodburn Primary School	89	83	101	101	97	92	84	647	88%*
<b>Primary Schools</b>	<b>1082</b>	<b>1165</b>	<b>1198</b>	<b>1207</b>	<b>1192</b>	<b>1134</b>	<b>1182</b>	<b>8160</b>	

Note: these figures are draft. Capacity is current published figures.

\*The capacity does not include the modular units which have been added.

\*\*The capacity has reduced as classrooms have been converted to non-mainstream use.

## Appendix 2

## Secondary Schools Pupil Census 2023

	S1	S2	S3	S4	S5	S6	Total	% of Capacity
Beeslack Community High School	146	139	145	139	117	65	751	87%
Dalkeith High School	187	190	181	176	136	81	951	91%
Lasswade High School Centre	296	297	300	297	244	173	1607	100%
Newbattle High School	245	254	236	189	166	82	1172	84%
Penicuik High School	133	127	97	126	106	51	640	68%
St David's RC High School	135	148	143	133	125	66	750	84%
<b>Secondary Schools</b>	<b>1142</b>	<b>1155</b>	<b>1102</b>	<b>1060</b>	<b>894</b>	<b>518</b>	<b>5871</b>	

Note: these figures are draft



# **CHILDREN, YOUNG PEOPLE AND PARTNERSHIPS**

## **EDUCATION POLICY**

### **Admission to Primary and Secondary Schools**

This Policy is authorised by  
This Policy supersedes  
This Policy was circulated to  
Date of circulation  
For further Information  
Review Date

Council  
Version 13  
Public

[Pupil.Placement@midlothian.gov.uk](mailto:Pupil.Placement@midlothian.gov.uk)  
2023

## Table of Contents

<b><u>1.0 PLACING IN SCHOOLS</u></b>	<b>15</b>
<u>1.1 Legal background</u>	15
<u>1.2 Denominational Education</u>	15
<u>1.3 Parents wishing a Gaelic Medium Education</u>	15
<u>1.4 Children with Additional Support Needs</u>	16
<u>1.5 Home to School Transport</u>	16
<u>1.6 Composite Classes</u>	16
<u>1.7 Team Teaching</u>	16
<u>1.8 Children living under shared care</u>	16
<u>1.9 Reserved places</u>	17
<b><u>2.0 ARRANGEMENTS FOR PRIMARY SCHOOLS</u></b>	<b>17</b>
<u>2.1 Registration procedures for entry to primary school</u>	17
<u>2.2 Press advertisements</u>	17
<u>2.3 Contact with parents/carers</u>	18
<u>2.4 Eligibility</u>	18
<u>2.5 Choosing a school</u>	18
<u>2.6 Access to information</u>	18
<u>2.7 Registration of catchment children</u>	19
<u>2.8 Enrolment of catchment children</u>	19
<u>2.9 Change of address</u>	20
<u>2.10 Phased entry arrangements</u>	20
<u>2.11 Deferred entry to primary school</u>	20
<u>2.12 Early admission</u>	21
<b><u>3.0 ARRANGEMENTS FOR SECONDARY SCHOOLS</u></b>	<b>21</b>
<u>3.1 Eligibility</u>	21
<u>3.2 Transfer between primary and secondary schools</u>	21
<u>3.3 Primary-secondary liaison</u>	22
<u>3.4 Induction programmes</u>	22
<u>3.5 Registration procedures</u>	22
<u>3.6 Allocation of Catchment Secondary School Places</u>	22
<u>3.7 Intake numbers</u>	23
<u>3.8 Issue of school handbooks</u>	23
<u>3.9 Press advertisement</u>	23
<u>3.10 Making a Placing Request for a Non-Catchment Primary or Secondary School</u>	23

<a href="#"><u>3.11 What will happen when a placing request is made to Midlothian Council?</u></a>	24
<a href="#"><u>3.12 Restriction or limitation of places</u></a>	25
<a href="#"><u>3.13 Other relevant factors that may be taken into account</u></a>	25
<a href="#"><u>3.14 Refusing a placing request</u></a>	26
<a href="#"><u>3.15 What happens if the Council refuses a request?</u></a>	26
<a href="#"><u>3.16 Primary school placing request</u></a>	27
<a href="#"><u>3.17 Secondary school placing request</u></a>	27
<a href="#"><u>3.18 Placing Requests for Children with Additional Support Needs</u></a>	27
<b><a href="#"><u>Contact Details</u></a></b>	28
<b><a href="#"><u>Useful Websites</u></a></b>	28

## **1.0 PLACING IN SCHOOLS**

### **1.1 Legal background**

The admission of pupils to both primary and secondary schools is defined in terms of the Education (Scotland) Act 1980. Key points to note are:

- Parents/carers have the right to request admission to the school of their choice;
- Such a request must be in writing and is known as a placing request;
- The Council has a duty to accede to this request, except in certain circumstances specified in the Act;
- The Council has a duty to inform parents/carers of their right to make a placing request and to provide certain prescribed information in order to assist parents/carers in making their choice of school.

Catchment areas have been designated for all Midlothian primary and secondary schools. Every residential address has a catchment denominational school and a catchment non-denominational school for both primary and secondary education. The parents/carers of all children known to the Council to be due to enrol for the first time in a primary school or transfer from a primary to a secondary school shall be given information about their catchment school options and notified of their right to request an alternative school.

For all other stages, the onus is on the parent to make enquiries regarding alternative school placement for their child(ren). A parent may submit a placing request for her/his child in a school at any stage.

### **1.2 Denominational Education**

In Midlothian all denominational schools are Roman Catholic.

A child does not need to be Catholic to enrol in one of our Roman Catholic primary schools or secondary school, but a place is not guaranteed for those not baptised Roman Catholic. Where a Roman Catholic school is oversubscribed priority is given to catchment Roman Catholic children who are baptised, and where parents have provided the baptismal certificate. We do not create additional classes for other children if all baptised Roman Catholic children can be placed.

### **1.3 Parents wishing a Gaelic Medium Education**

Gaelic medium education for Midlothian resident pupils is currently provided by the City of Edinburgh Council. Midlothian Council will provide home to school transport for pupils enrolled in Gaelic medium education. Currently, parents wishing to have their child/ren educated in the Gaelic medium should make a placing request for the Gaelic medium primary school, Bun-sgoil Taobh na Pàirce or the Gaelic Medium Unit at James Gillespie High School in Edinburgh. To apply for a place in either school parents should complete a placing request form available on the City of Edinburgh Council website. Further information can be found at: <https://www.edinburgh.gov.uk/school-places/gaelic-schools-1/1>

Parents can request that the Council carries out an assessment for the need for Gaelic medium primary education to be provided within the Council area. Further information and an assessment request form are available from the following website: [www.gov.scot/Publications/2017/02/1442/downloads](http://www.gov.scot/Publications/2017/02/1442/downloads)

#### **1.4 Children with Additional Support Needs**

In line with legislation we have a policy of including children with additional support needs in mainstream schools where possible. Some children may be educated in specialist schools/classes.

Further information about additional support needs is available from the Additional Support for Learning Officer, whose contact details are given at the end of this document.

#### **1.5 Home to School Transport**

A pupil may receive free transport if they attend their catchment school and their home address is more than two miles from the school based on the shortest recommended walking route. A pupil may also receive free transport if the Council has placed them in a non-catchment school due to a catchment school being full. From August 2017 pupils resident in Loanhead who make a successful placing request for S1 at Beeslack High School will also be eligible for free transport.

A pupil will not receive free transport if they attend a non-catchment school as a result of a placing request being granted.

#### **1.6 Composite Classes**

Composite classes are part of the normal organisation in many primary schools and can have a maximum of 25 pupils. Age is the main criterion for selecting pupils for composite classes. Normally composite classes will have a minimum of four pupils from each year stage.

Please refer to Professional Practice Paper 7 for further guidance.

#### **1.7 Team Teaching**

Team teaching is where two teachers teach a class that has more than the maximum number of pupils per teacher for that particular stage.

The maximum size of a P1 class size is 25, a P2 or P3 class is 30 and a P4, P5, P6 and P7 class is 33 pupils.

#### **1.8 Children living under shared care**

Where parents are separated the address of the parent with whom the child resides for the majority of their time per week and is in receipt of child benefit for the child, is used to determine the catchment area. If the shared care arrangement is a 50/50 split between the parents, the parents will be asked to provide proof such as a legal agreement. If the Council



is satisfied that the care is equally shared, the parents will be given the opportunity to choose which of the catchment schools at which to register.

### **1.9 Reserved places**

The Education (Scotland) Act 1996, as amended by the Standards in Scotland's Schools etc. Act 2000, gives Education Authorities the power to reserve places at schools for children who move into the catchment areas after enrolment has completed.

With the level of house building and migration into the authority, Midlothian Council continues to experience pressure on schools rolls. After the allocation of places, in accordance with Section 2.8 and 3.6, places will be reserved for children moving into catchment.

In the Primary 1 year group, one place per class (and one place per teacher, where team teaching is in place) is reserved for incoming catchment children for the entire school year.

In the Secondary 1 year group, one place per 40 pupils is reserved for incoming catchment children for the entire school year.

Where there are other considerations, such as house building in certain catchment areas, the number of reserved places may be increased beyond the above ratios.

For Roman Catholic schools, reserved places will only be granted to catchment baptised Roman Catholic children.

If out of catchment places are granted by an Appeal Committee or a Sheriff, this may result in fewer reserved places being available.

## **2.0 ARRANGEMENTS FOR PRIMARY SCHOOLS**

### **2.1 Registration procedures for entry to primary school**

Registration procedures commence at the beginning of November each year.

If an applicant's catchment primary school is subject to a consultation review they should continue to register their child at that catchment school. As part of the consultation process Pupil Placement will keep applicants informed of the implications for their child and the options available. Further information on school consultations can be found at [midlothian.gov.uk/consultations](http://midlothian.gov.uk/consultations).

### **2.2 Press advertisements**

In October each year Pupil Placement will place an advertisement in the local press, advising parents/carers of any child eligible to begin primary education that they should, by a specified date, register their child at their catchment school. Registering a child does not

automatically ensure that a place will be made available; this will be determined when all information is collated and examined.

Parents/carers will be advised that, even if they wish to make a placing request for a non-catchment school, they must first register their child at the catchment school.

### **2.3 Contact with parents/carers**

At the same time, Pupil Placement will contact by letter the parents/carers of all children eligible to begin primary education and who receive funded early learning and childcare in Midlothian. Head Teachers should ensure that copies of the school handbook are available for any parent requesting one.

### **2.4 Eligibility**

Any child whose fifth birthday falls between 1 March in any year and the last day of the following February can start primary school on the first day of the autumn term, (known as the commencement date).

An exception to these procedures may be where children who have been admitted to primary education by another authority subsequently become resident in Midlothian. In such cases, the Head Teacher should consult their appropriate Schools Group Manager before deciding whether to admit the child.

### **2.5 Choosing a school**

Pupil Placement will issue information informing parents/carers of their rights to choose a school when they write to the parents/carers of eligible children. Any parent/carer wishing to make a placing request should obtain a Placing Request application form. It is not essential that parents/carers use the form but they must make the request in writing to the Pupil Placement Section within Children, Young People and Partnerships. It is essential, however, that parents/carers initially register their child at their catchment school.

See the later section for information on placing requests.

### **2.6 Access to information**

Parents/carers should have access to information about the schools in which they are interested. This will generally be contained in the school prospectus or handbook, copies of which should be available from the school and on the school website. In addition, the Council produces guidelines on admission to Midlothian schools called Placing in Schools, which is available on our website at [midlothian.gov.uk/placingbooklet](http://midlothian.gov.uk/placingbooklet).

## 2.7 Registration of catchment children

Primary Head Teachers may wish to publicise registration arrangements through their own local channels if they feel this is appropriate so that as many parents/carers as possible are encouraged to register their children at this time. During the registration period Head Teachers should only register those children who are normally resident in the catchment area.

Head Teachers should ensure that catchment children are correctly identified; a Council Tax bill, Child Benefit letter, recent utility bill or driving licence is normally adequate proof. If the pupil does not attend a Midlothian Council early learning and childcare setting or receive funded ELC from a partnership provider, their birth certificate or passport should be seen as well. It is the address of the parent or carer which is relevant; the address of other family members or a child minder with whom the child may occasionally reside is not relevant.

Registration and placing request forms and the facility to upload evidence:  
[midlothian.gov.uk/schoolplace](https://midlothian.gov.uk/schoolplace).

Please note that registration does not guarantee a place at a catchment school.

See the earlier section for children living under shared care.

## 2.8 Enrolment of catchment children

The Pupil Placement Team will collate the registration information obtained from each school and use this to determine whether there is sufficient capacity to accommodate all catchment children. Where there is insufficient capacity, priority will be given in the following order:

- children who have been prioritised based on exceptional circumstances;
- children who are baptised Roman Catholic (Roman Catholic schools);
- children who will have siblings attending the school at the same time;
- then all remaining catchment children.

If there are more children than places available in any category, proximity of home to school and/or ease of travel will normally be used. A sibling attending the nursery class at the same time will not be taken into account.

Parents/carers will be advised by letter, sent by the Pupil Placement Team by 30 April, whether they have been granted a place at their catchment school. Those children who have been granted a place will be automatically enrolled at the school.

Once the place is offered it will not be withdrawn unless the place was obtained using false information or the family change address before the start of the school year.

Those who have not been granted a place at their catchment school will have a place allocated at the Midlothian school nearest to their home with places available. They will be given the option to make a placing request to another school, if they so wish. The pupil will

be placed on a waiting list for the catchment school in order of priority and, should a place become available, parents/carers will be contacted by Pupil Placement.

## **2.9 Change of address**

Children who move, or are moving before the start of the school year, will have a place reserved in their non-denominational or denominational catchment school based on their address at the start of the school year. This is subject to places being available and where proof of change of address has been received by **15 March**. For families who are renting, acceptable proof of change of address is a signed tenancy agreement. For families who are purchasing, a letter from a solicitor confirming missives have been concluded is not sufficient to enrol a child. The Council will ask for further proof by way of a council tax statement, utility bill e.g. gas, electric, landline telephone bill, HMRC child benefit letter or driving licence to accompany the concluded missives letter following the move. Discretion can be used if the parent/carer is due to move a week prior to the new term commencing.

## **2.10 Phased entry arrangements**

Head Teachers may wish to phase the primary 1 intake over a period. If this is done, all children eligible for admission should be admitted by the second week of the new school session. However, a parent may require the authority to accept a child from the commencement date.

Head Teachers may also choose to limit primary 1 pupils to part day attendance in the early stages but such arrangements should not extend beyond the second week of the new school session. Any request from a parent for a child to be in full time attendance should normally be granted. Certain children may require special consideration to be in full time attendance, for example due to medical or family circumstances. In such cases, Head Teachers should consult their appropriate Schools Group Manager regarding arrangements for these children.

## **2.11 Deferred entry to primary school**

Children in Scotland usually start school between the ages of 4 years 6 months and 5 years 6 months old. Children who turn 5 between the start of the school year and the end of February can apply to defer starting primary 1 for a year.

From August 2023, all families who are granted a deferral will be able to access a further year of funded quality Early Learning and Childcare (ELC).

Please refer to the deferral policy for more information about the process.

[Deferred entry to primary school | Midlothian Council](#)

Please note that all children must register at their catchment school for P1 even if an application for deferred entry is being made.

## **2.12 Early admission**

Parents/carers may make a request for early admission to primary school. The Council does not have a duty to educate a child who is not of school age and it is the professional view of the authority is that early learning and childcare is the most appropriate form of education for children.

The Council has delegated the responsibility of granting early admission to the Executive Director, Children, Young People and Partnerships, but this will only be considered if it can be established that refusal would harm a child's education in the long term.

When applying for early admission, parents/carers should provide evidence to support their case, including written evidence wherever possible. Members of staff should not provide letters of support to parents/carers.

There is no right of appeal once a decision has been reached on requests for early admission as the child is not of school age.

## **3.0 ARRANGEMENTS FOR SECONDARY SCHOOLS**

### **3.1 Eligibility**

Pupils will normally transfer to secondary school at the end of a seven year course of primary education. If, in the opinion of the Head Teacher or other professional advice, there are exceptional circumstances which would make it inadvisable to transfer a child, the appropriate Schools Group Manager should be consulted before a final decision is made.

Pupils attending a non-denominational primary school will be allocated a place at their catchment non-denominational secondary school. Pupils attending a denominational primary school will be allocated a place at St David's Roman Catholic High School. If the parents/carers wish to request their other catchment secondary school they should complete a placing request form and return it to the Pupil Placement section.

### **3.2 Transfer between primary and secondary schools**

Pupil Placement will provide Head Teachers with details of which school each child will be transferring from/to.

Head Teachers of primary schools should ensure that detailed information on each pupil is forwarded to the appropriate secondary school. This information will normally include:

- an assessment of the pupil's attainment in mathematics and language;
- comments on ability and attainment in other curricular areas, e.g. science, art, music;
- comments on special interests and aptitudes;
- an indication of the pupil's personal attributes and information about their background which may influence their attitude and performance in school work;
- the Pupil Progress Records (PPR), updated to the end of the last session of primary education;

- the Pupil Profile, which is completed by the pupil.

### **3.3 Primary-secondary liaison**

Secondary schools will normally have an established liaison programme with their associated primary schools which will include other initiatives to ease the transition between primary and secondary stages.

### **3.4 Induction programmes**

Primary schools and their associated and neighbouring secondary schools have established procedures to ensure a smooth transition for all children. This includes transfer of information about each child's progress.

Secondary Head Teachers should also arrange for parents/carers and incoming pupils to visit their school at an appropriate time, prior to transfer. Full information on the school should be sent at the start of the summer term to all parents/carers of pupils transferring to the school.

### **3.5 Registration procedures**

All parents/carers of P7 pupil's resident in Midlothian, who attend a primary school in Midlothian, will receive written confirmation from Pupil Placement in November that their child has been registered for a place at their catchment secondary school, based on their home address. Places at secondary schools may be limited, so registration does not guarantee a place. Parents/carers will also be advised of their right to make a placing request.

See later section for information on placing requests.

Midlothian pupils are enrolled in their catchment secondary schools through the transfer of their details from their associated primary schools. Secondary schools need to enrol those pupils whose placing requests have been granted and who do not attend a Midlothian primary school.

### **3.6 Allocation of Catchment Secondary School Places**

The Council will normally give the highest priority to children living in the catchment area of a school. In the event of a school having more catchment children than places available, priority will be given in the following order:

- children who have been prioritised based on exceptional circumstances;
- children who are baptised Roman Catholic (Roman Catholic schools only);
- children who will have siblings attending the school at the same time;
- children who attend an associated primary school;
- then all remaining catchment children.

If there are more children than places available in any category, proximity of home to school and/or ease of travel will normally be used.

If a place at a catchment school is not available, parents/carers will be offered a place at the nearest Midlothian secondary school to their home address with places available. They will be given the option to make a placing request to another school, if they so wish. The pupil will be placed on a waiting list for the catchment school in order of priority and, should a place become available, parents/carers will be contacted by Pupil Placement. Where there are more pupils in one category, the priority will be based on distance.

Once the place is offered it will not be withdrawn unless the place was obtained using false information or the family change address before the start of the school year. Children who are offered a place at their preferred catchment school will be enrolled automatically.

### **3.7 Intake numbers**

Pupil Placement will inform secondary school Head Teachers of the number of catchment pupils that will be transferred from primary schools and any intake limits that may apply. They will also be informed on a regular basis of numbers of any non-catchment requests which have been received and catchment requests out to other schools.

Throughout this period, secondary school Head Teachers should discuss with the Pupil Placement Section any factors that may affect the school's ability to accommodate the projected S1 intake.

### **3.8 Issue of school handbooks**

Head Teachers must ensure school handbooks are updated by November. Delays in updating the handbook should be avoided as parents/carers are legally entitled to this information. The handbook should be made available on the school website.

### **3.9 Press advertisement**

In October each year Pupil Placement will place an advertisement in the local press, advising parents/carers of any Midlothian child eligible to begin secondary education that their child will be automatically enrolled in their catchment secondary school, unless a placing request is made for another school.

### **3.10 Making a Placing Request for a Non-Catchment Primary or Secondary School**

All parents/carers have the right to request a place for their child in a non-catchment school; this is called a placing request. It is the Council's statutory duty to grant placing requests where there are places available, except in certain circumstances which are set out in The Education (Scotland) Act 1980.

If the child is starting P1 or S1 in August and the parent/carer wants them to attend a non-catchment school, they may make a request by completing a Placing Request. The placing request form is available online at [midlothian.gov.uk/placing](http://midlothian.gov.uk/placing), alternatively a paper version of the form is available on Midlothian Council's website or can be obtained from Pupil Placement at [pupil.placement@midlothian.gov.uk](mailto:pupil.placement@midlothian.gov.uk).



If the child is at any other stage of their education parents/carers should contact the Head Teacher of the school of their choice.

If the child has additional support needs the right to make a non-catchment placing request includes the right to request a special school or special class. Parents/carers who wish to make this kind of placing request should discuss their choice of school with the child's lead professional before making their request.

### **3.11 What will happen when a placing request is made to Midlothian Council?**

The following information applies if a placing request is made for a child to a Midlothian Council school.

The Midlothian closing date for placing requests to start P1 or S1 in August is in the preceding December. The Council will advise parents and carers of the closing date in the letters sent out. The Council will still consider a request if it arrives after this date but by 15 March, the national cut-off date.

The parent/carer should receive acknowledgement of their application within fourteen days of receipt by Pupil Placement. The Council will notify parents/carers of the outcome of all placing request received by 15 March by the end of April.

Placing requests received after 15 March will be decided within two months of receipt and parents/carers notified. However, exceptional circumstances can only be considered when a placing request is received by 15 March, it will not be considered with a late placing request. In most cases, where we receive a late placing request, your child will be placed on a waiting list below the requests received on time. It is, therefore, important that placing requests are submitted by 15 March providing all relevant information and supporting documents. Assistance in completing a placing request is available through the [pupil placement team](#).

The Placing Request forms for P2 to P7 and S2 to S6 are available to download on Midlothian Council's website or from the schools. These placing requests will be acknowledged within fourteen days of receipt and a decision made within two months.

Members of staff should not provide letters of support to parents/carers.



### 3.12 Restriction or limitation of places

The Council will give the highest priority to children living in the catchment area of a school. Places remaining after catchment children are enrolled will be available for non-catchment children.

#### Placing Requests

Non-catchment placing requests will be granted if there are places available after all catchment children are accommodated and reserved places retained within the agreed intake limit.

Additional classes will not be created for non-catchment children.

#### Priority for places

Priority will be given to applicants in the following order (catchment and non-catchment):

- children who have been prioritised based on exceptional circumstances;
- children who are resident in the school's catchment area and are baptised Roman Catholic (Roman Catholic schools only);
- children who are resident in Midlothian and are baptised Roman Catholic (Roman Catholic schools only);
- children who are resident in the school's catchment area who will have siblings attending the school at the same time. A sibling attending the nursery class will not be taken into account;
- children who are resident in the school's catchment area;
- children who are resident in Midlothian who will have siblings attending the school at the same time. A sibling attending the nursery class will not be taken into account;
- children who are resident in Midlothian;
- children who are resident outside Midlothian and are baptised Roman Catholic (Roman Catholic schools only);
- children who are resident outside Midlothian who will have siblings attending the school at the same time. A sibling attending the nursery class will not be taken into account;
- then all other applicants.

### 3.13 Other relevant factors that may be taken into account

Attendance at an associated primary school (for requests in S1) may be taken into account however it does **not** guarantee that a request will receive priority or agreement.

Children have additional support needs if they require something which is extra or different to what is normally provided for other children of the same age. Staff in all schools in Midlothian are skilled in meeting the needs of pupils and all can fully support pupils with a range of additional support needs or those who are experiencing bullying. All schools have transition processes in place to support children starting Primary 1 or Secondary 1, including an enhanced transition programmes for children who need a bit more support. When deciding whether to give a child priority on the grounds of exceptional circumstances, the pupil placement team will consider whether the requested school can better meet their needs than their catchment school.

If there is more than one placing request in any of the categories listed above, the shortest, recommended walking distance from each child's home to the nearest school gate is measured. Those living closer to the school are placed above those living further away.

Once a pupil has completed a proper admission to the school they will not be asked to transfer to another school against the wishes of their parents/carers in order to admit a pupil who has moved into the catchment area.

A proper admission is one made under the policy of the Council based on correct information from the parents/carers.

**Please note that, if a placing request is successful, the child's place at their catchment school may be allocated to another child. If a parent/carer then changes their mind and wishes their child to attend their preferred catchment school, a place may not be available.**

### 3.14 Refusing a placing request

If the Council refuses a placing request a letter will be sent to the parent/carer which gives the reasons for the decision. The Education (Scotland) Act 1980 sets out the reasons why a placing request may be refused.

The main reasons are:

- an extra teacher would have to be employed;
- the Council would have to spend a significant amount to extend or alter the accommodation at, or facilities provided in connection with, the school;
- an extra teacher would have to be employed, or additional class formed, at a future stage of the child's education;
- the number of children at the school would exceed the school's capacity.
- to reserve places at the school for children moving into the catchment area;
- the order and discipline in the school would be seriously affected i.e. through overcrowding;
- the educational wellbeing of pupils at the school would be seriously affected i.e. through overcrowding or exceeding the relevant maximum class size;
- the child's education would be affected because the education at the school requested is unsuitable.

### 3.15 What happens if the Council refuses a request?

If a placing request is refused, the parent/carer has the right of appeal. Appeals must be lodged, in writing, no later than 28 days after the refusal letter being sent. Details of how to make an appeal will be in the refusal letter sent to the parent/carer.

In Midlothian appeals are heard by the Education Appeals Committee. The Education Appeals Committee is independent of the Children, Young People and Partnerships

Directorate. This is a formal legal process and further information will be sent on receipt of the appeal.

### **3.16 Primary school placing request**

If a place at the requested primary school is not available, a place will be reserved at the preferred catchment primary school that the child has been registered at. However if no place is available at the preferred catchment school, then a place will be allocated at the nearest school with places available (if the preferred school was a denominational school then a place will be allocated at a denominational school if possible). A waiting list will be formed for the requested school and/or catchment school and, should a place become available, the parent/carer be contacted.

### **3.17 Secondary school placing request**

If a place at the requested secondary school is not available, a place will be reserved at the catchment secondary school. However if no place is available at the catchment secondary school, then a place will be allocated at the nearest school with places available. A waiting list will be formed for the requested school and/or catchment school and, should a place become available, the parent/carer will be contacted.

### **3.18 Placing Requests for Children with Additional Support Needs**

The parents/carers of children recorded as having additional support needs also have the right to make a placing request to a special school or a special class. If the Council refuses the request, parents/carers are given a statement of the reasons for the decision.

Under the terms of the Education (Additional Support for Learning) (Scotland) Act 2009, if parents/carers have been refused a placing request for a child with a coordinated support plan (CSP), to a special school or a special class, a mediation service is available to families of children with additional support needs and they have the right to appeal the decision. Appeals are dealt with by the Additional Support Needs Tribunal for Scotland. Details of who to send your appeal to will be in the refusal letter we send you.

## Contact Details

Pupil Placement  
Midlothian Council  
Children, Young People and Partnerships  
Fairfield House  
8 Lothian Road  
Dalkeith  
EH22 3ZG

Email: [pupil.placement@midlothian.gov.uk](mailto:pupil.placement@midlothian.gov.uk)

Additional Support for Learning Officer  
Midlothian Council  
Children, Young People and Partnerships  
Fairfield House  
8 Lothian Road  
Dalkeith  
EH22 3ZG

Email: [asn.team@midlothian.gov.uk](mailto:asn.team@midlothian.gov.uk)

## Useful Websites

Midlothian Council Website: [www.midlothian.gov.uk](http://www.midlothian.gov.uk)  
Parent Zone Scotland: [education.gov.scot/parentzone/](http://education.gov.scot/parentzone/)  
Education Scotland: [www.education.gov.scot](http://www.education.gov.scot)

## **Large Grants 2025/28**

**Report by Saty Kaur, Chief Officer Corporate Solutions**

### **Report for Decision**

#### **1 Recommendations**

Council is recommended to

- Note the issues highlighted and proposed actions set out at 3.4-3.8
- Note the establishment of a Short Life Working Group to progress options for the grant funding programme
- Approve option 4 within 3.14 as recommended by Business Transformation Steering Group

#### **2 Purpose of Report/Executive Summary**

To provide an update on the current programme and options for the next round of large grants funding 2025/28.

**Date** Wednesday 31 January 2024

**Report Contact:**

Saty Kaur, Chief Officer Corporate Solutions

[Saty.Kaur@midlothian.gov.uk](mailto:Saty.Kaur@midlothian.gov.uk)

### **3 Background**

- 3.1** In preparation for the Council's budget setting 2023/24, a range of savings proposals were presented to elected members through the Business Transformation Steering Group (BTSG) for consideration and referral to Council. These were also subject to community consultation prior to the budget setting Council meeting.
- 3.2** BTSG considered the Council's grant funding programmes – specifically the small grants programme and the large grants programme. BTSG decided not to continue with the annual small grants programme for 2023/24 onwards and the funding was removed to contribute to the Council's recurring savings target.
- 3.3** With regards to the Council's large grants programme, as this is a three-year programme with funding committed for the 2022/25 funding period, no decision was made at that time on the fund for the 2025/28 programme. Officers were remitted to provide further information on the existing grants programme to enable members to determine the future programme. This was aligned to the Transformation Blueprint Theme 1 – Follow the Money.

#### **Main Report - challenges**

- 3.4** As part of the Transformation Blueprint, grant funding is included in Theme 1 as an area of focus. Initial scoping work has identified that the Council does not have a full overview of where money is being awarded via commissioning and grant funding. Some of the challenges around grant funding include:
- the complexity of managing and facilitating external grant funding on behalf of Government(s)
  - the wide range of grants funded through the Council across all three Directorates; and the further lack of knowledge/awareness in the Directorates of what is being funded from different services; and
  - the crossover between grant funding, commissioning and other service provision that may be delivered on behalf of the Council.
- 3.5** It is the assessment of officers that a significant piece of work is required to be undertaken to improve the current position and develop a strategic approach to grant funding for the Council. It is proposed that a short life working group (SLWG) is established to bring together the different services who are currently involved in grant funding and commissioning, and the scope should include all funding streams and not just the large grants which was the initial prompt for the savings proposal.

**3.6** The SLWG will comprise Council officers, representation from the Third Sector Interface and communities, and an independent critical friend. The draft scope of the SLWG includes:

- Comparison of grant delivery models across Scotland
- Options for funding core costs against the current approach of funding projects
- Development of an options appraisal for commissioning vs grants
- Establishment of a full council grants register
- Proposals to attract additional external funding sources for the Council and the third sector.
- Adoption of an agreed data/evidence informed approach to allocating funding.
- Strengthening the third sector joint working/partnership approach to delivering outcomes for communities

**3.7** The SLWG will be chaired by the Chief Officer Corporate Solutions and progress will be regularly reported to the Business Transformation Board and Business Transformation Steering Group. This gives elected members oversight and scrutiny of the work programme as it develops.

**3.8** Following consideration of this report at today's meeting, it is intended that the SLWG meet in April (after the Easter recess) and the full Terms of Reference and membership is agreed.

#### **Current position - Large Grants 2022/25 and 2025/28**

**3.9** For the 2022/25 funding round, applications for over £4.4m (total over 3 years) was received for a funding pot of £1.56m (which equates to £520k/year).

**3.10** The council approved large grant funding for this three-year period which supports 28 community/third sector projects and initiatives aimed at reducing poverty, improving health, learning outcomes, climate change and supporting the most vulnerable members of our communities. This is split across 4 themes:

- Learning Outcomes (total for three years - £437,740) – table 1
- Health Outcomes (total for three years - £713,442) – table 2
- Economic Circumstances (total for three years - £173,484) – table 3
- Carbon Emissions (total for three years - £133,782) – table 4

**3.11** The Year 1 monitoring reports have been received for the projects (activity/outputs up to March 2023). Tables 1-4 below illustrate the awards made and a short summary of outputs from these reports.

**Table 1 – Learning Outcomes**

Organisation	Purpose	Outcomes	Awarded Year 1	Awarded Year 2	Awarded Year 3	Total Awarded (over 3 years)	Outputs/achievements from Year 1 monitoring
Edinburgh Napier University (Progress Through Learning Midlothian)	To continue to deliver and develop the Progress Through Learning Midlothian (PTLM) project; working in partnership to widen participation in further and higher education, improve qualification levels and participation in lifelong learning.	Increase in unrepresented groups applying for FE/HE courses; build confidence and motivate people to pursue pathway into college/university; 2 locally delivered adult learning courses with credits towards entry; free and impartial guidance and advice to individuals and groups; partnerships with CP groups strengthened; deliver Careers & advice fayre annually.	£18,018	£18,479	£18,849	£55,346	193 people have used the service. 3 courses run with 22 participants. Partnership winter warmer events with 26 attendees and training delivered by Scottish Refugee Council to develop specialist support and work.
MVA	Community Engagement and Development Officer to deliver a programme of community engagement and capacity building aimed at grassroots community groups, third sector organisations and individual community activists and social entrepreneurs.	Support new/aspiring groups with governance and funding advice; partnership working in Dalkeith/Woodburn to support food pantry development & town centre regeneration; 1:1 capacity building with 30+ organisations and social enterprises; 12+ training workshops offered to 3 <sup>rd</sup> sector; regular bulletins to reach all groups.	£18,141	£18,600	£19,374	£56,115	195 people used service. 3 new groups given governance and funding advice, supported groups with constitutions and other related matters, 13 training events ran with 195 attendees. 85 updates sent out to 600 subscribers.  Main focus on funding events to support groups applying for Investing in Communities and UKSP funding streams. Meet the Councillors event well received, £10,000 of climate funding secured to create Climate Action plans in Damhead and Penicuik.



IntoWork	Continuation and extension of existing specialist supported employment service for disabled people/people with health conditions.	1:1 employability support to 23 people who have a health condition or disability per year; 80% will progress towards or retain employment.	£23,450	£23,450	£23,450	£70,350	37 people engaged with service (24 new). 24 referrals to internal Welfare Rights Service with financial gain of £32,027.08. Wellbeing support offered to 4 clients on 1:1 basis
Gorebridge Community Development Trust	Core funding to allow the Development Trust to continue to lead services and expand social and recreational activities for local people.	25 volunteers supported annually to increase confidence, self-esteem and social skills, enhance employability skills by obtaining qualifications (20% uptake), improve chances of meaningful employment and reduce social isolation	£23,450	£23,450	£23,450	£70,350	Over 4,000 using service – 25 volunteers supported each year. New Volunteering Strategy produced and 6 volunteering sessions offered, increasing numbers of volunteers working with Pantry. 2 young people supported on Young People's Guarantee secured employment and new trainee taken on; 3 new activity groups created including crafts, walking, Heritage and Play café and increasing number of participants engaging in classes, learning activities and café (approx. 2,500 users)
Volunteer Midlothian	Running costs for the Transform Project – an inclusive volunteering project that offers 14-25 year olds the opportunity to volunteer as part of a small group with full support and supervision.	32 young people volunteering per year; 80% more confident, continue with volunteering and/or in positive destination at end of volunteering; 90% achieving SCQF volunteering skills.	£21,509	£22,034	£22,475	£66,018	Exceeded targets set with 40 young people engaged in Transform. 168 sessions delivered, 13 young people attending Making Your Volunteering Count session and 24 taking part in SQA Volunteering Skills module. Successful event at Lasswade HS where young people organised and prepared afternoon tea for elderly members of Forward Mid. One young volunteer has become a Support Volunteer with Transform

RUTS - Vocational	Deliver nationally recognised (SQA & SCQF) vocational and sector specific qualifications specifically designed to support progress into employment, better employment and volunteering opportunities.	Increase confidence, wellbeing and motivation of participants and support them to gain qualifications and move into employment/modern apprenticeship – up to 50 per year will complete qualification; in work support to those moving into employment and intensive support to those that need it.	£22,493	£22,493	£22,493	£67,479	44 people using service - 38 qualifications achieved. 22 participants re-engaged with education or entered FE/HE. 2 participants moved into employment. 12 receiving intensive employability support. 7 training workshops delivered to 44 participants.
Access to Industry	Support unemployed residents who face significant disadvantage in moving into the labour market and whose learning and employment prospects are compounded by a history of substance misuse and/or offending. They may also have other barriers such as homelessness and mental health issues.	Person centred approach to those with multiple barriers to employment – 25 people assessed and action plans created; attendance at community-based classes; 6 people progress as peer supporters/volunteers; 10 jobs gained and sustained at 10 weeks.	£17,361	£17,361	£17,361	£52,082	34 people supported, 49 qualifications achieved, 8 progressing into volunteering roles, 4 into employment sustaining at 13 weeks, 2 re-entering employment, 4 into FE and 14 completed vocational skills training.  Clients achieving qualifications including work related ones and 11 now joined SQA Local Investigations Course.
<b>TOTAL</b>			<b>£144,421</b>	<b>£145,868</b>	<b>£147,452</b>	<b>£437,740</b>	

**Table 2 – Health Outcomes**

Organisation	Purpose	Outcomes	Awarded Year 1	Awarded Year 2	Awarded Year 3	Total Awarded (over 3 years)	Outputs/achievements from Year 1 monitoring
Y2K	Core costs towards the project which supports and improves the health and wellbeing of local young people as well as building their resilience and transferrable life skills.	Improve mental health of young people through project and 1:1 interventions; reduce risk taking behaviour through workshops and support and deliver healthy living programmes.	£23,050	£23,394	£23,748	£70,192	528 young people have used the service. 152 young people engaged in 1:1 support, 6 group work sessions delivered for 33 young people who are involved or are at risk of offending. 5 healthy living programmes with 44 young people. 40 young people achieved Dynamic Youth Awards
Gorebridge Community Cares	Support the delivery of a holistic programme of work to reduce inequalities focusing on 5 themes; physical and mental health, employment, education and training, green space and play.	Increase access for community members to sources of help to improve health & financial position; provide emergency funds for food, personal hygiene and clothing; improve family life by reducing social isolation & increasing connectiveness; cooking workshops for children; REHIS training for community members; CV and IT clinic delivered; provide befriending, support groups for those with ASN, study groups.	£22,966	£23,300	£23,300	£69,565	Over 1,000 people accessing services. 101 CAB referrals made, 130 signposting; 3 community trips 162 attending; 334 visiting Santa's Grotto; 15 cooking sessions delivered; 32 people accessed CV and IT clinic; regular activity groups (craft club and study club); 25 friendly voice calls and 29 sessions of Souper Friday (soup and rolls being distributed)
Edinburgh Rape Crisis Centre	To meet the increasing need for specialist, trauma-informed outreach support service for women, non-binary people and members of the transgender community aged 16 and over in Midlothian who are	Survivors of sexual violence feel safer and have greater control of their lives and choices; are more informed about the impacts of trauma and are able to self-manage these; increase their wellbeing and resilience.	£23,450	£23,450	£23,450	£70,350	63 people using service - 77 new referrals, provided trauma and counselling support to 63 survivors of sexual violence. 147 sessions of Here and Now support sessions for new adult referrals and 213 sessions of longer-term support. 40 people accessing Advocacy support through criminal justice

	affected by rape, sexual assault, childhood sexual abuse and commercial sexual exploitation.						advocacy.
Dalkeith CAB	Holistic outreach support for older people, isolated due to the impact of Covid, health conditions, disability, and other issues. Help provided through home visits, meeting at local community groups and by phone.	Older people facing fewer poverty related barriers through accessing all entitlements; increased confidence and wellbeing of older people; support through home visiting and engaging with other health agencies/projects.	£15,069	£14,797	£15,092	£44,958	628 people supported with financial gains of £226,882,37. Clients referred to other services e.g. health as appropriate.
Midlothian SureStart	"Family Friends" project to befriend/support peers focussed on families with children aged 0-3 who are struggling with low mood or social isolation.	Train buddies to support families to increase confidence, wellbeing and self-agency; 20 families supported annually to benefit from buddies approach	£22,542	£23,425	£23,436	£69,404	15 people using service and 15 families supported. 5 of the Buddies have undertaken Excel Training Programme to support them further as volunteer buddies; 4 buddies moved on.
Lothian Veterans	Provide advice and help to military veterans and their families; including housing and benefits advice, employability services, referral for health issues, emotional support, peer support, social inclusion activities and physical activities aimed at improving physical and mental health.	Increased social connectedness, reduced isolation and increased confidence for veterans and their families through delivering regular events, a safe place to meet, group activities, support and advice.	£18,550	£19,110	£19,670	£57,330	479 used service – 470+ registered users offered support and advice and access to wider services. 451 support sessions provided. 745 attendances at weekly social club (average of 20 per session)

MYPAS	Contribution to the core costs of the organisation to underpin delivery of all MYPAS current and future Midlothian services – drug and alcohol work, LGBT+ Service, Open Access Community Counselling, Family Counselling and Art Therapy.	Reduce issues around problematic substance use through intensive 1:1 support sessions for young people; provide targeted groupwork programmes to increase knowledge around problematic substance use; reduce social isolation of LGBT+ young people through support groups; improve mental health and wellbeing through open access community counselling for young people; family counselling sessions; art therapy sessions.	£22,796	£23,024	£23,254	£69,073	295 people accessed service – exceeded targets for open access community counselling, drugs and alcohol support work and one to one art therapy. 409 intensive 1:1 support sessions for 49 young people with substance use issues. 4 group programmes for 27 young people delivered. 44 groups provided on weekly basis. 14 young people engaged in ongoing individual support with 119 sessions delivered. 5 young people and their families received support. 50 young people attended 636 sessions.
Penicuik & District YMCA-YWCA*	Contribution towards core costs to support the establishment of a youth development programme and develop sustainable future through maximising income.	Reduce inequalities in health by developing work with young people through youth work and partnership working; increase opportunities for 1:1 support; reduce offending behaviours by providing safe community spaces & activities; improved access to training and learning for young people; create partnership with RUTS to develop a community hub; work with OSC providers to increase access for parents/children.	£21,454	£21,858	£21,858	£65,171	Focus of grant changed at end of Year 1 following some organisational difficulties in year 1. Outcomes renegotiated and governance agreed.  1,034 people engaged with project: 65 children accessing breakfast and after school activities; support to 185 families; delivered free hunger places; developed partnerships with Scots Corner and Ladywood CC's; delivered drama to 16 children weekly; free tennis coaching for families delivered; outdoor planting with families delivered.

Play Midlothian	Address inequalities and use play to benefit groups of children who might not have access, or who need additional wellbeing support, particularly those from disadvantaged communities, disabled children, and socially excluded groups.	Increase access to quality play experiences that support health and wellbeing, build skills and confidence; increase physical activity including open play sessions and targeted sessions for those with ASN and families.	£22,310	£20,112	£16,278	£58,700	796 used service - 156 sessions delivered - 73 stay for play sessions in Mayfield and Dalkeith; 79 non-school sessions; 60 school sessions; 320 Play for All sessions for disabled children and their families.
Children 1st	To meet the mental health and trauma recovery needs of Looked After Children and those on the Child Protection Register. Supporting children and their families to build confidence and resilience, facilitating access to help, reducing stigma and increasing social connectedness.	Support Kinship Carers through transition needs in placement; develop understanding of trauma on emotional development and ensure children's voices are heard; develop stronger relationships and confidence in family groups.	£23,295	£23,295	£23,295	£69,886	84 people used service – 13 families with total of 48 individuals; children within 5 families receiving direct trauma recovery support; 6 families undertaken whole family trauma support sessions.
Play Therapy Base	Play Therapy support for children 3-14 year old who are experiencing emotional distress or mental health issues. 1 to 1 Play Therapy sessions or Filial therapy with parent and child.	Support children in early years & their families to be healthy, to learn & to reach their potential & be resilient; offer access to timely and appropriate support; focus on care experienced children.	£22,938	£22,938	£22,938	£68,815	48 people used service - 15 children received 1:1 sessions, 18 families assessed for support, 14 children attended drop-ins.
<b>TOTAL</b>			<b>£238,420</b>	<b>£238,703</b>	<b>£236,319</b>	<b>£713,442</b>	

**Table 3 – Economic Circumstances**

Organisation	Purpose	Outcomes	Awarded Year 1	Awarded Year 2	Awarded Year 3	Total Awarded (over 3 years)	Outputs/achievements from Year 1 monitoring
MFIN	To coordinate financial inclusion activity across Midlothian focussing on key anti-poverty awareness raising activity. Develop an affordable food network and bring together agencies active in food and community growing. Support activity around tackling fuel and digital poverty and promoting solutions.	Maximise resources to tackle poverty and financial exclusion; individuals are better able to make informed financial choices; households better able to access food and fuel with dignity; reduce digital exclusion.	£14,113	£14,431	£14,968	£43,512	114 people engaged in service – weekly newsletter, meetings held every 6 weeks, commissioned research on affordable food in Midlothian, Affordable Food event held as part of Challenge Poverty Week, training in energy advice for staff and partners.
Home Link Family Support	Provide early intervention practical support to families with children in their early years to minimise the impact of poverty and to improve outcomes for the whole family.	Support 20 families to access benefits, housing, energy and debt advice to make real sustainable changes; Families will be more confident to participate in community activities; improve health and wellbeing of children and families through offering play opportunities, group work, engagement with early years and family learning.	£19,529	£19,872	£20,221	£59,622	128 people used service – supported 76 children and 41 families with 75% lone parents and 80% living in 3 priority areas. 20 families attending stay and play sessions, PEEP and Bookbug and linking in with local activities. 41 families accessing home visiting support.

MAEDT	To continue to operate and provide essential services and facilities for the people of Mayfield and Easthouses. To grow and develop new services and facilities in response to needs identified by the community.	Advocate for people of Mayfield through involvement in forums, working groups & committees; increase use of outdoor space and income using community garden and pavilion; develop café, garden and pantry to increase access to healthy food, volunteering and training opportunities for local people; alleviate effects of poverty.	£23,450	£23,450	£23,450	£70,350	<p>2000 people used service – 7 supported to access planning system to voice objections to local applications. Record number of people using Pavilion over summer period; café and lunch club popular amongst older and more isolated people; room and garden hires increasing; café now generating profit.</p> <p>Secured funding for outdoor cooking facilities and sessional staffing to deliver community cooking sessions.</p> <p>Work with Lawfield Nursery – children achieving Grow and Learn in Nature Awards, youngest group in Scotland.</p>
<b>TOTAL ECONOMIC CIRCUMSTANCES</b>			<b>£57,092</b>	<b>£57,753</b>	<b>£58,639</b>	<b>£173,484</b>	

Table 4 – Carbon Emissions

Organisation	Purpose	Outcomes	Awarded Year 1	Awarded Year 2	Awarded Year 3	Total Awarded (over 3 years)	Outputs/achievements from Year 1 monitoring
The Orchard Project	Create and develop a food forest with orchard, a training and demonstration site, at the Midlothian Community Hospital	Foster greater biodiversity; provide a reliable and usable yield contributing to food security; develop and upskill	£12,300	£11,900	£13,100	£37,300	104 people have been in attending events such as training workshops and community days and designing



	(MCH).	volunteers; build stronger sense of community, achievement and climate action.					and planting the forest garden.
Changeworks	Develop and support community climate action in the Dalkeith area to take action to address the climate emergency.	Engage 2,000 people in Dalkeith area over 3 years to raise awareness of climate change and carbon positive actions towards net zero.	£16,149	£16,101	£16,421	£48,670	594 people have accessed the service. Focus has been on establishing project within the community of Woodburn/Dalkeith. 103 families supported to act. 4 events hosted and 14 drop-in sessions run.  16 referrals made to Home Energy Scotland and 15 to Affordable Warm Service.  25 people attended event on Air Source Pumps.  Maidrop now in place to engage vulnerable households and building partnerships with local groups.
Cyrenians	Deliver a range of activities centred around food growing and support people to grow their own and learn what to do with the produce.	Support communities to be more self-sustaining and socially connected; increase access to affordable food and promote food growing; develop employment and volunteering in green sector; conserve green spaces.	£15,910	£15,794	£16,108	£47,812	Engaged with 309 people. Delivered 1 block of cooking sessions, supported volunteers joining garden team, delivered 14 community meals with 259 people attending, running weekly free food drop in.
<b>TOTAL</b>			<b>£44,359</b>	<b>£43,795</b>	<b>£45,629</b>	<b>£133,782</b>	

**3.12** In addition, for the 2022/25 round, transition funding of £101,551 was awarded to 4 organisations over the same three-year period. This was awarded to groups who did not qualify for a large grant due to availability of funding but were defined as meeting a need where there was an existing gap in service provision (Table 5).

Organisation	Purpose	Awarded Year 1	Awarded Year 2	Awarded Year 3	Total Awarded (over 3 years)	Outputs/achievements from Year 1 monitoring
Grandparents Parenting Again & Kinship Carers (MIDLOTHIAN)	Peer support worker to deliver training.	£2,610	£5,219	£5,219	£13,048	46 people used service – 7 kinship families supported on 1:1 basis; group sessions offered; 2 visits from Champion Board to support group
Pathhead Youth Project	Delivery of youth work and summer programme for under 18s in the area.	£5,449	£5,129	£5,185	£15,763	34 people accessed service – drop-ins run; all summer activities fully booked; young people participated in community events including school fair, Cranston WRI, Pathhead Music Collective Ceilidh
Midlothian Foodbank	Contribution to running and staffing costs to deliver emergency food aid.	£12,633	£12,633	£12,633	£37,899	6,400 accessed service in total – emergency food demand up by 13%. 2,800 people received parcels. Thursday lunch club growing with Dalkeith CAB providing informal advice and support to participants
Food Facts Friends	Contribution to running and staffing costs to deliver activities from the community hub.	£12,050	£11,164	£11,627	£34,841	1,101 people accessed the service overall. Food collections expanded with better choice; addition of Food Pantry store. Children 1 <sup>st</sup> have permanent space in Hub; instalment of recycling used clothing box; free food provided outside front door; learn digital skills and job group amalgamated to provide job search assistance and advice
<b>TOTAL</b>		<b>£32,742</b>	<b>£34,145</b>	<b>£34,664</b>	<b>£101,551</b>	

**3.13** The current grant funding is in place until March 2025; however, work requires to be carried out in 2024 if the funding is to continue for a future three-year round. The indicative timetable is as follows:

- Design of funding criteria and promotion: **April 2024 – July 2024**
- Applications open: **August 2024 – September 2024**
- Assessment of applications: **October 2024**
- Recommendations to Council for approval: **November 2024**
- Notification to applicants of funding outcome: **December 2024**

**3.14** In light of the challenges set out in 3.4-3.8 and the proposal to establish a SLWG to develop a strategic approach to funding, **Council is asked to consider the following options and approve option 4 as recommended by officers:**

- Option 1 – continue the programme in its current state and progress planning activity for the 2025/28 funding period.
- Option 2 – cease the funding for the 2025/28 period which would generate a recurring annual saving of £520k.
- Option 3 – continue the programme with a reduction to the funding (value to be determined).
- Option 4 – continue the existing programme for one further financial year to enable further work to be undertaken on the future of the programme.

## **4 Report Implications (Resource, Digital and Risk)**

### **4.1 Resource**

The fund is currently circa £1.5m over three years. For the Commissioning workstream under Follow the Money, resource (for 6-12 months) was agreed from BTSG at its meeting of 4 September 2023, which has been primarily focussed on Health and Social Care commissioning. Significant progress has been made in this area and it is anticipated that this can continue whilst the remainder of the approved funding is realigned to focus on grants/commissioning in a wider scope. An update on the Health and Social Care work will be presented to BTSG in Spring 2024, with the opportunity for further discussion on this workstream.

### **4.2 Digital**

No implications

### **4.3 Risk**

Significant reputational risk where any changes are made to the funding model and consequential impacts on the service users of no continued funding for projects.

**4.4 Ensuring Equalities (if required a separate IIA must be completed)**

Any proposed changes would be subject to an IIA.

**4.5 Additional Report Implications (See Appendix A)**

See Appendix A

**Appendices****Appendix A – Additional Report Implications**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

The themes in which the funding has been allocated is in line with delivery of the Single Midlothian Plan priorities.

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☒ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☐ Sustainable
- ☐ Transformational
- ☒ Preventative
- ☐ Asset-based
- ☐ Continuous Improvement
- ☐ One size fits one
- ☐ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☒ Preventative and Sustainable
- ☐ Efficient and Modern
- ☐ Innovative and Ambitious
- ☐ None of the above

### A.4 Delivering Best Value

Not applicable

### A.5 Involving Communities and Other Stakeholders

Savings proposals were subject to community consultation in 2022/23 in advance of the Council's budget setting process.

### A.6 Impact on Performance and Outcomes

Changes to funding could negatively impact on outcomes for communities.

### A.7 Adopting a Preventative Approach

Early intervention through some of these projects can prevent further negative impacts on communities and reduce poverty and inequality.

### A.8 Supporting Sustainable Development

Not applicable



## **Midlothian Council Housing Allocation Policy Review 2023/24**

**Report by Kevin Anderson, Executive Director - Place**

### **Report for Decision**

#### **1 Recommendations**

- 1.1 It is recommended that Council approves the outcome results of the Housing Allocation Policy Review consultation with all Midlothian Council tenants, waiting list applicants, stakeholders and tenant groups during the Winter 2023 period as listed in Section 6 of the report.

#### **2 Purpose of Report**

- 2.1 As part of Midlothian Council's commitment to involving tenants and other service users in the management of housing services it undertook a planned consultation on the Housing Allocation Policy in January 2024. The previous Housing Allocation Policy was written in 2019 and required updating in order to reflect legislative changes, make best use of the housing stock and how our council housing properties are allocated.

**Date:** 28 February 2024

**Report Contact:** Kevin Anderson, Executive Director, Place

**Tel No :** 0131 271 3102

[kevin.anderson@midlothian.gov.uk](mailto:kevin.anderson@midlothian.gov.uk)

### 3 Background

The Housing Allocation Policy was last revised in 2019 when it was agreed that Council will review the policy every two years. The bi-annual review process and consultation opportunities were disrupted due to the pandemic.

Scottish Government guidance requires that houses are let in a way that gives reasonable preference to those in greatest housing need, which makes best use of the available stock and helps to sustain communities. It is important for every social landlord to have an allocation policy that complies with all relevant legislation and statutory guidance whilst also reflecting local housing needs.

The legislative and regulatory framework for the allocation of social rented sector homes has evolved over time, including through the Housing (Scotland) Act 1987, the Housing (Scotland) Act 2001 and the Housing (Scotland) Act 2014. This Allocation Policy must comply with the homelessness rules set out in Part II of the 1987 Act (as amended by the 2001 Act and the Homelessness etc. (Scotland) Act 2003).

Midlothian Council, as a landlord, has a duty to make and publish rules covering priority of allocation of houses, transfers and exchanges (section 21 of the 1987 Act, as amended by section 155 of the Leasehold Reform, Housing and Urban Development Act 1993 and the 2001 Act). This allocation policy must set out clearly how Midlothian Council will decide on priority for housing.

### 4 Legislative Requirements

Legislation dictates that a Housing Allocation Policy must give reasonable preference to the undernoted circumstances:

- Homeless persons and persons threatened with homelessness.
- People living under unsatisfactory housing conditions.
- Under-occupying social housing tenants

Landlords can decide on the priority it wishes to give to those in each of these reasonable preference groups.

### 5 Housing Allocation Policy Review Consultation

The Housing (Scotland) Act 2014 requires landlords to consult with:

- Applicants on the housing list
- Tenants
- Registered Tenant Organisations



In January 2024 Midlothian Council officers consulted on the Policy using the following methods:

- A survey sought the views of tenants, housing applicants and stakeholders. The survey could be completed online, via a link on the council's social media pages or respondents could request a paper copy.
- A series of eight public drop-in information events were held in libraries across Midlothian.

The consultation ran from Monday 8 January to Wednesday 31 January 2024. 319 surveys were completed and 20 people attended the public drop-in sessions. The survey results are illustrated within the appended consultation report which includes the original questions and accompanying information provided.

## **6 Recommendations in the results rates received from the consultation are:**

- **Retention of group and points system**  
It is recommended to maintain the current system.
- **Online Housing Application and portal**  
It is recommended to implement with overwhelming 94% support
- **Combining letting areas**  
It is recommended by 83% to align with the community council boundaries
- **Letting targets**  
It is recommended to retain current letting percentages
- **Homeless waiting time**  
It is recommended to start homeless waiting time points from the date of homelessness.
- **It is recommended to Increase points values as:**
  - (a) Safety points 100 – to support Harassment and Domestic Abuse
  - (b) Downsizing by two bedrooms - 250 points
  - (c) Introduce Notice to Quit from private landlord points – 30 points
- **Dedicated points for specialist supported groups.**  
It is recommended to implement specific points to National Housing Project and Housing First
- **Mutual Exchange**  
It is recommended to consider offering a choice of supports, such as support to physically move home and quicker incentive payment process.

- **Local Letting Initiative for New Builds**  
 (a) It is recommended to prioritise Midlothian Council tenants, and merge Tiers 1 and 2, supported by 75%.  
 (b) Housing Associations applicants to remain in Tier 3, according to 65% of respondents.
- **Suspension of Applications**  
 It is recommended to review the suspension policy in line with legislation
- **Participation groups**  
 It is recommended to contact the 72 respondents interested in joining a local group for further engagement activity opportunities..

## **7 Report Implications (Resource, Digital and Risk)**

### **7.1 Resource**

There are no resource implications arising directly from this report.

### **7.2 Digital**

There are no digital implications.

### **7.3 Risk**

There is a risk to the Council if there is no regular review process that the Housing Allocation Policy does not comply with legislation or guidance from the Scottish Housing Regulator.

### **7.4 Ensuring Equalities (if required a separate IIA must be completed)**

Equality is central to all housing and housing services delivery. An Integrated Impact Assessment (IIA) has been undertaken on the Local Housing Strategy 2021-26 to ensure that the needs of local communities have been fully considered. The SHIP reflects identified needs and draws on findings from the IIA when considering the implications flowing from the translation of strategic aims into housing policies.

### **7.5 Additional Report Implications (See Appendix A)**

See Appendix A

## **Appendices**

Appendix A - Additional Report Implications

Appendix B – Allocation Policy Consultation Report 2024

## **APPENDIX A – Report Implications**

### **A.1 Key Priorities within the Single Midlothian Plan**

The themes addressed in this report impact on the delivery of the Single Midlothian Plan outcome particularly in terms of priorities in relation to the delivery of affordable housing, homelessness and health and social care outcomes through the provision of specialist housing.

### **A.2 Key Drivers for Change**

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☒ Sustainable
- ☐ Transformational
- ☒ Preventative
- ☒ Asset-based
- ☒ Continuous Improvement
- ☐ One size fits one
- ☐ None of the above

### **A.3 Key Delivery Streams**

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☒ Preventative and Sustainable
- ☐ Efficient and Modern
- ☐ Innovative and Ambitious
- ☐ None of the above

### **A.4 Delivering Best Value**

We manage all aspects of our business so that tenants and other customers receive services that provide value for money in the rent and other charges they pay.

### **A.5 Involving Communities and Other Stakeholders**

A full consultation was available to Midlothian Council tenants and waiting list applicants. Stakeholders will be informed of outcomes at the regular Local Housing Strategy Forum meetings.

### **A.6 Impact on Performance and Outcomes**

The Policy review supports key objectives to accurately assess housing need so Midlothian Council officers can then let vacant properties to those with the greatest assessed need.

### **A.7 Adopting a Preventative Approach**

The Housing Allocation Policy provides a clear framework for prioritising applicants based on housing need and the reasonable preference criteria, which is set out in legislation. Regular monitoring and review is important to ensuring the Housing Allocation Policy makes best use of housing stock to meet housing need.

### **A.8 Supporting Sustainable Development**

Good practice in relation to energy efficiency and sustainability is contained in the SHIP and Local Housing Strategy 2021/22 – 2025/26.

### **Background Papers:**

[Midlothian Housing Allocation Policy 2022](#)

# Midlothian Council

## Housing Allocation Policy Consultation Report 2024



Midlothian Council new build development, Clerk Street, Loanhead

## Introduction

As part of Midlothian Council's commitment to involving tenants and other service users in the management of housing services it undertook a planned consultation on the Housing Allocation Policy in January 2024. The previous Housing Allocation Policy was written in 2019 and required updating in order to make best use of housing stock and how properties are allocated.

Scottish Government guidance requires that houses are let in a way that gives reasonable preference to those in greatest housing need, which makes best use of the available stock and helps to sustain communities. It is important for every social landlord to have an allocation policy that complies with all relevant legislation and statutory guidance whilst also reflecting local housing needs.

## Key Legislation and Guidance

The legislative and regulatory framework for the allocation of social rented sector homes has evolved over time, including through the Housing (Scotland) Act 1987, the Housing (Scotland) Act 2001 and the Housing (Scotland) Act 2014.

This Allocation Policy must comply with the homelessness rules set out in Part II of the 1987 Act (as amended by the 2001 Act and the Homelessness etc. (Scotland) Act 2003).

Midlothian Council as a landlord has a duty to make and publish rules covering priority of allocation of houses, transfers and exchanges (section 21 of the 1987 Act, as amended by section 155 of the Leasehold Reform, Housing and Urban Development Act 1993 and the 2001 Act). This allocation policy must set out clearly how Midlothian Council will decide on priority for housing.

There is a range of statutory guidance which has been referred to when reviewing this Allocation Policy including:

- The Legal Framework for Social Housing Allocations, Statutory Guidance for Social Landlords, Housing (Scotland) Act 2014
- Minimum Period for Applications to remain in force –Suspensions Under Section 20B of the Housing (Scotland) Act 1987. Statutory Guidance, Housing Scotland Act 2014
- The Scottish Government's Code of Guidance on Homelessness 2005 (updated in 2019) - [Supporting documents - Homelessness: code of guidance - gov.scot \(www.gov.scot\)](https://www.gov.scot/supporting-documents/homelessness-code-of-guidance)
- Scottish Social Housing Charter
- The Equality Act 2010 (Specific Duties) (Scotland) Regulations 20121 (as amended).
- The Equality and Human Rights Commission's Services, Public functions and Associations: Statutory Code of Practice
- Housing to 2040 - [Housing to 2040 - gov.scot \(www.gov.scot\)](https://www.gov.scot/housing-to-2040)

This allocation policy is also aligned with internal housing related strategies including:

- Midlothian Local Housing Strategy 2021 – 2026 - [Housing strategy and performance documents | Midlothian Local Housing Strategy 2021-2026](#)
- Midlothian Rapid Rehousing Transition Plan - [Rapid Rehousing Transition Plans | Rapid Rehousing Transition Plan 2022/23 - 2023/24 \(midlothian.gov.uk\)](#)
- Midlothian Strategic Housing Investment Plan 2024/25 – 2028/29 - [Strategic Housing Investment Plans \(SHIP\) | Strategic Housing Investment Plan 2024/25 - 2028/29 \(midlothian.gov.uk\)](#)



## Consultation

### Consultation Method

In January 2024 Midlothian Council officers consulted on the Housing Allocation Policy using the following methods:

- A survey sought the views of tenants, housing applicants and stakeholders. The survey could be completed online, via a link on the council's social media pages or respondents could request a paper copy
- A series of eight public drop-in information events were held in libraries across Midlothian

The consultation ran from Monday 8 January to Wednesday 31 January 2024.

### Consultation Results

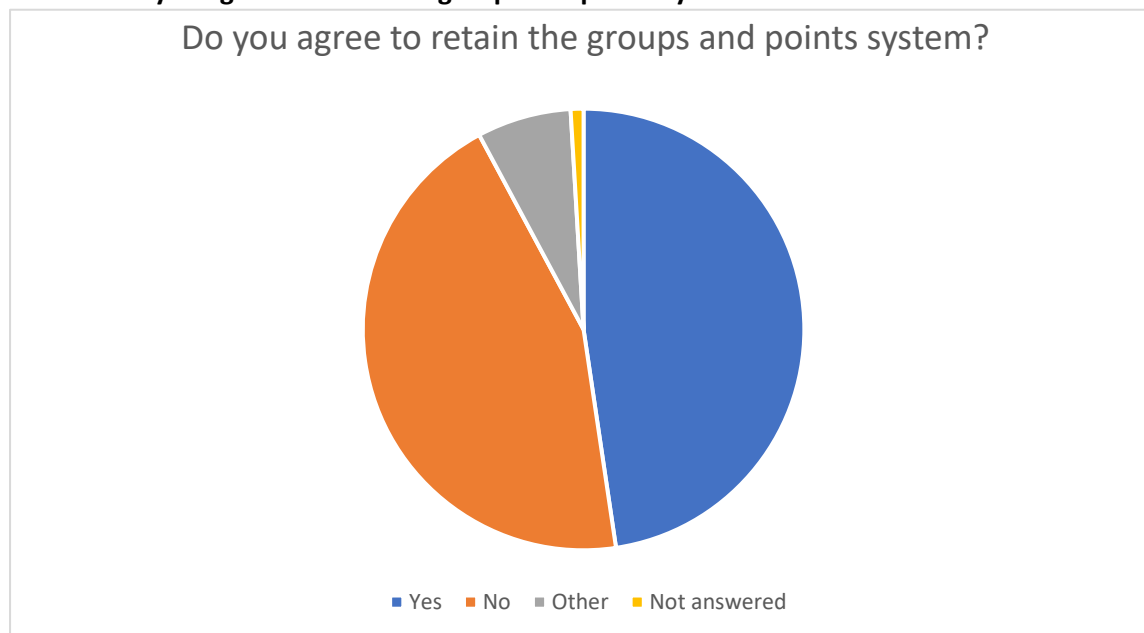
319 surveys were completed and 20 people attended the public drop-in sessions. The survey results are illustrated below with the original questions and accompanying information provided. A recommendation for each question will follow.

Chart 1 below shows that a slight majority of respondents favoured retaining a group and points system of housing allocation (48%); whilst 45% opted against it. The remaining 7% chose 'other'.

#### **Question 1 - Do you agree to retain the groups and points system?**

There are two ways to allocate properties in Scotland, groups/points or choice-based letting. We currently operate a groups/points system, where you are placed into one of two groups - Homeless or General Needs. You are then given points depending on your circumstances. This means that you are shortlisted for every property available within your selection of areas and the person with most need is allocated the home. Choice-based letting is where instead of being assigned a home automatically, applicants express preferences for available homes. The applicants are placed in order of most in need. This allows applicants to see the available properties, however applicants must remember to register interest each week.

**Chart 1: Do you agree to retain the groups and points system?**



Comments received on question 1 and the groups and points system:

*'The point system is good but it would be good to see the available properties and be able to put forward for the properties you like'*

*'First come first served. Keep point system and choice. Be transparent like Edinburgh. Advertise available properties let people bid. Person with most points got priority to view accept property. If declined next one with most points offered it.'*

*'We need more housing to make either of the options credible'*

### Recommendation

Based on the similar support for both retaining and removing the group and points system, it is recommended that it should remain as Midlothian Council's system of housing allocation.

#### Allocation Policy Review Outcome 1: Retain group and points system of housing allocation

Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
No action required	Group and points system in use	N/A	N/A



**Question 2 - Would you like to be able to apply online for a council house and to update your details via an online applicant's portal?**

Table 1 below shows very clearly that 94% of respondents would like an online housing application with applicant's portal in order to update and refresh details as required. Just 6% opted against this.

**Table 1: Would you like to be able to apply online for a council house and to update your details via an online applicant's portal?**

	Number of respondents	% of respondents
Yes	300	94%
No	19	6%

**Recommendation**

Based on the very high level of support, it is recommended that Midlothian Council implements an online housing applicant portal which enables applicants to update and refresh their details as required.

**Allocation Policy Review Outcome 2: Creation of online housing application and applicant portal**

Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Creation of applicant portal	Housing application can currently be downloaded, not completed online. Amendments are made by email/phone.	September 2024	-Housing Services Team -Communication and Marketing Team

**Question 3: Do you agree to combine the housing areas as per the community council boundaries?**

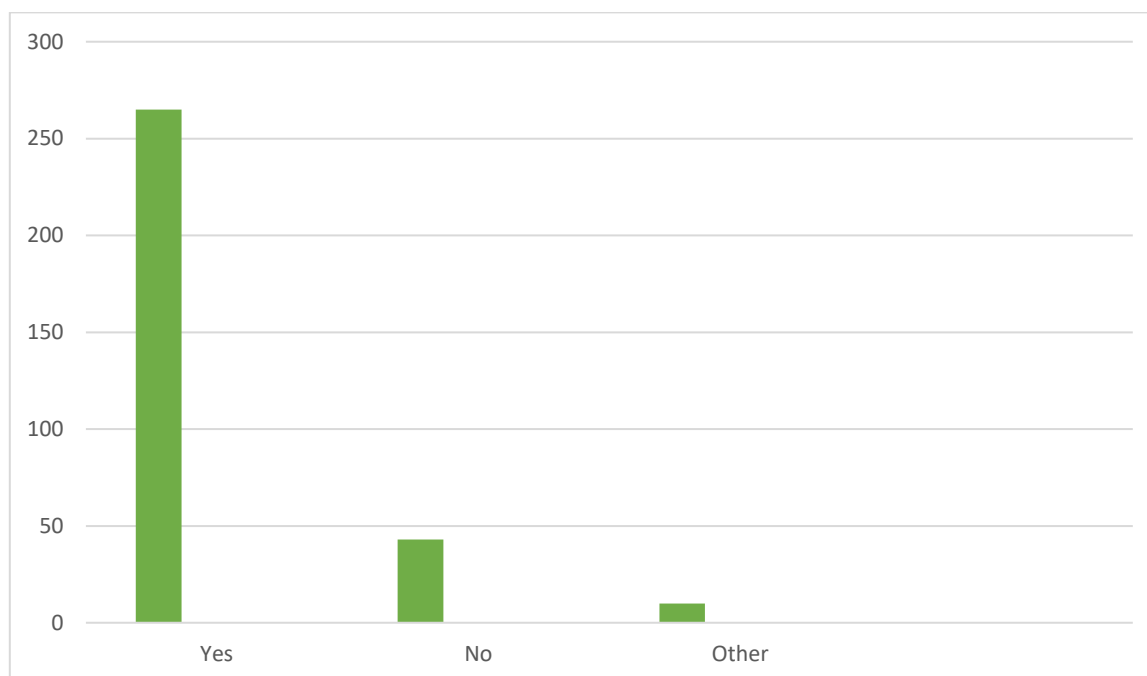
With the increase in new builds in our towns, our boundaries are moving and so we would like to mirror the community council boundaries.

Find the link to the community council boundaries on the overview page of this survey or paste [www.midlothian.gov.uk/communitycouncils](http://www.midlothian.gov.uk/communitycouncils) into your browser.

For example, Danderhall would become Danderhall and district including Shawfair, Wellington, and Millerhill, and Bonnyrigg would become Bonnyrigg and district including Poltonhall and Lasswade.

Chart 2 below shows that 83% of respondents chose to align housing areas with those of the community council boundaries with 13% preferring the status quo and the remaining 3% choosing 'other'.

Chart 2: Do you agree to combine the housing areas as per the community council boundaries?



### Recommendation

Based on the high level of support, it is recommended that housing letting areas are aligned with community council boundaries.

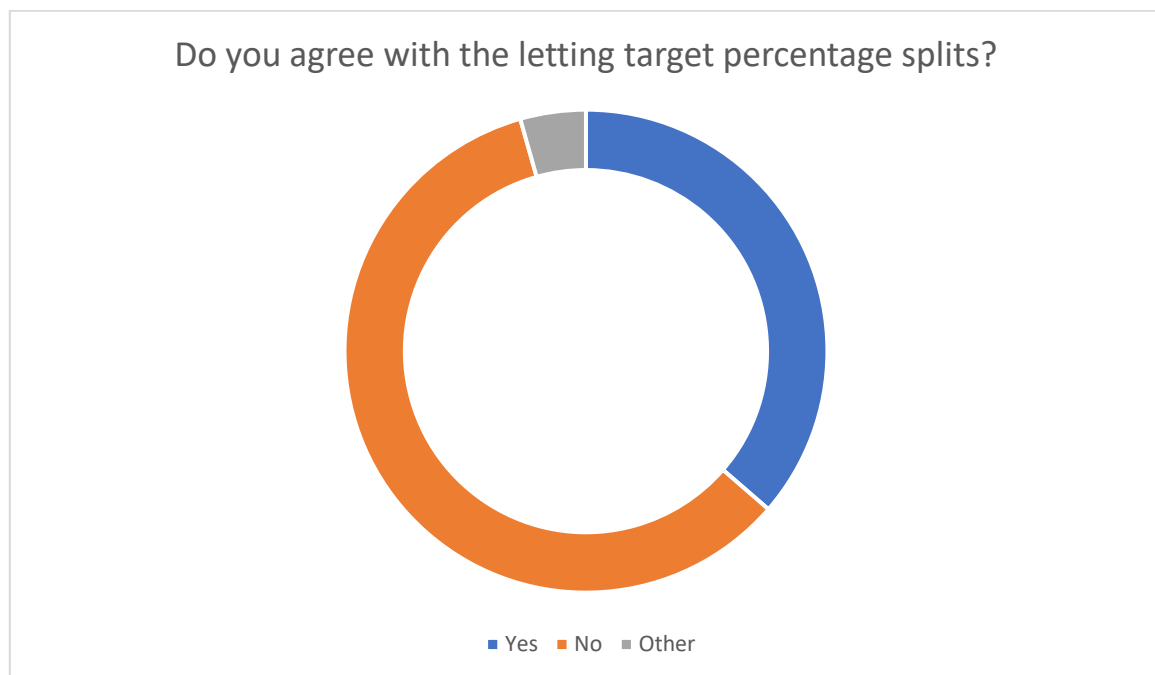
Allocation Policy Review Outcome 3: Align housing areas with those of the community council boundaries			
Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Update housing areas on application form	Housing application currently contains historic areas	September 2024	-Housing Services Team -Communication and Marketing Team
Update housing areas for existing applications on waiting lists	Waiting lists currently using historic areas	April 2025	-Housing Services Team -Business Systems

Question 4: Currently Midlothian Council has a target of letting 60% of its homes to homeless applicants and 40% to general needs applicants.

Do you agree with the percentage splits?

319 people answered this question. Chart 3 below illustrates that 59% of respondents disagree with the percentage splits, 36% agree and the remaining 4% opted for 'other'.

Chart 3: Do you agree with the letting target percentage splits?



Comments received on question 4 and the letting target percentage split:

*'Homelessness is a problem there is no denying that however there are people on the general needs list who are not homeless but are in need of their own home/space who cannot afford to private let or indeed buy'*

*'Homeless people should be getting houses before people should be getting a "move ". Focus on helping the homeless & those in temporary housing'*

*'In theory yes, however, too many abuse the system and find immoral ways of getting more points. Too many declare themselves homeless, when that's not strictly true. There needs to be a fairer way to allocate housing and prevent this happening'*

## Recommendation

It is recommended that the letting target percentage splits remain as they are – 60% for homeless households and 40% for general needs applicants, reducing the length of time in temporary accommodation and the statutory homeless system; to allocate to those in most need.

**Allocation Policy Review Outcome 4: Current Midlothian Council target of letting 60% of its homes to homeless applicants and 40% to general needs applicants to remain**

Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
No action required	Current target of 60% to homeless households and 40% to general needs applicants	N/A	N/A

Question 5: All applicants have waiting time points from the date we receive their housing application. When applicants move lists they keep those points. This means when a property is offered to a homeless person it may not be offered to the person who has been homeless the longest.

Do you agree that applicants on the homeless list should be made an offer based on how long they have been homeless for?

Table 2 below shows that 64% of respondents agree that homeless applicants should receive an offer of housing based on how long they have been homeless for, not based on the length of time they have had an application form submitted. Over a third (36%) disagree and would prefer to remain with the current system.

**Table 2:** Do you agree that applicants on the homeless list should be made an offer based on how long they have been homeless for?

	Number of respondents	Percentage of respondents
Yes	203	64%
No	116	36%

## Recommendation

Based on the level of support, it is recommended that homeless waiting times should start at the date of homelessness to ensure that those who have been homeless longest, receive an offer of housing first.

Allocation Policy Review Outcome 5: Homeless waiting times to start at the date of homelessness			
Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
General needs waiting time points to be cleared if applicant becomes homeless	General needs waiting time points remain on application	Ongoing on receipt of homeless application	-Homelessness and Housing Options Team

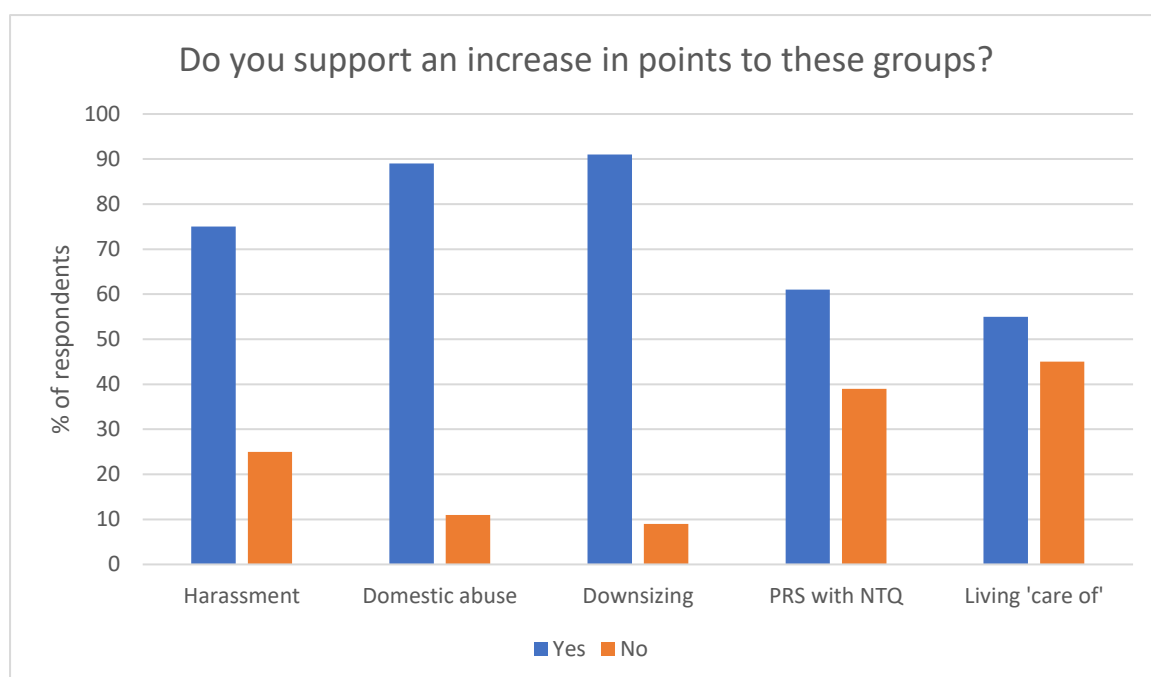
Question 6: We would like to review the following groups of points:

- a) Do you support an increase in points if you have been harassed?
- b) Do you support an increase in points if you have suffered domestic abuse?
- c) Do you support giving extra points for downsizing by at least two bedrooms to free up the larger home for a family in need?
- d) Do you support additional support for people in private lets who have been given notice to leave but who do not yet meet the homeless priority criteria?
- e) Do you support an increase to 'living care of address' points? These are points where an applicant is living at an address where they are not the main tenant.

Chart 4 below illustrates the responses to each category.

- a) Harassment points – 75% of respondents supported an increase in points whereas 25% did not.
- b) Domestic abuse points – 89% of respondents supported an increase in points whereas 11% did not.
- c) Downsizing by two bedrooms – 91% of respondents supported an increase in points whereas 9% did not.
- d) Received notice to quit from private let but not homeless – 61% of respondents supported an increase in points whereas 39% did not.
- e) Living 'care of address' – 55% of respondents supported an increase in points whereas 45% did not.

Chart 4: Do you support an increase in points to these groups?



#### Recommendation

- Harassment points – 100 additional points to be added to housing application
- Domestic abuse points – 100 additional points to be added to housing application
- Downsizing by two bedrooms – 250 additional points to be added to housing application
- Received notice to quit from private let but not homeless – 30 additional points to be added to housing application
- Living 'care of address' – no points increase to this category

#### Allocation Policy Review Outcome 6: Additional points awarded to housing applicants who – have suffered harassment, domestic abuse, are downsizing by two bedrooms and PRS tenants who have received a NTQ

Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Update housing application form to reflect new category awards	Housing application form reflects existing category awards	August 2024	-Housing Officer Team -Communication and Marketing Team
Update points for existing housing applications based on new category awards	Application points are based on existing category awards	March 2025	-Housing Officer Team

Question 7: There are two projects where applicants have enhanced support to enable them to manage a tenancy. The first is the National Housing Project for young people who are care-experienced. Housing First, for those with complex needs and repeat homelessness, is the second. It is therefore important to be able to prioritise those groups when they are ready to move to a secure tenancy, so that the good work is not lost between being tenancy ready and awaiting a new home.

In cases where the tenant will be supported and ready to manage a tenancy, do you support separate points for the National Housing Project and Housing First?

Table 3 below illustrates that 66% of respondents support the creation of separate points for applicants who receive support from the National Housing Project and Housing First. This was not supported by 34% of respondents.

**Table 3: In cases where the tenant will be supported and ready to manage a tenancy, do you support separate points for the National Housing Project and Housing First?**

	Number of respondents	Percentage of respondents
Yes	210	66%
No	109	34%

### Recommendation

Based on the level of support from respondents, it is recommended that housing applicants who receive support from the National Housing Project and Housing First have 250 separate points added to their housing applications.

#### Allocation Policy Review Outcome 7: Housing applicants who receive support from the National Housing Project and Housing First have separate points added to their housing applications

Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Update points for existing housing applications based on new category	Application points are based on existing category awards	June 2024	-Housing Officer Team

**Question 8: Last year between 1st April 2022 and 31st March 2023 we let 115 homes out of 184 homes to applicants with medical points. So you will see a high percentage of homes go to applicants with medical points.**

**Do you have any comments or suggestions about how we allocate our medical points?**

There were 132 responses to this question. Table 4 below contains a balanced range of the comments received.

Comment
That isn't fair. General People get over looked time and time again.
Fully support medical points however they should be allocated on a case by case basis. For example someone with say COPD living in a ground floor flat isn't going to get any better moving to another ground floor, where as someone with COPD in a first floor would benefit more from the ground floor, even though they have the exact same conditions.
Maybe also allocation medical points based on each person in the house that suffers with medical needs so not just 1 persons but take all in to consideration
I do not agree that there should be a medical points cap. I have 3 children on child disability payment
To improve health and social inclusion. They should be housed in the same area as their support and social networks.

Housing should be first come first served.
Take in more consideration towards people with mental / physical health and try understand their situations
Physical conditions should be taken into account much much more than any other disability as these people require physical changes to their home in order to live like everyone else

Question 9: We currently provide Midlothian Council tenants who downsize by 1 bedroom a payment of £1,000 and Midlothian Council tenants who downsize by 2 or more bedrooms a payment of £1,500. We also provide a Mutual Exchange grant of £250 to any Midlothian Council tenant who mutual exchanges to another property.

If you are looking to move, what incentive would you need to exchange your home by Mutual Exchange?

If you have an extra bedroom and are willing to downsize, what would be a good incentive to make you do so?

There were 102 responses to these questions. Table 5 below contains a balanced range of the comments received for Mutual Exchanges and the Incentive to Move Scheme.

Table 5: Comments and suggestions received for the Mutual Exchange and Incentive to Move Schemes
<b>Comment/suggestion – Mutual Exchange</b>
Meet the neighbours beforehand. Help with mutual exchange forms.
Free removal van and extra time to move
Financial incentive but more importantly easier access to actual available properties as they are not always clearly listed most people who want to exchange do it through social media
<b>Comment/suggestion – Incentive to Move Scheme</b>
My mum tried this and it wasn't as straight forward as the council advertised. There was still a waiting list, forms to fill out, all that stuff, people who are downsizing should basically be offered a choice of 3 houses that you know are available. It makes sense for the council to make this move as straight forward as possible.... Also you take forever to pay out the money, my mums waited ages it should be done the same day they sign the new lease.
I for one would find it hard to start again and a move is not as black and white as some think after 20 years of being settled and memories. An incentive would be having a bit of a choice in the house you move to
Help towards moving costs or new floor etc
Offer a removal service
Support with the physical move. £1000 won't go far.



Question 10: Our current Local Letting Initiative for new build properties is as follows- available properties are allocated to suitable applicants in the following order of priority:

Tier 1- Allocate to existing council tenants on the housing list who currently live in the letting area where the new property has been built.

Tier 2- Allocate to existing council tenants on the housing list who live elsewhere in Midlothian.

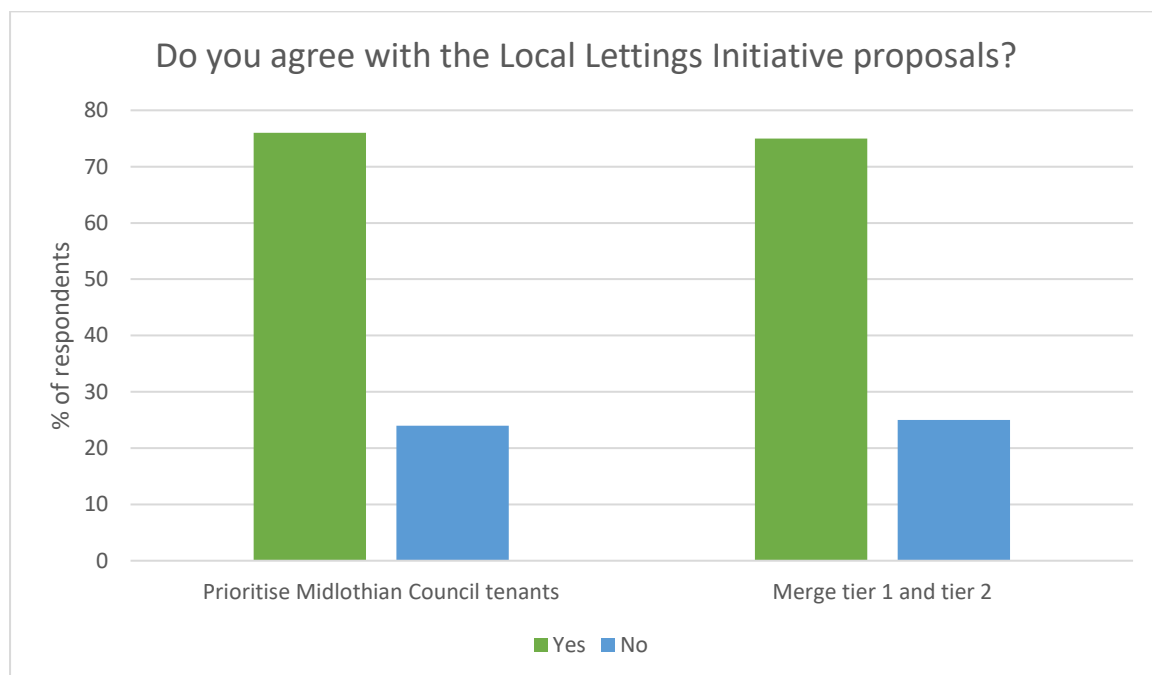
Tier 3- Allocate to housing list applicants who have chosen the letting area in which the new property was built. The applicant must have no recent housing related anti-social behaviour.

- a) Do you agree with our letting initiative prioritising Midlothian Council tenants?
- b) Would you agree to merge Tier 1 and Tier 2?

Chart 5 below illustrates the responses to each category:

- a) Prioritising Midlothian Council tenants – 76% of respondents agreed that Midlothian Council tenants should be prioritised whereas 24% did not.
- b) Merging tier 1 and tier 2 – 75% of respondents agreed that the tiers should be merged whereas 25% did not.

**Chart 5: Do you agree with the Local Lettings Initiative proposals?**



**Recommendations:**

Based on the level of support from respondents, it is recommended that Midlothian Council tenants should continue to be prioritised when allocating new build properties. Additionally tiers 1 and 2 should be merged which would allow a similar prioritisation for tenants who live in a different area of Midlothian from the new build development.

Allocation Policy Review Outcome 9: Merge tiers 1 and 2 of the new build Local Lettings Initiative (LLI)			
Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Reconfigure new build waiting list based on merging on tiers 1 and 2 of LLI	New build properties are offered to MC tenants in the local housing area in the first instance before then being offered to MC tenants in Midlothian	Ongoing process at point of new build shortlisting	-Housing Officer Team

Question 11: As part of LLI, Housing Association (HA) tenants current shortlist under Tier 3, along with Homeless group and rest of the General need applicants i.e. if you are in a private let or living with someone awaiting accommodation. We have been asked to consider prioritising HA applicants under Tier 1 and Tier 2 for Midlothian Council New build homes. HAs have their own separate allocation policies which can be viewed on their websites.

Should we remain with the LLI as it currently is with HA applicants shortlisting with the rest of the General Needs group at Tier 3?

Table 6 below illustrates that 65% of respondents supported the status quo; Housing Association tenants remaining with the rest of the General Needs group in tier 3 of the Local Lettings Initiative. In contrast, 35% of respondents did not.

**Table 6: Should we remain with the LLI as it currently is with HA applicants shortlisting with the rest of the General Needs group at Tier 3?**

	Number of respondents	Percentage of respondents
Yes	207	65%
No	112	35%

### Recommendation

Based on the level of support from respondents, is recommended that Housing Association applicants should remain in tier 3 of the Local Lettings Initiative prioritisation system.

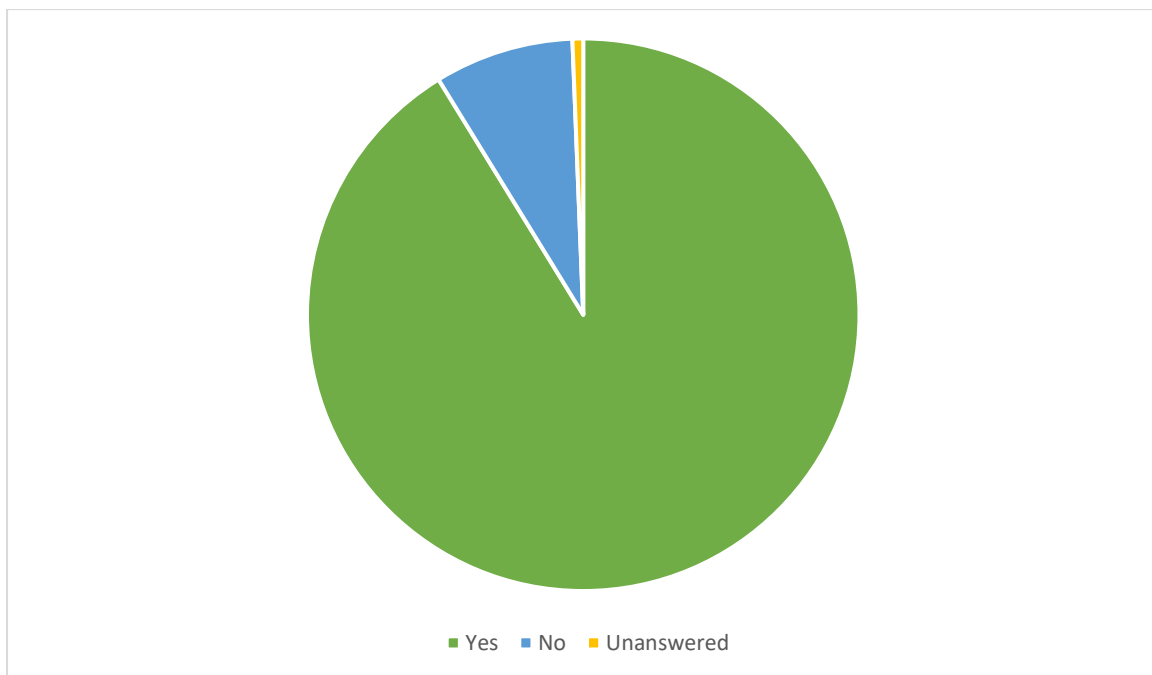
Allocation Policy Review Outcome 11: Retain HA applicants shortlisting with the rest of the General Needs group at Tier 3			
Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
No action required	HA applicants currently shortlisted with the rest of General Needs group	N/A	N/A

Question 12: We may suspend applications where we have sufficient evidence. Examples include antisocial behaviour, abandoning or neglecting previous council tenancies, making false statements, refusing more than two offers of housing without successful appeal. The applicant has the right to appeal to the landlord and they have the right to appeal to the Sheriff Court.

Do you support the suspension of applications for up to a maximum of three years to prevent them from receiving an offer of housing from the date they apply?

Chart 6 illustrates that 91% of respondents supported this proposal with the remaining 9% opting to either vote against it or leave the question unanswered.

**Chart 6:** Do you support the suspension of applications for up to a maximum of three years to prevent them from receiving an offer of housing from the date they apply?



### Recommendation

Based on the level of support from respondents, it is recommended that applications should be suspended for up to a maximum of three years to prevent an offer of housing if the Housing Service has sufficient evidence to support a suspension. The applicant has the right to appeal to Midlothian Council and the Sheriff Court.

Allocation Policy Review Outcome 12: Suspension of housing applications for three years if sufficient evidence			
Action(s) and Commitments for delivery of outcome	Current status	Target/End Point	Who/Co-ordinator
Evidence gathering of inappropriate behaviour to be recorded on One Housing system	Power to suspend not currently utilised	Ongoing on receipt of housing application and relevant evidence	-Housing Officer Team

Question 13: We are currently reviewing our Tenant Participation strategy for 2024-2027. Would you like to hear more about this Strategy?

142 respondents requested further information about the Tenant Participation Strategy 2024-2027. The Housing Team will contact these respondents in due course.

Question 14: Would you be interested in joining in any residents/communities/tenancy participation group(s)?

72 respondents indicated that they would be interested in joining a residents/communities/tenancy participation group. The Housing Team will contact these respondents in due course.

Question 15: Would you like to see any other changes to our allocation policy?

There were 150 responses to this question. Table 7 below contains a balanced range of the comments received.

**Table 7: Would you like to see any other changes to our allocation policy?**

Comment/suggestion
Single people in over 2 beds should have to downsize
I would like if Midlothian council could keep people on the list updated with any further points or changes.
People in flats where circumstances change and they begin to have families should automatically be allocated homes with enclosed gardens shouldn't be expected to carry everything in and out and up multiple stairs so the child can enjoy outdoors
Private let tenants are not there by choice but by necessity. To allocate all new builds to only council tenants who is to say their needs are greater than others. How can anyone become a council tenant if they are constantly passed over for a person/s coming from a different area or housing association and most likely in suitable accommodation

Yes more help for people who are not yet meeting homeless criteria but need to leave there private let
It should be transparent and fair and consistent and not draconian. Tenants should not be penalised for mistakes made in the past . They might just need tenancy support.
One reasonable housing offer (regardless of housing type) to those in genuine need. Far too many people allowed to refuse flats and not have their application marked as having refused an adequate and reasonable housing offer.
Allow people who have part custody of children extra points
I would like more help for anyone in armed forces ,military when either made redundant or leaving active service more help with getting rehoused
The main issue is that the local authorities have not replaced the housing that was sold off during the right to buy scheme. It's hasn't built anywhere near enough social housing. The policy on allowing house building by private companies need's reviewed as they get away with building housing that's too expensive and only supply minimum social rented builds crammed into a small space. Planning applications require to be reviewed and updated in favour of the social renter not the private buyers.
Just build more disabled housing so easier to downsize. Currently in house which 2 large for me and wheelchair user mum.
Mid market letting information easier to follow/apply
More help offered for pregnant women, and people who have been homeless for a lengthy amount of time



## **Midlothian Council Mixed Tenure Strategy**

### **Report by Kevin Anderson, Executive Director Place**

#### **Report for Decision**

#### **1 Recommendations**

In relation to the attached, proposed Mixed Tenure Strategy, Midlothian Council is recommended to:-

- i. Note the continued and rising demand for affordable homes in Midlothian and the disparity between the cost of buying and renting privately and the rents available through homes made available for social rent.
- ii. Support the active promotion of a range of mixed tenures in meeting the need for affordable homes in order to provide more choices to those in housing need and reduce demand for social housing on Midlothian Council's waiting list.
- iii. Approve a range of affordable ownership tenures to be delivered by Registered Social Landlords (RSLs – Housing Associations) and Midlothian Council through Golden Share.
- iv. Note that opportunities for homes to be built and sold through New Supplied Shared Equity scheme by Midlothian Council will be considered in future developments.
- v. Approve the delivery of Mid Market Rent by Midlothian Council through partnerships with RSLs that will ensure preference is given to Midlothian residents who are in housing need.
- vi. Note that further investigation of opportunities to directly deliver Mid Market Rent will be undertaken where this will leverage in alternative sources of finance, e.g. through lease based models, in order to mitigate impact on the General Fund.
- vii. Note that any proposals to directly deliver Mid Market Rent will require the establishment of an arms length organisation, which will require a further report to Council for approval.
- viii. Approve the alignment of relevant planning policy in the emerging Local Development Plan on affordable housing with the recommendations of the Mixed Tenure Strategy, including support for Intermediate Rent in Build to Rent developments.
- ix. Note that Midlothian Council's housing options interviews and information on the Council website will be amended to ensure better awareness of alternative ownership and rental tenures available for those applying to Midlothian Council's social housing waiting list, with service training provided to support this.
- x. On that basis, approve the adoption of the Mixed Tenure Strategy by Midlothian Council.

## **2 Purpose of Report/Executive Summary**

There is rising number of applicants for social housing reflected in the recent 13% increase in the number of households on the Midlothian Council waiting list. However, there is a significant gap between the cost of social housing rent and the cost of owning or renting a home from the private rented sector. This indicates that applicants for social housing may be able to access alternative forms of affordable housing at a cost that is affordable to them.

The approved Local Housing Strategy 2021-26 stated its support for the development of Mid Market Rent (MMR) units and undertaking canvassing through further polling measuring attitudes to MMR and demand in Midlothian. The Mixed Tenures Strategy is the response to this action.

The Mixed Tenure Strategy reviews these alternative affordable tenures and sets out a strategy for increasing their supply in Midlothian to assist meeting housing need. It is proposed that Midlothian Council promotes increased number of homes made available through the Golden Share approach and seeks the delivery of Mid Market Rented homes through partnership agreement with a provider that will prioritise Midlothian residents in their allocation. Midlothian Council will also establish if MMR can be delivered directly through alternative funding arrangements to minimise the impact of these developments on the General Fund, which would have to finance them.

**Date 06/03/2024**

**Report Contact:**

**Fiona Clandillon – Head of Development**  
**Fiona.clandillon@midlothian.gov.uk**



### 3 Background

- 3.1 Housing to 2040 sets out the Scottish Government's ambition to deliver 110,000 affordable homes by 2032. At least 70% of these are to be for social rent with the remaining 30% comprising alternative forms of affordable tenures.
- 3.2 Midlothian's Housing Supply target for the period 2021-2040 requires 412 affordable homes to be delivered annually, of which 279 should be for social rent and the rest (133) as alternative affordable tenures such as MMR and low cost home ownership.
- 3.3 Since 2021, the following homes have been or are planned to be delivered for alternative affordable tenures:

Site	Tenure	No of Homes	Provider	Year of Completion
Eskbank, Dandara	MMR	12	Places for People HA	Scheduled for 24/25
Roslin, Easter Bush, phase 2	MMR	14	Wheatley Homes East HA (Dunedin Canmore)	23/24
Mayfield, Easthouses Road (old school)	MMR	28	Melville HA	Scheduled for 25/26
Shawfair, Avant	MMR	30	Wheatley Homes East HA (Dunedin Canmore)	Scheduled for 26/27
Dalhousie South	MMR	26	Wheatley Homes East HA (Dunedin Canmore)	Scheduled for 27/28
Redheugh, phase 2	MMR	10	Places for People HA	Scheduled for 28/29
Cauldcoats, phase 3	MMR	9	Places for People HA	Scheduled for 28/29
Shawfair, Rettie	MMR	102	Places for People HA	Scheduled for 28/29
Shawfair, Bellway	New Supply Shared Equity	14	Places for People HA	Scheduled for 28/29
Shawfair, Bellway	MMR	30	Places for People HA	Scheduled for 28/29
Shawfair, Woolmet, phase 3	MMR	14	Places for People HA	Scheduled for 27/28

Redheugh, Gorebridge	MMR	10	Places for People HA	Scheduled for 28/29
Cauldcoats, phase 2	MMR	12	Places for People HA	Scheduled for 27/28

- 3.4 Since Midlothian's Housing Supply Target was set in 2021 there have been three Strategic Housing Investment Plans containing the 311 units in the table above. With many of these not due for delivery until 2027/28, this indicates a gap between the target for provision (133 per annum) and projected delivery of alternative tenures. There is scope for the delivery of additional mixed tenure properties.
- 3.5 In addition, with grant funding available to Local Authorities for the direct delivery of MMR, there is also scope for Midlothian Council to consider how to best support more MMR in the local authority area.

#### **4 Mixed Tenure Strategy and Recommendations**

- 4.1 The mixed tenure strategy highlights the continued growth in the waiting list for social housing in Midlothian.
- 4.2 It also highlights the unaffordability of privately renting a home in Midlothian and buying a home in Midlothian (tables 3.3 and 3.5).
- 4.3 However, there is a significant gap between the cost of renting privately and the rent charged by Midlothian Council for its social housing.
- 4.4 This gap indicates that there is a place in the housing market for rents that are higher than social rented accommodation and lower than those being charged by private landlords or the costs associated with a mortgage for an equivalent property.
- 4.5 The strategy highlights that this is supported by research carried out by Rettie & Co on behalf of the Wheatley Group in 2021. This concluded that demand for MMR in particular localities should mirror demand for open market rent, i.e. where there is good demand for open market rent, there is demand for MMR and vice versa. Furthermore, demand for MMR was forecast to be strong across the board and was anticipated to be strongest in areas that also experience good open market rent demand. This is supported by high levels of interest in applicants for social housing in a Mid Market Rent option.
- 4.6 The strategy has reviewed a range of different tenure types for their suitability for promotion and delivery in Midlothian. This includes both affordable ownership models for those who still want to own their homes and rental models. In addition, alternative ways of financing these tenures is considered.

- 4.7 The strategy concludes the following recommendations which we are seeking to implement:

**Recommendation 1**

Enhance range of ownership models supported in Midlothian by the Council and Registered Local Landlords (RSLs). Raise with partners as part of Strategic Housing Investment Plan (SHIP) process and in the scheduled Local Housing Strategy review in 2026/27.

**Recommendation 2**

Promote delivery of 'Golden Share' homes for affordable sale with private developers as way of contributing towards the 25% affordable homes requirement in Midlothian Local Development Plan 2.

**Recommendation 3**

Explore capacity and business case for Midlothian Council to build homes for sale under the New Supply Shared Equity Scheme.

**Recommendation 4**

Deliver Mid-Market Rent (MMR) units within Midlothian Council developments, initially through partnership with RSL. This should only be done where the RSL partner has an allocation policy that aligns with prioritisation of Midlothian residents.

**Recommendation 5**

Continue to explore potential for establishment of Arm's Length External Organisation, if resources allow, for directly delivered MMR homes by Midlothian Council.

**Recommendation 6**

Agree development of a business case by Scottish Futures Trust (SFT), the Scottish Government's Infrastructure agency, in advantage of leveraging in institutional investment for delivery of MMR by Midlothian Council via a potential lease-based model.

**Recommendation 7**

Amend Housing Application form and approach / service training to ensure prospective tenants are made aware of alternative tenures that may provide means to obtain affordable home ownership or rental without becoming tenants of Midlothian Council.

**Recommendation 8**

Update planning policy on Affordable Housing through Local Development Plan review to ensure it is reflective of support for mixed tenure approach to deliver affordable housing.

**Recommendation 9**

Update planning policy on Affordable Housing through Local Development Plan review to support delivery of Intermediate Rent where Build to Rent housing is being delivered in Midlothian, with appropriate mechanisms being put in place for establishing and monitoring discounted rental levels.

## **5 Report Implications (Resource, Digital and Risk)**

### **5.1 Resource**

#### Golden Share

The houses will be built by private developers, with the only involvement of the Council being to provide the application assessments of future potential owners, so there will be no capital cost to the Council associated with this scheme. As the properties are privately owned there will also be no ongoing maintenance costs associated with these properties. The Council is required to be involved in the resale of Golden Share properties.

#### New Supply Shared Equity Scheme (NSSE)

Consider developing a new supply shared equity (NSSE) product. This requires building homes and selling them under a shared equity scheme, with Council taking risk on development and sales. Due to risk, suggest a more cautious approach with the principle approved subject to additional research and further approval of any specific schemes.

As the homes will not be built for the purpose of providing Social Housing the capital cost will need to be met from the General Fund with the capital receipts from the sale of the properties also being credited to the General Fund. If the ongoing management of the scheme cannot be met from existing resource, then there will also potentially be revenue resource required for ongoing management which will require to be met from the General Fund.

#### Local Authority Development of Homes for Sale

The implications will be the same as the New Supply Shared Equity Scheme in the afore mentioned paragraph above.

#### Mid Market Rent (MMR) – Affordable Housing Supply Programme

If Midlothian Council delivered this via a partner which prioritises Midlothian residents then the Council would construct the homes and let them to a designated partner. The capital cost associated with the construction of properties will be part funded by Scottish Government Grant with the remaining cost to be met from General Fund borrowing. As Mid Market rent is non-social housing it would not be feasible for the capital costs to be met from the HRA. There will also be on-going management and maintenance costs associated with the properties which would be mitigated by the rental income received.

### MMR Residential Lease Model

For the lease-based option, Midlothian Council would not own the units outright but would be sub-letting the units and function as head lessor and therefore take ownership of the monitoring and maintenance of these properties. There would be no upfront capital cost and the lease and associated running costs would be chargeable to the General Fund. It is anticipated that the rents received would mitigate the expenditure associated with these properties, although there is an element of risk for void costs which would potentially need to be met from the General Fund.

### Build to Rent and Intermediate Rent

As a third party would build these units and the units would subsequently be managed by private landlords there would be no resource implications to the Council, however 25% of any potential new build development would attract intermediate rent as opposed to social rent.

#### **5.2 Digital**

Midlothian Council officers will use existing digital resources. There are no digital implications.

#### **5.3 Risk**

The principal risks relate to balancing the need to invest in alternative affordable housing tenures whilst still continuing to provide new build social housing.

#### **5.4 Ensuring Equalities (if required a separate IIA must be completed)**

Equality is central to all housing and housing services delivery. An Integrated Impact Assessment (IIA) has been undertaken on the Local Housing Strategy 2021-26 to ensure that the needs of local communities have been fully considered. The SHIP reflects identified needs and draws on findings from the IIA when considering the implications flowing from the translation of strategic aims into housing policies.

### **Additional Report Implications**

### **Appendices**

#### **Appendix A – Report implications**

#### **Appendix B – Mixed Tenure Strategy**

## **APPENDIX A – Report Implications**

### **A.1 Key Priorities within the Single Midlothian Plan**

### **A.2 Key Drivers for Change**

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☒ Sustainable
- ☐ Transformational
- ☐ Preventative
- ☒ Asset-based
- ☒ Continuous Improvement
- ☐ One size fits one
- ☐ None of the above

### **A.3 Key Delivery Streams**

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☒ Preventative and Sustainable
- ☐ Efficient and Modern
- ☒ Innovative and Ambitious
- ☐ None of the above

### **A.4 Delivering Best Value**

The strategy seeks to make best use of alternative sources of finance and minimise impact on the General Services Capital Fund, thus delivering best value for the Council.

### **A.5 Involving Communities and Other Stakeholders**

The Local Housing Strategy has been informed by community consultation and consultation also informed assessment of demand for MMR.

### **A.6 Impact on Performance and Outcomes**

The Mixed Tenure Strategy assists in the delivery of key LHS outcomes relating to mixed tenure.

### **A.7 Adopting a Preventative Approach**

Expanding access to affordable tenures supports a preventative approach for residents in Midlothian.

### **A.8 Supporting Sustainable Development**

Affordable housing in Midlothian is built to a sustainable standard.



## Midlothian Council Mixed Tenure Strategy 2024



## Contents

1	Introduction .....	3
2	Local and National Housing Related Policy .....	3
2.1	Housing to 2040 .....	3
2.2	Strategic Housing Investment Plan (SHIP) .....	3
2.3	Housing Need and Demand Assessment 3 (HNDA 3) .....	3
2.4	Local Housing Strategy 2021-2026.....	4
2.5	Rapid Rehousing Transition Plan (RRTP) .....	4
3	Local Housing Context.....	5
3.1	Housing Tenure in Midlothian .....	5
3.2	Social Housing Demand.....	5
3.3	Affordable Housing Development in Midlothian .....	6
3.4	Midlothian Council Rent Setting Strategy 2023/24 – 2025/26.....	7
3.5	Open Market Purchase Scheme.....	7
3.6	Wheelchair Accessible Housing Targets 2022/23 – 2026/27 .....	7
3.7	Private Rented Sector (PRS) .....	7
3.8	Owner Occupied Housing .....	8
4	Housing Options – Ownership .....	11
	Ownership Options .....	11
4.1	New Supply Shared Equity (NSSE).....	11
4.2	Golden Share.....	14
4.3	Local Authority Development of Homes for Sale.....	15
5	Housing Options – Rental.....	18
5.1	Mid-Market Rent (MMR) .....	18
5.2	Diffley Partnership MMR Survey Report May 2021.....	19
5.3	Bonnyrigg Mid-Market Rental Assessment.....	20
5.4	MMR models.....	21
5.5	Funding MMR.....	22
5.6	Affordable Housing Supply Programme.....	22
5.7	Alternative Funding Models - MMR.....	24
5.8	Build to Rent and Intermediate Rent .....	26
6	Conclusion & Recommendations .....	28



## **1 Introduction**

- 1.1 This Mixed Tenure Strategy aims to highlight the affordable housing options available to Midlothian Council, which have the potential to increase the level of affordable housing outwith the existing new build social housing programme. By increasing the housing options available, Housing Services will be able to direct applicants to a variety of tenures more suitable to differing finances and household circumstances other than the council housing waiting list.

## **2 Local and National Housing Related Policy**

### **2.1 Housing to 2040**

In March 2021, the Scottish Government published its first long-term housing strategy 'Housing to 2040'<sup>1</sup> which set an ambition to deliver a further 110,000 affordable homes by 2032, with at least 70% of these for social rent. Meeting this target is ambitious and will require increased investment by the Scottish Government, Local Authorities and Registered Social Landlords and a step change in the pace of housebuilding in order for it to be achieved. The delivery of more affordable housing remains a high priority for Midlothian Council, which is undertaking a further development programme of 1,000 new council houses in Midlothian. In order to increase the supply of social housing in Midlothian outwith the traditional affordable housing programme and increase the housing options available for waiting list applicants, this strategy will examine the other affordable housing tenure options available.

### **2.2 Strategic Housing Investment Plan (SHIP)**

Midlothian's SHIP is the key document for identifying strategic housing projects towards meeting the Government's 110,000 affordable housing target. This document is updated annually to present up to date information on affordable housing investment plans. The latest SHIP<sup>2</sup> was approved by Council in October 2023 and details the projects either in development or planned by Midlothian Council and Registered Social Landlord (RSL) partners between 2024/25 and 2028/29 and includes potential sites for 2,115 new affordable homes to be built of which:

- 1,885 are general needs homes and 240 are specialist provision homes
- 2,035 will be new build housing and 80 will be Open Market Purchases
- 912 homes will be council housing and 880 will be social rented housing by an RSL
- 14 will be Low Cost Home Ownership – Shared Equity housing by an RSL and 309 will be Mid Market Rent (MMR) housing provided by an RSL.

### **2.3 Housing Need and Demand Assessment 3 (HNDA 3)**

Local authorities are required through legislation to develop a HNDA on a five-yearly cycle, providing an evidence-base for housing policy decisions in Local Housing Strategies and land allocation decisions in Development Plans. The purpose of the HNDA is to estimate the future number of additional housing units to meet existing and future housing need and

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<sup>1</sup> [Housing to 2040 - gov.scot \(www.gov.scot\)](https://www.gov.scot)

<sup>2</sup> [Strategic Housing Investment Plans \(SHIP\) | Strategic Housing Investment Plan 2024/25 - 2028/29 \(midlothian.gov.uk\)](https://midlothian.gov.uk)

demand. Six local authorities came together to produce the South East Scotland HNDAs<sup>3</sup> covering the City of Edinburgh, East Lothian, Fife (West & Central), Midlothian, Scottish Borders and West Lothian. The HNDAs achieved robust and credible status on 28th July 2022 and set Midlothian's Housing Supply Targets for the period 2021 to 2040. Opting for a 'steady growth' scenario set a Midlothian annual housing requirement for 412 affordable housing units of which 279 should be social housing and the remaining 133 should be below market rent.

## 2.4 Local Housing Strategy 2021-2026

The Housing (Scotland) Act 2001 requires local authorities to prepare a Local Housing Strategy (LHS) for their area. The Midlothian Local Housing Strategy 2021 – 2026<sup>4</sup> is the sole strategic document for housing and sets out the key issues to be addressed across all tenures to improve access to housing and housing conditions. Relevant mixed tenure key actions within the LHS include:

- Support the development of Mid-Market Rent units and undertake further polling measuring attitudes to MMR and demand in Midlothian
- Investigate extra provision of specialist housing via remodelling existing provision which could be developed by the public or private sector

It is important to note that as part of the LHS consultation sessions held in Winter 2020/21 Midlothian residents and stakeholders were asked to prioritise key housing issues for the strategy. 72% of respondents wished to prioritise the development of Mid-Market Rent properties.

## 2.5 Rapid Rehousing Transition Plan (RRTP)

The RRTP<sup>5</sup> sets out our strategy for reducing homelessness through the rapid rehousing transition process which prioritises homelessness prevention in the first instance but if it occurs, providing households with appropriate settled housing as quickly as possible. Relevant mixed tenure key outcomes within the RRTP include:

- Achieving a significant increase in the supply of affordable housing is key to providing homeless households, and others in housing need, with a settled housing outcome as soon as possible. The low supply of affordable housing has been the biggest contributor to issues such as the length of time taken to close a homeless case and lengthy periods spent in temporary accommodation.
- Maximising the opportunities to prevent homelessness from occurring, and for homeless households to have access to the widest choice of housing options.

### Housing Statistic

Midlothian's Housing Supply Targets for 2021 to 2040: 412 affordable housing units per annum of which 279 should be social housing and the remaining 133 should be below market rent.

<sup>3</sup> [SES Regional Planning — The Edinburgh and South East Scotland City Region Deal \(esescityregiondeal.org.uk\)](https://www.esescityregiondeal.org.uk)

<sup>4</sup> [Housing strategy and performance documents | Midlothian Local Housing Strategy 2021-2026](#)

<sup>5</sup> [Rapid Rehousing Transition Plans | Rapid Rehousing Transition Plan 2023/24 \(midlothian.gov.uk\)](#)

### 3 Local Housing Context

This chapter examines the current Midlothian housing context including the demand for affordable housing, the supply of affordable housing and a number of housing projects and strategies which seek to increase the number of affordable housing units available and reduce the number of people on housing waiting lists.

#### 3.1 Housing Tenure in Midlothian

The most common housing tenure in Midlothian is owner occupied housing (67%) followed by social rented housing by the council or housing association (24%). In addition, private rented homes comprise 8% of housing tenure<sup>6</sup>.

#### 3.2 Social Housing Demand

An analysis of social housing in Midlothian shows:

- There are 7,272 Council homes in Midlothian<sup>7</sup>. The majority of stock has 2 bedrooms (3,951 units), followed by 3 bedrooms (1,944 units). There are fewer 1-bedroom homes (1,042 units) and properties with four or more bedrooms (335 units).
- There are currently 3,489 RSL properties in Midlothian. Table 3.1 below, shows how many properties each landlord has.
- One- and two-bedroom properties are most in demand on the council housing waiting list; 19% of applicants are waiting for one bed homes, 64% of applicants are waiting for two bed homes, 12% of Housing List applicants require 3-bedroom homes and just 5% need a 4-bedroom home<sup>8</sup>.
- The number of households on Midlothian Council waiting lists has increased from 3930 in 2021 to 4237 in 2022 and to 4468 in 2023. This is an increase of 13.6%.
- The number of homeless applications received by Midlothian Council has risen sharply from 438 in 21/22 to 576 in 22/23 which is an increase of 32%<sup>9</sup>.
- The annual number of homes let by Midlothian Council has increased from 359 in 20/21 to 431 in 21/22 to 475 in 22/23. Leases to new build properties accounted for 108 of this figure which evidences the very low turnover of existing housing stock (5%).

Table 3.1: Number of Registered Social Landlord (RSL) properties in Midlothian<sup>10</sup>

Registered Social Landlord (RSL)	Number of properties
Melville Housing Association	2017
Castle Rock Edinvar Housing Association	1075
Bield Housing Association	116
Dunedin Canmore Housing Association	164
Trust Housing Association	35
Viewpoint Housing Association	34
Blackwood Housing Association	23
Link Housing Association	20
Ark Housing Association	5

<sup>6</sup> [Supporting documents - Scottish Household Survey 2022: Key Findings - gov.scot \(www.gov.scot\)](#)

<sup>7</sup> Internal statistics January 2024

<sup>8</sup> Midlothian Pressure Analysis 2022/23

<sup>9</sup> Midlothian Council HL1 data 2022/23

<sup>10</sup> Scottish Housing Regulator January 2024

### 3.3 Affordable Housing Development in Midlothian

Table 3.2 shows the level of investment in new affordable homes in Midlothian since 2006 (when the Council began building new homes again). It shows that 1,360 council homes have been provided, and a total of 1,861 council and RSL affordable units have been built overall. The investment and supply of new social housing has continued for almost twenty years whilst demand continues to rise. It should be noted that these figures report completions by calendar year up to December 2022 and don't include open market purchases or shared equity purchases.

Table 3.2: New Affordable Housing in Midlothian since 2006<sup>11</sup>

Year of completion	No. of completed Council units	No. of completed RSL units (Social Rent and Mid Market Rent)
2006	0	19
2007	28	12
2008	172	42
2009	237	10
2010	88	20
2011	160	33
2012	170	121
2013	76	6
2014	0	20
2015	48	0
2016	41	28
2017	87	0
2018	0	103
2019	10	39
2020	31	0
2021	90	48
2022	122	0
<b>Total</b>	<b>1360</b>	<b>501</b>

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<sup>11</sup> [Housing statistics quarterly update: new housebuilding and affordable housing supply - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/housing-statistics-quarterly-update/new-housebuilding-and-affordable-housing-supply/pages/11.aspx)

### 3.4 Midlothian Council Rent Setting Strategy 2023/24 – 2025/26

The Rent Setting Strategy<sup>12</sup> introduced a 4.8% rent increase per annum for 2023/24 – 2025/26. This will support current investment in new social housing and existing stock as well as providing additional investment of £77.640 million for a further phase (phase 5) of New Social Housing of approximately 300 properties. Any additional council new build projects which are not currently budgeted for will require additional funding.

### 3.5 Open Market Purchase Scheme

This scheme<sup>13</sup> allows Midlothian Council to purchase ex-local authority properties which were sold under the Right to Buy scheme and return them to council housing stock. This increases the number of council homes by approximately 16 per year.

### 3.6 Wheelchair Accessible Housing Targets 2022/23 – 2026/27

Setting wheelchair accessible housing targets was a required action of the Midlothian Local Housing Strategy 2021 – 2026. In 2022 Midlothian Council set targets to ensure a set number of properties would be built which would 'as a minimum comply with the design criteria indicated as a 'basic' requirement for wheelchair users, as outlined in Housing for Varying Needs (HfVN)<sup>14</sup>. In order to address constraints within the private sector the wheelchair accessible housing target was set over a five-year period; 100 homes will be built between 2022/23 and 2027/28 with 50% to be supplied by both the social and private sectors. This mixed tenure strategy will examine other sources of wheelchair accessible homes outwith the existing council new build programme.

### 3.7 Private Rented Sector (PRS)

In Midlothian only 8% of housing is provided by the private rented sector which is lower than the Scottish average (13%<sup>15</sup>). The Scottish Association of Landlords (SAL)<sup>16</sup> has suggested that the availability of housing in the private rented sector may be declining as an unintended result of the Cost of Living (Tenant Protection) (Scotland) Act 2022 which introduced a temporary rent cap and a temporary moratorium on the enforcement of evictions until March 2024.

Midlothian's proximity to Edinburgh is an issue for the private rented sector; Midlothian is in the same Broad Rental Market Area as Edinburgh and East Lothian and as such has the same Local Housing Allowance (LHA) rates. The Local Housing Allowance sets the maximum weekly Housing Benefit a private tenant can claim and as the LHA rate is the same in Edinburgh and Midlothian, many Midlothian landlords set rent levels which are on par with those in Edinburgh. The average rent in the Lothian Broad Rental Market Area in 2023 was £1,192 per month, the Scottish average was £841.

Table 3.3 below illustrates the average current rent levels in the private sector in Midlothian; a flat with two bedrooms has an average rent of £909 per month whilst a house with three

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<sup>12</sup> [Housing strategy and performance documents | Midlothian Council Rent Setting Strategy 2023/24 - 2025/26](#)

<sup>13</sup> [Open Market Purchase Scheme | Midlothian Council](#)

<sup>14</sup> [Wheelchair accessible housing target: guidance note: MHDGN 201902 - gov.scot \(www.gov.scot\)](#)

<sup>15</sup> [Supporting documents - Scottish Household Survey 2022: Key Findings - gov.scot \(www.gov.scot\)](#)

<sup>16</sup> [Coalition steps up court fight over rent control and eviction ban - Scottish Association of Landlords \(SAL\) \(scottishlandlords.com\)](#)

bedrooms has an average monthly rent of £1360. Overall, the average rent for a private rented sector property in Midlothian is £1245 per month.

Table 3.3: Average PRS Rents in Midlothian<sup>17</sup>

Property type	1 Bedroom	2 Bedrooms	3 Bedrooms	4+ Bedrooms	Average rent
House	N/A	£1055	£1360	£1945	£1453
Flat	£746	£909	£1180	£1318	£1038

This contrasts with the equivalent rent for new Council properties since the 4.8% uplift in rents in 2022, which are as follows:

Table 3.4 Midlothian Council rent new builds

	1 bed	2 bed home	3 bed home	4 or more bed
Average weekly rent (2 bedroom)	£89.12	£102.77	£110.47	£115.76
4 weeks rent	£ 356.48	£ 411.08	£ 441.88	£ 463.04

This highlights a significant rental gap of, for example, circa £500 between the rent for a PRS 2 bed flat and the rent for a 2 bed Council new build.

As a result of low stock numbers and high rent, the Private Rented Sector in Midlothian only supports a small proportion of households to access housing and even lower numbers to help alleviate homelessness adding further pressure onto the demand for affordable housing.

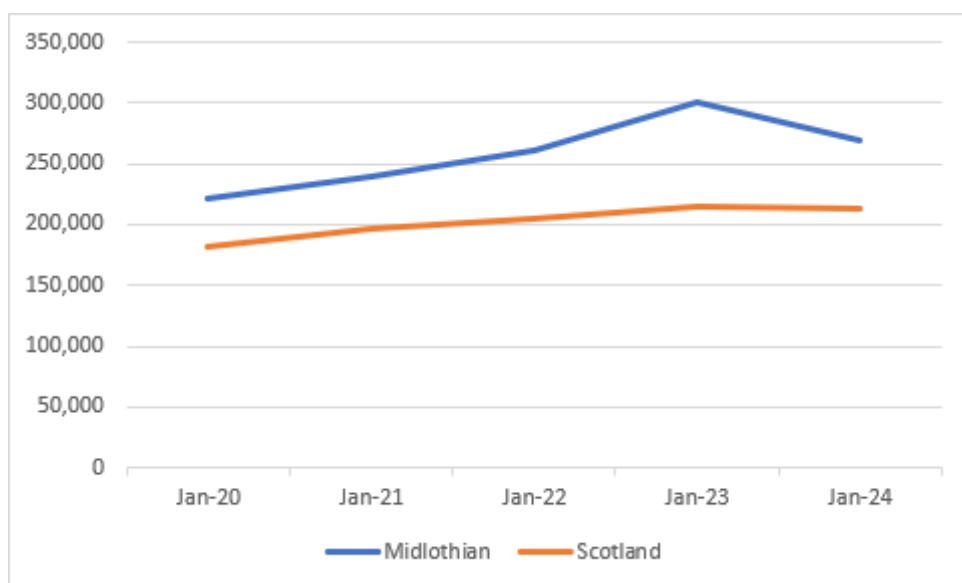
### 3.8 Owner Occupied Housing

In January 2024 the average price of a property in Midlothian was £268,754 whilst the average price in Scotland was £213,446<sup>[1]</sup>. Chart 3.1 below details the average house prices in Midlothian and Scotland between January 2020 and January 2024. It illustrates that prices were generally parallel until January 2022; Midlothian's average house prices were higher but were increasing at a similar ratio to those nationwide. Between January 2022 and January 2023 the average price of a property in Scotland rose by 4%, in Midlothian it rose by 15%. Whilst the average house price in Midlothian has since decreased by 12%, they are still 26% higher than the Scottish average.

<sup>17</sup> Source internal monthly data gathering from Zoopla Jan-December 2023

<sup>[1]</sup> [House price statistics - Registers of Scotland \(ros.gov.uk\)](https://www.ros.gov.uk/house-price-statistics)

Chart 3.1: Average house prices in Midlothian and Scotland



Midlothian's private housing market does not represent an affordable alternative for waiting list applicants. Table 3.4 contains the financial data incurred from purchasing a property at both the average Midlothian house price and a two-bedroom ex council property in Bonnyrigg at home report value <sup>18</sup>and compares this to a gross household income based on a full-time employee who receives the minimum national living wage (£10.42 per hour). It is suggested that when housing costs exceed 30%-35% of a household's income, the cost is judged to be unaffordable.

Mortgages for both properties require a minimum 5% deposit prior to purchase and a £999 product fee and are based on a two year fixed mortgage rate of 5.51%. The former council property would cost £1022 per month which is 61% of the monthly wage whilst the home at the average Midlothian purchase price would cost £1668 per month and therefore more than the monthly wage of someone on the minimum national wage.

<sup>18</sup> [2 bedroom Semi Detached House for sale, Sherwood Terrace, Bonnyrigg, EH19 | £165,000 \(your-move.co.uk\)](https://www.your-move.co.uk) Nov 2023

Table 3.4: Midlothian mortgage affordability calculation

Cost of property	Eligibility deposit required (5%)	Product fee	Monthly repayments	Gross monthly wage	% of monthly wage
£175,000 – 2 bed ex council property in Bonnyrigg	£8750	£999	£1022 <sup>19</sup>	£1667.20	61%
£285,709 – average Midlothian property price	£14,286	£999	£1668	£1667.20	100%

### 3.9 Conclusion

When considering demand for affordable housing in Midlothian, it is clear that despite a strong affordable new build programme from both Midlothian Council and RSLs in the area, demand is far greater than supply.

The private rented sector is small in Midlothian and as a result of low stock numbers and high rent, the Private Rented Sector in Midlothian only supports a small proportion of households to access housing and even lower numbers to help alleviate homelessness adding further pressure onto the demand for affordable housing.

67% of homes in Midlothian are owner occupied. However, it is becoming increasingly difficult to afford a home to buy as prices in Midlothian rise.

There is a significant gap between the cost of renting a home privately or buying a home and the cost of a Council home available for social rent.

The following chapter will explore a spectrum of intermediate housing options which, if made available and accessible to waiting list applicants, could help to alleviate some of the pressure on existing housing stock.

<sup>19</sup> [Halifax Mortgage Calculator - Online Mortgage Rate Calculator](#)



## 4 Housing Options – Ownership

There is a range of alternative options for people unable to access social housing provided by Councils and RSLs. These tenures are still classified as ‘affordable housing’ in the National Planning Framework 4 (NPF4) and include mid-market rented, shared-ownership, shared-equity, housing sold at discount (including plots for self-build), self-build plots and low cost housing without subsidy<sup>20</sup>. Some affordable housing options are for rent whereas some are for home ownership.

Housing Statistic

492 current housing applicants have requested further information on ‘low cost home ownership’ ‘options’ (Nov 2023)

### Ownership Options

#### 4.1 New Supply Shared Equity (NSSE)

The New Supply Shared Equity Scheme is part of the Scottish Government’s Low-cost Initiative for First Time Buyers (LIFT) shared equity scheme and enables first time buyers and priority access groups<sup>21</sup> to buy a new build home from a housing association or council without having to fund its entire cost. Potential buyers pay for the biggest share of equity (usually via a mortgage) and own the property in its entirety. The Scottish Government holds the remaining equity under a shared equity agreement. If the property is sold in the future, the Scottish Government receives the shared equity percentage of the sale value e.g. if the owner owns 70% of the share via mortgage and the Scottish Government holds 30% under a shared equity agreement, the Government will receive 30% of the sale value. The scheme is aimed at households on low to moderate incomes, who can demonstrate they can’t buy a new build house to suit their needs without help from the scheme.

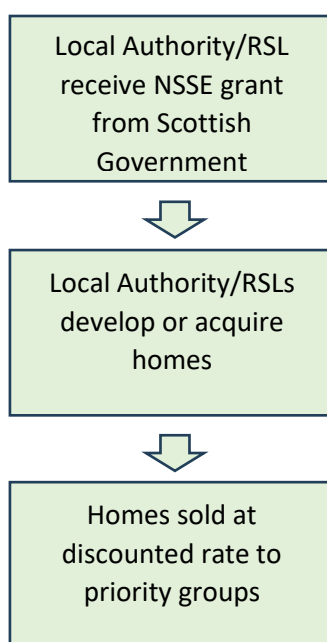
New supply shared equity homes can be built by local authorities or RSLs or purchased by local authorities or RSLs at an appropriate discount from private developers with grant support from the Scottish Government. They can then be made available to aspiring home owners as shown in figure 4.1 below.

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<sup>20</sup> [Annex F – Glossary of definitions - National Planning Framework 4 - gov.scot \(www.gov.scot\)](#)

<sup>21</sup> [New Supply Shared Equity scheme - mygov.scot](#)

**Figure 4.1: New Supply Shared Equity Methodology**



One Registered Social Landlord plans to develop shared equity properties in Midlothian. The most recent Strategic Housing Investment Plan contained details of 14 properties in Shawfair which are scheduled to start on site in 2026/27. Midlothian Council has never opted to build properties for shared equity. Doing so could enable some waiting list applicants and current tenants to purchase shared equity homes, reduce waiting list numbers and in some instances, free up valuable council homes as the following priority groups can apply:

- people aged 60 and over
- social renters (people who rent from the council or a housing association)
- disabled people
- members of the armed forces
- veterans who have left the armed forces within the past two years
- widows, widowers and other partners of service personnel for up to two years after their partner lost their life while serving

A list of current New Supply Shared Equity developments in Scotland can be found here:

[Find a project in your area - mygov.scot](https://mygov.scot)

When building social housing for general rent, the financial process is relatively simple whereas table 4.1 below, illustrates the Scottish Government's shared equity finance model for the housebuilder. Whilst there are no shared equity grant benchmarks (a fixed amount received per new build unit), the table shows how the grant per property is calculated; the total sales income is generated via the shares sold to homeowners, this is deducted from the total project cost and then divided by the number of units built.

**Table 4.1: Scottish Government Shared Equity Finance Model 2023<sup>22</sup>**

Unit type	No. of units	Market value	Total sales value	Assumed tranche sales	Sales income
3 person/ 2 bed house	2	£147,500	£295,000	65%	£191,750
3 person/ 2 bed flat	2	£137,500	£275,000	65%	£178,750
5 person/ 3 bed house	2	£162,500	£325,000	65%	£211,250
Total unit sales	6				£581,750
Total sales value			£895,000		
Total project cost					£880,000
Total grant required					<b>£298,250</b>
Total grant required per unit					£49,708

**Illustration – New Supply Shared Equity**

A couple who live in Midlothian have been on the Council's waiting list for years but have never received an offer of housing. They both work full-time and have a low to medium income but cannot afford to buy a property outright. The couple have heard that a Registered Social Landlord is building homes that will be sold under New Supply Shared Equity arrangement in Midlothian and contact them for further information. They are told that if they qualify, they will be able to purchase between 60-80% of a new home with the remaining percentage of the equity/finance being provided by the Scottish Government. The couple would have complete title to their home and would be responsible for:

- paying the mortgage
- factors costs
- home contents insurance
- building insurance
- repairs and maintenance
- council tax
- heating, lighting and water bills
- fittings and furniture

The couple are aware that if they ever choose to sell the home, the Scottish Government will get a share of the money e.g. if they have a 70% share of the home and decide to sell it, they'll get 70% of the selling price and the Scottish Government will get 30%. The couple can also choose to increase their equity share in their home by 5% increments up to 100%. The couple decide to proceed with their application and provide the Registered Social Landlord with details of their current income, the size of mortgage they are able to afford, how much of a personal contribution they are able to make to the cost (e.g. whether they have saved a deposit) and information about their household and current accommodation. The couple are delighted when their application is successful, they have a mortgage offer in place and are able to submit a successful offer for a new build two bedroom flat in Shawfair.

<sup>22</sup> <https://www.gov.scot/publications/affordable-housing-supply-programme-ahsp-process-and-procedures-mhdgn-2023-01/>

Local authorities that have built and sold new supply shared equity homes highlight the following:

- NSSE only works if the valuation of the properties is comfortably higher than development costs but not too high to ensure that the purchase price remains affordable. In current market, higher development costs make this harder to achieve and therefore more difficult to sell under scheme.
- The current mortgage crisis has seen mortgage rates soar, thus making it harder for many to access an affordable mortgage, even for discounted sale.
- The scheme is very resource intensive so Midlothian Council would require either dedicated officers or an external agency to undertake the management of the project.
- New Supply Shared Equity Homes are not affordable housing in perpetuity as properties can be sold on the open market if the initial applicant decides to move.

#### **Conclusion - New Supply Shared Equity**

- New Supply Shared Equity is a recognised form of affordable housing.
- NSSE should be considered as a viable social housing option when/if both housing materials and labour costs reduce and mortgage interest rates stabilise.
- NSSE would require staff management resources.
- Existing and future NSSE developments in Midlothian should be highlighted during housing options interviews
- Midlothian Council's housing application form should be updated to improve housing options advice (including details of NSSE)
- NSSE may be suitable vehicle to secure delivery of wheelchair accessible homes. Midlothian Council's Wheelchair Accessible Housing Targets, set in 2022, are for 20 wheelchair accessible homes to be built per annum (10 from the social housing sector and 10 for owner occupancy). Of those surveyed, 52% chose 'home ownership' as their preferred housing option.

#### **4.2 Golden Share**

Golden Share is a form of affordable housing similar to New Supply Shared Equity in that a buyer can purchase a percentage (80%) of a new build home if they are unable to afford the full price. Golden Share differs from NSSE as the property is bought directly from a private developer with the Local Authority providing application assessment as there are restrictions on who can apply. Potential buyers must have:

- a local connection to the area
- proof of the number of bedrooms required to prevent overcrowding/underoccupation
- proof that they are unable to finance the purchase at full market value

If the owner decides they wish to sell the property in the future, the sale price is fixed at 80% of the market value at the point of resale. The owners must obtain a Home Report completed by an independent surveyor which must be sent to the Local Authority. The property can then be marketed and must be advertised to the majority of the market. The property cannot be sold for more than the Golden Share resale price. The property will be revalued each time the property is sold. It is important to note that the Local Authority does not assist with mortgage or finance queries, potential buyers are responsible for their mortgage arrangements.

Eight Golden Share properties were marketed at one private developer site in 2023 with Midlothian Council acting as application assessor. Feedback from Midlothian Council staff suggests an easy, straightforward process however the following points were made:

- More notice required from private developer(s) to allow staff time to plan
- Greater staff resources required if the use of Golden Share is to expand
- Potential buyers all wanted to buy properties with more bedrooms than they were entitled to.

It is important to note that Golden Share is an affordable housing option and therefore counts towards the 25% affordable housing contribution on privately owned sites. In practise this will reduce the number of social housing units built.

#### Conclusion – Golden Share

- Golden Share is a recognised form of affordable housing
- Golden Share requires no financial input from Local Authorities
- Golden Share allows some households unlikely to receive an offer of social housing, to step onto the housing ladder thus reducing the demand on the waiting lists.
- The property price is capped at 80% of open market value from the initial sale and for subsequent re-sales, which suggests that it remains affordable in perpetuity.

### 4.3 Local Authority Development of Homes for Sale

In June 2023 the Scottish Futures Trust reported that a number of Scottish Local Authorities have shown interest in developing their own homes for sale<sup>23</sup>. It is important to note that this proposal doesn't refer to a council tenant's capacity to purchase their council home (the 'Right to Buy' scheme ended in Scotland in 2016), this proposal examines a local authority's ability to develop homes for sale on the open market. This differs from the New Supply Shared Equity Scheme (chapter 4.1) as those properties are sold to specific priority groups.

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<sup>23</sup> [Can Local Authorities Deliver Housing for Sale or Market Rent in Scotland? - News - Scottish Futures Trust](#)

The reasons for local authority development are wide ranging but include:

- Depopulation or ageing population – where a local authority is seeking to attract or retain a higher proportion of working age population through the provision of more or better family homes for sale
- Where the nature of the site fails to attract developer interest due to prohibitive cost of enabling infrastructure or remediation required.
- Land in Council ownership – where Councils have control of land but are struggling to attract suitable private sector investment or want a different kind of housing product in a settlement to support regeneration or potentially placemaking and low carbon policies.

Population growth, a high and sustained level of developer activity in Midlothian and a lack of large Council owned site indicate a lack of need for the Council to take on a developer role in delivering homes for undiscounted sale. However, the delivery of specific house types and potential need for homes for discounted sale, as highlighted under NSSE and Golden Share, do indicate where needs may arise.

The legal basis for developing homes for sale on the open market by a local authority is under discussion, however the Scottish Futures Trust cites the local authority statutory power to do “anything which they consider likely to promote or improve the wellbeing of its authority or people within the area”, commonly referred to as the power to advance wellbeing (The Local Government in Scotland Act 2003 part 3).

The ultra vires doctrine restricts local authorities to do only what they are specifically empowered to do. In order to develop homes for sale, a Local Authority must clearly determine why doing so will contribute to the wellbeing of the area and how it will benefit from the regeneration of specific sites. The power to advance wellbeing does not support building homes for sale to generate revenue for cross funding services.

There are very limited circumstances in which Local Authorities can undertake trading operations. Again, Midlothian Council would need to make it clear that the development of homes for sale is driven by regeneration priorities, not from the need to generate an income.

### **Conclusion - Local Authority Homes for Sale**

- Midlothian Council could consider this as a viable housing option only once the legal basis for selling local authority homes has been resolved.
- The provision would have to directly 'advance wellbeing' e.g. Midlothian Council may be able to develop wheelchair accessible homes for sale to address a market failure to deliver these.
- A case would need to be made evidence the justification of developing homes for sale on the open market over other forms of affordable housing. Possible benefits include:
  - Meeting unmet housing requirements
  - Estate regeneration
  - Ability to deliver on sites which are not viable for the private sector

## 5 Housing Options – Rental

### 5.1 Mid-Market Rent (MMR)

Mid-market rent (MMR) is a type of affordable housing with rents being lower than in the private market, but higher than in the social housing sector. MMR aims to help households on modest incomes, who are unable to afford to buy their own home or rent privately but have difficulty accessing social rented housing. Mid-market rent properties are commonly delivered by companies set up by Housing Associations and Local Authorities for this purpose.

MMR is aimed at households who have a consistent income and can sustain a tenancy. Scottish Government guidance states that prospective tenants must not be discriminated against because of the source of income. MMR is not restricted to those in employment.

MMR tenancies are let under a Private Residential Tenancy (PRT) Agreement. A Council or RSL cannot offer a PRT directly. Therefore, they must let homes for MMR via an arms-length external organisation (ALEO).

MMR properties funded by the Scottish Government's Affordable Housing Supply Programme must ensure that the starting rent level for each mid-market rent home (including any service charge) should be no more than the relevant Local Housing Allowance rate for the property size in question<sup>24</sup>. Midlothian is in the same Broad Rental Market Area (BRMA) as Edinburgh and as such has the same Local Housing Allowance rates.

#### Housing Statistic

806 current waiting list applicants have indicated via their housing application forms that they are interested in MMR – November 2023

Table 5.2 below illustrates the weekly rent difference between privately rented properties in Midlothian and the starting rent for MMR properties based on Local Housing Allowance rates if the full BRMA rate is used <sup>25</sup>. A one-bedroom MMR property would have up to 17% lower rents than a privately rented property in Midlothian, two-bedroom properties would have 29% lower rents, three-bedroom properties would have 25% lower rents and properties with four bedrooms would have 4% lower rents.

<sup>24</sup> [Affordable Housing Supply Programme \(AHSP\): process and procedures MHDGN 2023/01 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/affordable-housing-supply-programme-ahsp-2023-2024/pages/1-2.aspx)

<sup>25</sup> [Local Housing Allowance Rates: 2023-2024 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/local-housing-allowance-rates-2023-2024/pages/1-2.aspx)



**Table 5.2: Midlothian PRS rent comparison with Lothian Local Housing Allowance Rates 2023/2024**

Property size	Average weekly Midlothian PRS rent	MMR weekly rent	% difference
Shared accommodation rate	N/A	£94.82	N/A
1 bedroom rate	£186.50	£158.79	- 17%
2 bedroom rate	£245.50	£189.86	- 29%
3 bedroom rate	£317.50	£253.15	- 25%
4 bedroom rate	£407.75	£390.08	- 4%

It should be noted that Local Housing Allowance rates have been frozen since April 2020 with rates set to increase in April 2024<sup>26</sup>. This will increase Housing Benefit and Universal Credit awards and could raise future MMR starting rents. Furthermore, MMR rents are often charged at 80-90% of BRMA rent, with levels varying depending on the economies of individual sites.

## 5.2 Diffley Partnership MMR Survey Report May 2021

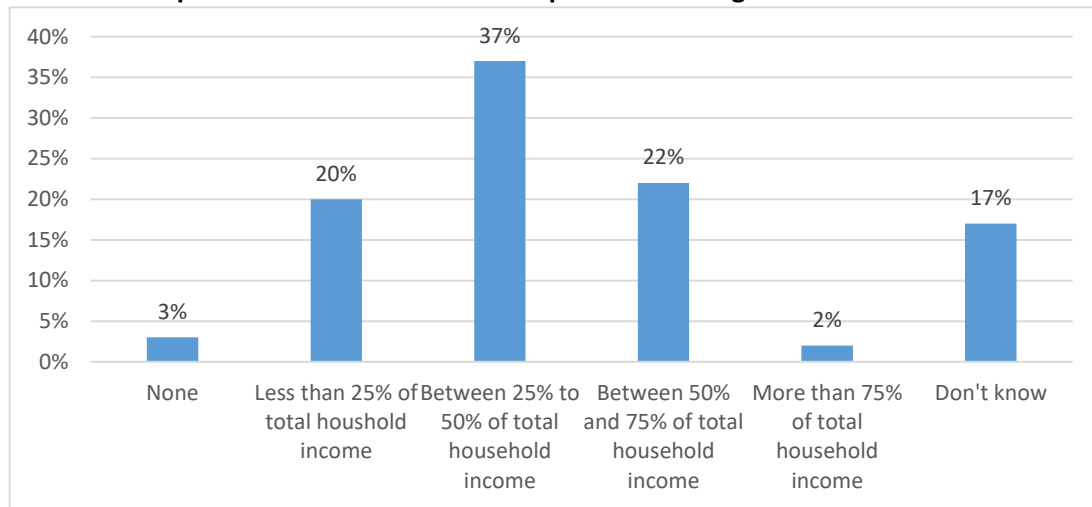
Between April and May 2021, the Diffley Partnership carried out a survey amongst Midlothian waiting list applicants who had previously indicated on their housing application forms that they were interested in Mid-Market Rent properties. A total of 480 questionnaires were issued, 138 were completed in full which resulted in an overall response rate of 29%. Respondents were asked questions relating to the adequacy of their current homes (in terms of size, cost, location etc.), their current tenure (44% of whom rented privately) and their current housing costs. It should be noted that:

- Just under half (47%) of all respondents paid £600 or more on their housing per month
- Over a third (36%) of those who rented their housing paid £700 or more in housing costs per month

Chart 5.1 below shows the proportion of the household income spent on housing costs. Around a quarter (24%) of respondents paid 50% or more of their total household income on housing costs. Over a third of respondents paid between 25% and 50% of their total household income on housing costs. An accepted test of affordability suggests that when housing costs exceed 30%-35% of a household's income, the cost is judged to be unaffordable.

<sup>26</sup> [Local Housing Allowance Rates: 2024-2025 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/local-housing-allowance-rates-2024-2025/pages/12.aspx)

**Chart 5.1: Proportion of household income spent on housing costs**



Respondents were asked whether they would be interested in mid-market rent if Midlothian council or a housing association were to develop more; 96% answered yes. It should be noted that awareness of mid-market rent was found to be limited, with around half of respondents (52%) having a little knowledge of mid-market rent housing, and a third of respondents requiring more information (31%).

### 5.3 Bonnyrigg Mid-Market Rental Assessment

In June 2021, Rettie & Co Consultancy and Research Services was commissioned by Wheatley Group to report on the potential demand for Mid-Market Rent (MMR) properties at a proposed development located in Bonnyrigg.

The resulting assessment reported:

- Demand for MMR in particular localities broadly mirrors demand for open market rent, i.e. where this is good demand for open market rent, there is demand for MMR and vice versa.
- Demand for MMR is forecast to be strong across the board and is anticipated to be strongest in areas that also experience good open market rent demand. While the rental market in Bonnyrigg is relatively compact, the area has seen strong sales demand in recent years and this has put pressure on affordability. The provision of affordable rental units would be anticipated to find demand among residents in this popular location.
- MMR rents at 100% of LHA were expected to be well received by the market based on the area profile and comparable evidence given the site location and product profile. Rettie and Co suggested dropping rents to 90-95% of LHA to ensure demand for properties with four bedrooms as LHA rates were above average PRS rates resulting in higher rent levels for MMR properties than PRS properties. This finding is echoed in table 4.2 which showed only a 4% difference between average Midlothian PRS rent levels in 2023 and predicted MMR rent levels for properties with four or more bedrooms.

#### 5.4 MMR models

There are a number of Registered Social Landlords currently letting mid-market rent homes in Midlothian including Melville Housing Association, Places for People and Dunedin Canmore Housing Association. Each RSL lets their MMR homes in a slightly different way however all require arms-length subsidiary companies to manage their properties:

- Melville Housing Association manage their mid-market homes through Ironmills Developments Ltd (IDL); a non-charitable, subsidiary company owned by Melville. Melville have an MMR waiting list which they use to allocate properties and applicants must have a local connection. In terms of assessing housing need, applicants are checked to see if they are registered on the local authority or Melville housing lists or are current social housing tenants.
- Dunedin Canmore lease their MMR properties via Lowther Homes property management, factoring and letting services. Fourteen new MMR properties were completed in Roslin in 2023 with another 24 planned for Bonnyrigg (scheduled completion in 2027) and 30 in Shawfair (scheduled completion in 2027). It should be noted that the City of Edinburgh Council and East Lothian Housing Association also let their MMR properties via Lowther Homes. Dunedin Canmore let their MMR homes to applicants who work, earn under £40,000, have no priority for social housing, but cannot afford to buy their own home or pay full-market rents.
- Touchstone Property Management manage MMR properties for Places for People. These are advertised via a third party. In May 2023 Places for People owned 109 MMR properties across Midlothian in Shawfair, Bilston and Dalkeith. Future Places for People MMR developments include 12 properties in Dalkeith (scheduled for completion in May 2024) and 12 in Shawfair (scheduled for completion in 2027). Touchstone Property Management confirmed that local connection is not a requirement but is taken into consideration when homes are let.

Some of these MMR properties are advertised openly on websites such as Rightmove. Demand for these homes is high and there is limited prioritisation of local Midlothian residents in housing need when RSLs are letting homes for MMR.

In contrast, East Lothian Council have their own arms-length company to manage their MMR portfolio of 60 MMR properties which are advertised via a third party and priority is given to applicants with a local connection. A further priority group and ranking system is used, and preference is given to:

- Those on Council or Housing Association housing list who have a local connection to the particular housing area.
- Those on Council or Housing Association housing list who have a local connection to East Lothian.
- Potential first-time buyers in employment but unable to secure a mortgage.
- Those currently living in unaffordable private rented housing or with relatives within the East Lothian area.
- Those who have been forced to sell their home due to a change in circumstances (e.g. reduced income) and who cannot obtain a mortgage nor afford private market rents.

MMR properties must be let using a Private Residential Tenancy Agreement. If Midlothian Council were to build mid-market rent properties, Midlothian Council could establish a subsidiary company or employ an existing property management company to acquire these from the Council and let them. An external property management company would likely be required to manage the homes separately from the Council's social rented stock due to differences in how PRT and Assured Tenancies would be managed.

A Local Lettings Initiative or allocation policy for MMR properties could take local factors into account and make best use of stock e.g. by stipulating that applicants have a local connection to the area and have a particular housing need. This would allow MMR homes to be offered to households on Midlothian Council waiting lists for social housing but who can afford to pay a higher rent than that offered by social housing.

#### Melville Housing Association and Ironmills Developments Ltd.

In 2012 Melville Housing Association developed Ironmills Developments Ltd, their own subsidiary company to manage their 11 MMR properties in Mayfield, Midlothian.

Turnover for these properties is extremely low and demand is high; as of December 2023 there were 104 on a closed MMR waiting list. The waiting list was briefly opened between March and May 2023 with 56 new applicants added. Applicants must have a minimum income of around £15,700 and a maximum income of £40,000. Anyone with more than £3,000 in savings is not eligible to apply. Applicants must have a local connection either through work, study, family or culture.

All 11 properties have two bedrooms and the monthly rent is £564.14.

Melville HA is currently developing 28 MMR properties in Mayfield. Completion is scheduled for March 2026.

## 5.5 Funding MMR

### 5.5.1 Affordable Housing Supply Programme

Traditionally mid-market rent properties have been part funded via the Scottish Government's Affordable Housing Supply Programme. Table 5.3 below details the funding available to both Local Authorities and Registered Social Landlords to develop MMR via the Affordable Housing Supply Programme. As a benchmark, Midlothian Council would receive £57,281 per unit for a 2-bedroom property in a city and urban setting.

**Table 5.3: Social Housing Baseline Benchmarks<sup>27</sup>**

Project type	West Highland, Island authorities, and remote/ rural Argyll	Other rural	City and urban
RSL social rent	£111,640 (3 person equivalent)	£97,027 (3 person equivalent)	£91,182 (3 person equivalent)
Council social rent	£97,027 (3 person equivalent)	£88,260 (3 person equivalent)	£83,584 (3 person equivalent)
RSL mid-market rent	£68,387 (3 person equivalent)	£66,049 (3 person equivalent)	£62,542 (3 person equivalent)
Council mid-market rent	£61,957 (3 person equivalent)	£60,204 (3 person equivalent)	£57,281 (3 person equivalent)

In order to complement baseline funding, Midlothian Council could apply for additional quality measure benchmarks as shown in table 5.4 below. If the MMR properties were built with certain improvements (e.g. space for home working or electric vehicle charging points), further funding is available.

Table 5.4: Additional quality measure benchmarks

Additional quality measure benchmarks	Benchmark
Delivering homes to Section 7, Silver Level, of the 2019 Building Regulations in respect of Energy for Space Heating (that is, full Bronze Level plus Aspect 2 of Silver Level). <sup>13</sup>	£2,338 per home (3 person equivalent benchmark)
Provision of balconies within flatted developments to enable people to sit outside, where the provision of private or communal outdoor space cannot otherwise be accommodated.	£4,676 per home (3 person equivalent benchmark)
Provision of space for home working or study – to note that this benchmark does not apply to projects meeting current Housing for Varying Needs standards <sup>14</sup> . In all other circumstances, grant applicants should demonstrate that additional space is necessary to deliver this measure in order for this benchmark to apply i.e. it is not possible to incorporate this within the design of the homes under current space standards. <sup>15</sup>	£4,092 per home (3 person equivalent benchmark)
Digitally-enabling – when a tenant gets the keys to their home they should be able to arrange for an internet connection to 'go live' without the internet service provider having to provide additional cabling to the premises. <sup>16</sup>	£351 per home (3 person equivalent benchmark)
Installation of ducting infrastructure for electric vehicle charge point connectors.	£585 per connector (3 person equivalent benchmark)

Additional quality measure benchmarks	Benchmark
Installation of electric vehicle charge points (excluding installation of ducting infrastructure). <sup>17</sup>	£585 per charge point (3 person equivalent benchmark)
Installation of automatic fire suppression systems.	£3,507 per home (3 person equivalent benchmark)
Installation of heating systems which produce zero direct emissions at the point of use. <sup>18</sup>	£4,676 per home (3 person equivalent benchmark)

The remainder of the cost of building homes for MMR must be borrowed. This cannot be borrowed by the Housing Revenue Account, but by the General Services Capital Fund as the HRA cannot support MMR homes as they are let via a Private Residential Tenancy

<sup>27</sup> [Affordable Housing Supply Programme \(AHSP\): process and procedures MHDGN 2023/01 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/affordable-housing-supply-programme/consultation/2023-01-27/consultation-response/2023-01-27-consultation-response.pdf)

## 5.6 Alternative Funding Models - MMR

### 5.6.1 Affordable Residential Lease Model

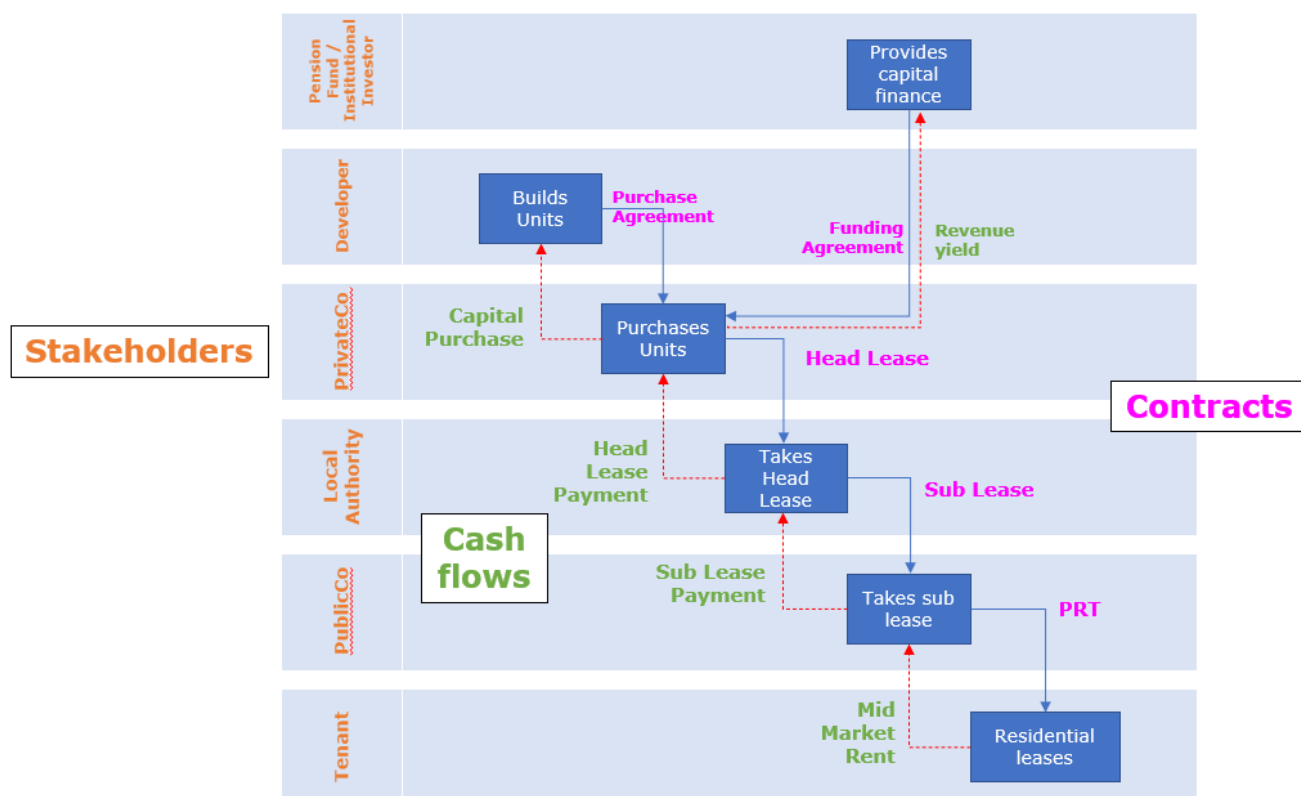
In 2019 the Scottish Futures Trust issued a briefing note to the Association of Local Authority Chief Housing Officers members (ALACHO) on leased mid-market rent schemes; a new funding model which 'delivers MMR units which are managed and maintained by a Local Authority' and 'has the potential to enhance the supply of MMR in a given local authority area without having to have the units funded by Local Authority provided capital resources'. In essence, the Affordable Residential Lease Model aims to create affordable homes without Local Authority investment or funds from the Scottish Government's Affordable Housing Supply Programme:

- Investors (for example pension funds) requiring low risk and low return investments fund private developers to build MMR properties.
- Local Authorities act as guarantor and form external partnerships with the investors who continue to own the homes and receive lease payments for a set period (usually 40 years) from the local authority.
- Local Authorities's MMR ALEO lease the homes and act as landlord and are therefore responsible for sub-letting the homes to tenants, the maintenance of the properties, managing neighbourhood complaints and rent collection.
- At the end of the (say) 40 year lease period, the Local Authority can buy the properties for a nominal sum.

The potential advantage of this model is that the local authority is not required to fund the upfront capital investment and loan charges to develop the homes upfront but pays the cost of the head lease instead. The cost of the head lease should be recouped from letting the homes to tenants for MMR. In the event of voids, the local authority is required to continuing paying the lease costs for these homes.

The Scottish Futures Trust currently chairs the Affordable Residential Lease Model Short Life Working Group which is examining the financial, legal, economic and governance aspects of the model. The group was due to release a report of their findings in late 2023 but this has been delayed. Chart 5.2 illustrates the potential Affordable Residential Model Lease structure.

**Chart 5.2: Potential Residential Lease Model**



The City of Edinburgh Council and East Lothian Council have both taken part in lease based pilots and their feedback would help form a report by SFT which will detail the economic, financial, governance and legal aspects of the model going forward.

### Conclusion – Mid Market Rent

- Mid-market rent (MMR) is a type of affordable housing with rents being lower than in the private market, but higher than in the social housing sector. MMR aims to help households on modest incomes, who have difficulty accessing social rented housing, buying their own home, or renting privately. Given the gap between private sector rent and mortgage costs and social rent in Midlothian, there appears to be scope for this tenure in Midlothian.
- Survey indicate demand for MMR housing in Midlothian. As of November 2023, 806 waiting list applicants have indicated via their housing application forms that they are interested in MMR.
- Midlothian Council is unable to deliver MMR directly. It would require an arm's length subsidiary company to access grant funding and to let the homes via a Private Residential Tenancy Agreement. Midlothian Council could also enter into an agreement with an alternative provider/partner.
- MMR developments are not classified as 'social housing' and therefore borrowing costs cannot be met via the Housing Revenue Account. MMR would therefore need to be financed from borrowing from the General Service Capital Fund.
- There is interest from institutional investors such as pension funds in financing MMR in Scotland however an investment structure would need to be agreed and put in place to facilitate this. Midlothian Council is currently engaging with the Scottish Futures Trust on alternative structures such as lease based models that could attract institutional investment into MMR.

## 5.7 Build to Rent and Intermediate Rent

Build to Rent (BTR) is a relatively new market in Scotland in which homes are built specifically for private rent, rather than for sale, by institutional landlords. Intermediate Rent properties are a form of housing that has been included within Build to Rent developments in Edinburgh in order to meet the requirement to deliver a more affordable tenure within this model. Intermediate rent does not currently meet the definition of affordable homes under current planning legislation<sup>28</sup>.

Build to Rent schemes aims to supply large scale developments that comprise homes for rent which are managed by on site property management teams. These developments tend to come forward in areas where there are strong public transports links to employment centres and easy access to facilities for tenants. Some recent examples of BTR developments are:

- Dockside, Leith (280 Build to Rent, 93 Intermediate Rent units)
- New Town Quarter, Edinburgh (210 Build to Rent, 108 Intermediate Rent units)
- New Fountainbridge, Edinburgh (189 Build to Rent, 64 Intermediate Rent units)

There are currently 11,674 Build to Rent and Intermediate Rent properties in Scotland<sup>29</sup> (March 2024) either in the planning process, under construction or in operation. None are

<sup>28</sup> [Annex F – Glossary of definitions - National Planning Framework 4 - gov.scot \(www.gov.scot\)](#)

<sup>29</sup> [Build to Rent Pipeline in Scotland | Scarlett Land and Development \(scarlettdev.co.uk\)](#)



currently in operation in Midlothian, however some queries have been made about delivering BTR in Shawfair.

BTR seeks to offer good quality, well managed developments as an alternative to the traditional PRS sector. They are managed by a single landlord. The rental model is not compatible with the approach of an RSL or Local Authority taking ownership of up to 25% of homes for affordable let therefore, the intermediate rental model has evolved in Edinburgh to ensure a form of affordable homes are provided by this model.

Intermediate Rent is unsubsidised private rented housing, provided to tenants at rents below private rent levels. Intermediate Rent is seen as a viable option in Build to Rent neighbourhoods to accommodate the required affordable housing contribution (usually 25% of private developments). Intermediate Rent developments differ from traditional affordable housing developments in that they:

- Are owned by an investor, not by a Registered Social Landlord or Local Authority
- Do not require Scottish Government Affordable Housing Supply grant as they are homes where a discounted rent is charged by their a landlord without subsidy being provided.
- The properties do not currently qualify as affordable housing. The City of Edinburgh Council altered the definition of the Affordable Housing requirement for any residential scheme in Edinburgh and introduced a policy to accept these in lieu of affordable housing contribution.
- Rental levels are set using Local Housing Allowance (LHA) rates. These are higher than social housing rent levels but lower than private rent levels.
- Most Intermediate Rent properties revert to private tenure after 25 years

#### Conclusion – Build to Rent/Intermediate Rent

- In Edinburgh Intermediate Rent provides homes for a discounted, more affordable cost within Build to Rent developments, with up to 25% of any potential new build BTR development attracting intermediate rent as opposed to social rent.
- As a third party would build these units and the units would subsequently be managed by private landlords there is no resource implication to the Council.
- Intermediate Rent property rental levels are set using Local Housing Allowance Rates
- Intermediate Rent and Build to Rent developments are funded by investors, no grants are required.
- There are no Build to Rent developments in Midlothian however it has been proposed in potential BRT developments in Shawfair.

## **6 Conclusion & Recommendations**

Midlothian Council's new build housing programme faces challenges including rising material and labour costs, a lack of council owned sites, the rising cost of affordable housing provision within private developments, reduction in Scottish Government grant availability in the coming years and uncertainty around resource planning assumptions in 2025/26.

In addition, Midlothian Council has a rising demand for affordable housing, rising costs associated with renting privately or purchasing a home and a lack of private rented sector properties. This context necessitates a review of the additional mixed tenure options that are and could be made available to those in housing need in Midlothian other than social housing.

Additional tenure options are available in both the private and public housing sectors. Expanding delivery of these will provide alternative housing solutions suitable for differing finances and household circumstances other than the council housing waiting list. This can be reflected at housing options interviews and online resources.

Midlothian Council continues to have a strong social housing building programme and the continuation of this alongside the expansion of the affordable housing options within this strategy have the potential to maximise the provision of affordable housing tenures in Midlothian.

### **Recommendation 1**

Enhance range of ownership models supported in Midlothian by the Council and Registered Local Landlords (RSLs). Raise with partners as part of Strategic Housing Investment Plan (SHIP) process and in the scheduled Local Housing Strategy review in 2026/27.

### **Recommendation 2**

Promote delivery of 'Golden Share' homes for affordable sale with private developers as way of contributing towards the 25% affordable homes requirement in Midlothian Local Development Plan 2.

### **Recommendation 3**

Explore capacity and business case for Midlothian Council to build homes for sale under the New Supply Shared Equity Scheme.

### **Recommendation 4**

Deliver Mid-Market Rent (MMR) units within Midlothian Council developments, initially through partnership with RSL. This should only be done where the RSL partner has an allocation policy that aligns with prioritisation of Midlothian residents.

### **Recommendation 5**

Continue to explore potential for establishment of Arm's Length External Organisation, if resources allow, for directly delivered MMR homes by Midlothian Council.

### **Recommendation 6**

Agree development of a business case by Scottish Futures Trust (SFT), the Scottish Government's Infrastructure agency, in advantage of leveraging in institutional investment for delivery of MMR by Midlothian Council via a potential lease-based model.

**Recommendation 7**

Amend Housing Application form and approach / service training to ensure prospective tenants are made aware of alternative tenures that may provide means to obtain affordable home ownership or rental without becoming tenants of Midlothian Council.

**Recommendation 8**

Update planning policy on Affordable Housing through Local Development Plan review to ensure it is reflective of support for mixed tenure approach to deliver affordable housing.

**Recommendation 9**

Update planning policy on Affordable Housing through Local Development Plan review to support delivery of Intermediate Rent where Build to Rent housing is being delivered in Midlothian, with appropriate mechanisms being put in place for establishing and monitoring discounted rental levels.



## **Midlothian Local Transport Strategy (LTS) – ‘Case for Change’ survey**

**Report by Anna Herriman, Strategic Transport Planning Manager**

### **Report for Decision**

## **1 Recommendations**

1.1 It is recommended that Council:

- a) Agrees to a six-week long public survey commencing in April 2024, to help conclude Stages one and two (referred to as the ‘Case for Change’ stage) of the Local Transport Strategy (LTS), and
- b) Notes that the results of the survey will be used to help finalise the Stages one and two report and help inform the development of ‘options’ for the final Local Transport Strategy document, also
- c) Notes that a fuller 12-week long public consultation exercise will be held over July, August, and September, on the draft final Local Transport Strategy.

## **2 Purpose of Report/Executive Summary**

This report informs Council of the policy context guiding the development of a new Midlothian Local Transport Strategy (LTS) and seeks agreement to commence a short survey in April. This is needed to help ensure transport problems are fully identified, and thus conclude the early stages of the LTS development.

The report explains the role and purpose of the LTS in Midlothian, in helping shape future transport related decisions, in a period of rapid growth.

The report outlines the stages of preparing the LTS – which follows Transport Scotland’s 2023 guidance on local transport strategies. Stages One and Two (referred to often as Case for Change Stage) will be concluded after the short survey, before developing options and then drafting of a new LTS.

**Date:** 24/02/2024

**Report Contact:**

Anna Herriman, Strategic Transport Planning Manager

[anna.herriman@midlothian.gov.uk](mailto:anna.herriman@midlothian.gov.uk)

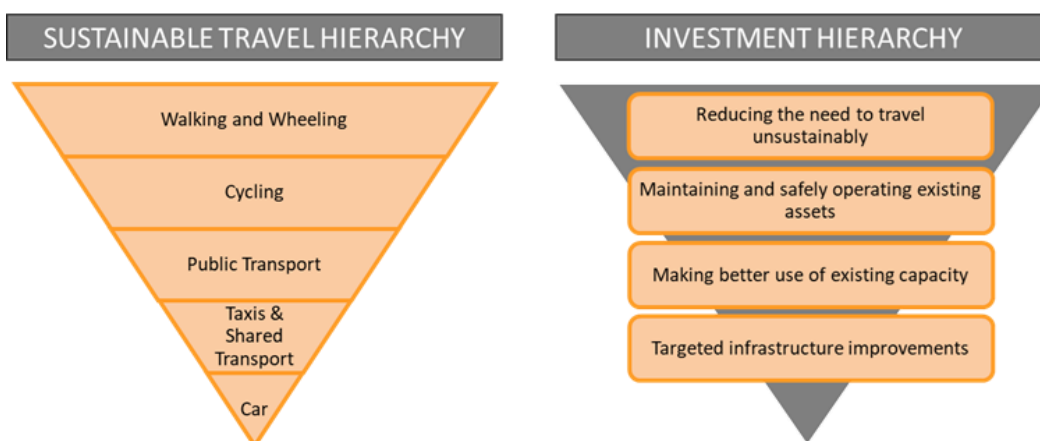
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## Background

### Strategic Context

- 3.1** There has been a distinct shift in national transport and planning policy, legislation, and funding towards the delivery of a more sustainable and equitable transport future in Scotland. This requires co-ordinated delivery at all levels of government. Current National and Regional Strategies seek to address a lack of access to the transport network (a major barrier to financial, social inclusion) and promote sustainable transport options that are accessible, safe, and help reduce car dependency. Appendix 1 sets out policies that relate to a new Midlothian LTS.
- 3.2** The [Climate Change \(Emissions Reduction Targets\) \(Scotland\) Act 2019](#) established Scotland's emissions reduction target of net zero by 2045 which applies to all levels of government. The [Climate Change Plan \(Update\) 2020](#) set an interim target of a 20% reduction in car kilometres by 2030. The Transport (Scotland) Act 2019 has introduced new powers for local government, in relation to decriminalisation of certain parking infringements, and in relation to provision of local bus services to try and stem a decline in bus use.
- 3.3** The [National Transport Strategy \(NTS2\)](#), published in 2020, set out four holistic priorities for transport action – reduce inequalities; take climate action; support inclusive economic growth and improve health and well-being. These are aligned closely to the policies within the [National Planning Framework 4 \(NPF4\)](#). More pertinently, with regards to transport funding, NTS2 also introduced new hierarchies that guide investment in transport interventions and infrastructure at all levels, as follows:

Figure 1: Sustainable Travel and Investment Hierarchies of NTS2



- 3.4** Transport Scotland's draft [guidance for the development of local transport strategies](#), produced in March 2023, emphasises the need to align with wider policy landscape and integrate transport and land use planning at the local level. It sets out a five stage LTS development process.

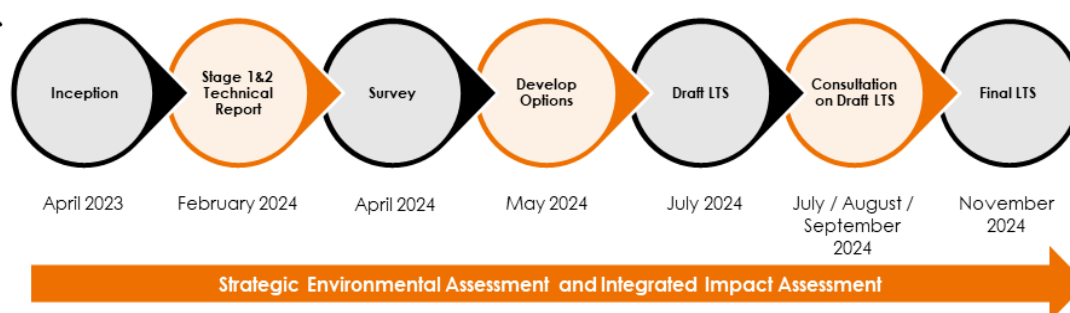
## Rationale for a new Midlothian LTS

- 3.5** A Local Transport Strategy (LTS) is needed to provide a framework for delivering sustainable transport options in Midlothian. As the fastest growing Scottish local authority, with extraordinary population growth in the last decade, and similar levels expected going forward, Midlothian faces a unique and urgent set of transport pressures. These mainly derive from new areas of housing exerting new demands onto the existing, constrained network, but the impacts of trunk roads on local and cross boundary journeys, and gaps in public transport provision are also creating significant and unique pressures.
- 3.6** The most recent LTS for Midlothian expired in 2010, therefore, a strategic view of local transport priorities is now needed. The new LTS will identify opportunities to integrate sustainable travel with land use planning and highlight where transport interventions can support high quality places and support the new Local Development Plan (MLDP2). Additionally, the LTS will identify opportunities to work collaboratively with other Councils and partners on transport challenges that affect travel and logistics across the entire region.
- 3.7** Whilst an LTS isn't a statutory requirement, there are certain discretionary powers that a Council may only exercise if it has an LTS that supports such activities, including using bus powers available from the Transport (Scotland) Act 2019 – for example, running bus services to better meet the needs of the area to complement and improve access to the wider public transport network.
- 3.8** The LTS will also support proposals to attract investment from Scottish or UK Governments or other funders. It will help guide agreements on developer contributions by evidencing the need for appraised transport interventions. Ultimately, the LTS will help direct resource towards delivery of policies and transport solutions that contribute to the outcomes and vision of the [Midlothian Single Plan](#).

## Process of developing the new LTS

- 3.9** The LTS is being developed by consultants, Stantec, on behalf of the Council. The process for Midlothian underway follows the approach outlined in Transport Scotland's 2023 guidance on Local Transport Strategies, as follows:

Figure 2: Midlothian LTS Development Process



- 3.10** In parallel with the development of the LTS, a Midlothian Council Integrated Impact Assessment is being carried out. Additionally, the required multi-stage Strategic Environmental Assessment (SEA) is being undertaken in accordance with the Environmental Assessment (Scotland) Act (2005).
- 3.11** Stantec has now produced a draft Stage 1 and 2 Technical Report (Appendix C) which gives detailed analysis of all available evidence around the challenges of moving people and goods in and through Midlothian and uses this evidence to identify transport challenges (problems) for people who live in Midlothian's settlements as well as a set of draft outcomes, that explain what the LTS will seek to achieve. As not all the available data is recent, with some dating back to Census 2011, there is a need to conduct a short survey to ensure all current transport problems are identified.

**Public survey at Stage 1 and 2 – Survey of transport problems (or opportunities)**

- 3.12** The proposed survey will help conclude the first two stages of the LTS. The purpose is to ensure the full range of transport problems and constraints relating to the transport system in Midlothian are captured, and to gather public view on these and early-stage transport planning objectives. It should be noted that problems may sometimes be expressed as opportunities. The input of key stakeholder organisations (including Transport Scotland, SEStran or neighbouring Councils) is necessary at this early stage, to ensure good alignment of the emerging LTS with neighbouring plans.
- 3.13** As the public are invited to take part in the Stage 1 and 2 Survey, it will be available both online and in libraries, and it will be easy to use, provided in clear and simple, non-technical language. All the information needed to take part will be provided as part of the survey, with easy-to-understand summary information from the technical report provided. However, if any partner organisation, transport provider or member of the public wishes to review the Stage 1 and 2 Technical Report in more detail, a link to it (and a hard copy in libraries) will be provided. The survey period will run for 6 weeks.
- 3.14** Given that settlements can face quite local challenges, the Survey will ensure all communities are able to feed in locally specific issues as well as general concerns. The Survey will be available online through the Council's consultation hub, as well as through printed out hard copies in each community library. Once the survey is complete and findings analysed, the 'Case for Change' stage of the LTS will be concluded, and 'options' (solutions to problems) will be developed
- 3.15** Later in 2024, when the final Local Transport Strategy has been drafted, a 12-week long public consultation exercise will take place. This longer public consultation gives people the opportunity to consider the options or policies which are proposed to address Midlothian's transport issues, as well as allowing sufficient time for members of the public, community councils and local groups to consider the LTS document and comment on it.
- 3.16** There is some unavoidable overlap with the consultation period for "On the Move Midlothian: Active Travel Strategy". During that time, a note on both surveys will make clear that there is an interrelationship between surveys, but



that each has a different focus. Officers are finalising survey questions to ensure both exercises are complementary and to avoid duplication. An addition to the privacy notice within both exercises will confirm that completely anonymised responses will be shared with other transport strategies and work under development, to help avoid duplication and consultation fatigue. Data protection guidance has been sought on this matter.

## **4 Report Implications (Resource, Digital and Risk)**

### **4.1 Resource**

As reported to Council on 28 June 2022, a budget of £92,500 was agreed within the Place Directorate; and Stantec were appointed in September 2022 to develop the LTS at a final cost of £91,612.50. The contract with Stantec includes carrying out consultations; this includes preparation of online survey materials, analysis of survey responses and completion of the final stages of the LTS.

### **4.2 Digital**

The Survey will be available from the Council's consultation hub.

### **4.3 Risk**

Because the Technical Report is heavily data and analysis-led, summary information will be provided as part of the survey, and language in the questions will be more simply phrased. An 'any other issues' question field will be provided – should this elicit operational concerns, these will be shared with relevant colleagues.

### **4.4 Ensuring Equalities (if required a separate IIA must be completed)**

An ongoing integrated impact assessment is underway recognising that a lack of transport, or the way it is provided, can disproportionately affect people with one or more protected characteristic. The IIA Scoping and Evaluation Materials will be available for inspection once a draft LTS is available later this year.

### **4.5 Additional Considerations**

Whilst not a direct consequence of this report, or equalities considerations, it should be noted that relative transport poverty is an issue across Midlothian, deriving from factors, of a combination of factors, such as: -

- remoteness
- lack of access to the transport network
- disability or other protected characteristics
- household income,
- car dependency
- type of employment (frontline, shift work, for example)

For some people, driving, or taxi use is unavoidable and is the only practical means of travel due to lack of public transport or other options, despite the

high costs. Remoteness or topographic barriers that exist in Midlothian can intensify a lack of transport equity. For example, concessionary travel – a bus pass - is only beneficial if there is a regular bus service, or you can get to it.

## **Appendices**

**Appendix A – Additional Report Implications**

**Appendix B – Local Transport Strategy - Strategic Landscape**

**Appendix C – Midlothian Stages 1 and 2 Technical Report (Draft)**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

The completion of the LTS will confirm priority projects that can attract funds to Midlothian, to deliver **safe** routes that support physical activity – supporting a preventative approach to **healthy** individuals and a **well-being economy**.

The LTS will focus on access for all transport users, helping improve **access to work** for those that can't afford a car, supporting **employability**, **connectivity** and **reducing poverty**. Increasing sustainable travel options for individuals and communities reduces levels of car dependency and road congestion, this has significant **health and environmental benefits**, and supports a **greener** Midlothian.

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- ☒ Modern
- ☒ Sustainable
- ☒ Transformational
- ☐ Preventative
- ☒ Asset-based
- ☒ Continuous Improvement
- ☐ One size fits one
- ☐ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☒ Preventative and Sustainable
- ☐ Efficient and Modern
- ☒ Innovative and Ambitious
- ☐ None of the above

### A.4 Delivering Best Value

The report does not directly impact on Delivering Best Value

### A.5 Involving Communities and Other Stakeholders

The creation of the STPO post will help involve relevant community groups and interested stakeholders in key projects and strategies.

### A.6 Impact on Performance and Outcomes

The report contributes to a wide range of policy outcomes, outlined in A.1

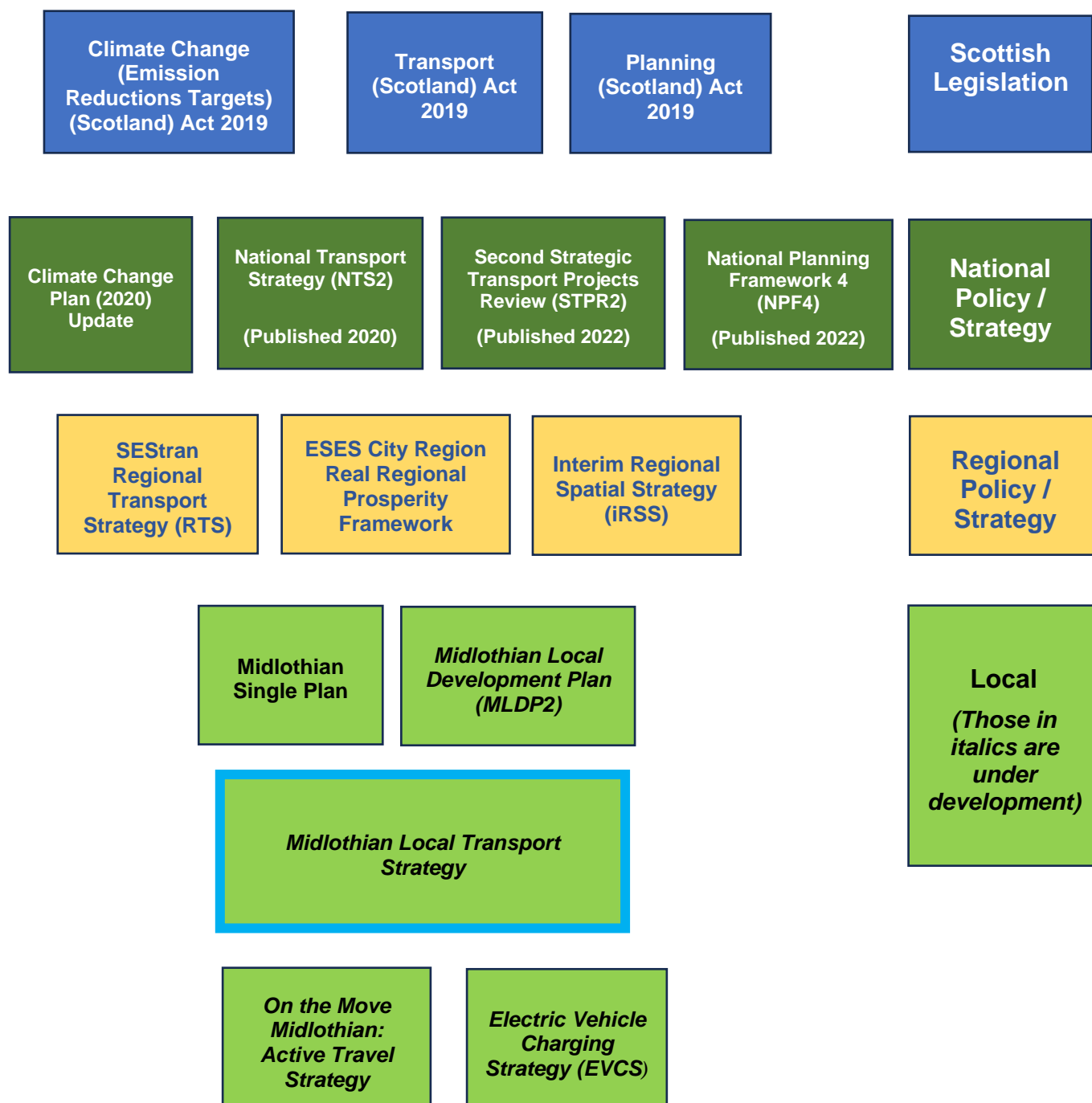
### A.7 Adopting a Preventative Approach

Not applicable to the content of this report.

### A.8 Supporting Sustainable Development

The LTS is intrinsically linked with the development of MLDP2 and focussed on sustainable development.

## APPENDIX B –Local Transport Strategy – Strategic Landscape



# Midlothian Local Transport Strategy:

**Draft Stage 1&2 Technical Report**

February 2024

In partnership with:





# Document Control Sheet

**Project Name:** Midlothian Local Transport Strategy

**Project Ref:** 332610018

**Report Title:** Draft Stage 1&2 Technical Report

**Date:** February 2024

Client and disclaims all liability of any nature whatsoever to any such party in respect of this report.

	Name	Position	Signature	Date
Prepared by:	Rachel Thomas	Associate Transport Planner	RMT	12/10/23
Reviewed by:	Rachel Thomas	Associate Transport Planner	RMT	12/10/23
Approved by:	Scott Leitham	Director of Transport Planning	SL	12/10/23
For and on behalf of Stantec UK Limited				

Revision	Date	Description	Prepared	Reviewed	Approved
v2.0	27/02/24	Update following comments	RMT	SL	SL

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## Contents

<b>1</b>	<b>Introduction.....</b>	<b>6</b>
1.1	Purpose .....	6
1.2	Why is a new Local Transport Strategy for Midlothian needed? .....	7
1.3	This Report .....	7
<b>2</b>	<b>Policy Review.....</b>	<b>8</b>
2.1	Overview.....	8
2.2	National Policy .....	8
2.3	Regional Policy .....	13
2.4	Local Policy .....	15
<b>3</b>	<b>Local Authority Profile .....</b>	<b>18</b>
3.1	Overview.....	18
3.2	Socio-economic profile .....	18
3.3	Planning for the future .....	28
<b>4</b>	<b>Approach to Identifying Transport Problems and Opportunities in Midlothian.....</b>	<b>33</b>
4.1	Problem Identification .....	33
<b>5</b>	<b>Active Travel .....</b>	<b>35</b>
5.1	Active travel provision .....	35
5.2	Active travel demand .....	37
5.3	Active travel collisions .....	40
5.4	Findings from previous public engagement activities.....	43
5.5	Problems Around Walking, Wheeling and Cycling in Midlothian .....	46
<b>6</b>	<b>Public Transport .....</b>	<b>50</b>
6.1	Connectivity analysis .....	50
6.2	Bus .....	57
6.3	Findings from previous public engagement activities .....	76
6.4	Problems Around Bus Travel in Midlothian .....	78
6.5	Rail .....	82
6.6	Findings from previous public engagement activities .....	86
6.7	Potential Problems Around Rail Travel in Midlothian .....	88
<b>7</b>	<b>Road.....</b>	<b>90</b>
7.1	Road network .....	90
7.2	Speed limits .....	92
7.3	Traffic volumes .....	92
7.4	Journey time reliability .....	95
7.5	Road Collisions .....	99
7.6	Parking .....	99
7.7	Electric Vehicle Charging .....	103
7.8	Car Pooling and Car Sharing .....	105
7.9	Findings from previous public engagement activities .....	105
7.10	Potential Problems Around Road-Based Travel in Midlothian .....	107
<b>8</b>	<b>Strategy Outcomes .....</b>	<b>109</b>
8.1	Overview .....	109
8.2	Local Transport Strategy Outcomes .....	110
8.3	Summary .....	115
<b>9</b>	<b>Next Steps.....</b>	<b>118</b>
9.1	Overview .....	118



## Figures

Figure 2-1: Sustainable Travel Hierarchy and Investment Hierarchy .....	8
Figure 3-1: Midlothian populations 2000 - 2021 (Source: NRS mid-year population estimates 2021) .....	18
Figure 3-2: Age breakdown (Source: 2021 Mid-year population statistics, NRS) .....	19
Figure 3-3: New build completion rates per 10,000 population by local authority area (Source: Scottish Government Housing Statistics) .....	20
Figure 3-4: Population Projections 2018 - 2043 (Source: NRS, Population Projections for Scottish Areas (2018 Based)) (2018 = 100) .....	20
Figure 3-5: Population Estimates - Change in Age Group 2018 - 2038 (Source: NRS, Population Projections for Scottish Areas (2018 Based) ...	20
Figure 3-6: Number of cars available for private use by household (Scottish Household Survey Travel Diary, 2021) .....	21
Figure 3-7: Midlothian Deprivation Decile Ranking (Source: Scottish Index of Multiple Deprivation 2020) .....	22
Figure 3-8: Economic Activity Rate (Source: Office National Statistics Annual Population Survey, 2022) .....	23
Figure 3-9: Workplace location of residents of Midlothian by area (Source: Census 2011) .....	23
Figure 3-10: Method of travel to work of people residing in Midlothian by location (Source: Census 2011) .....	24
Figure 3-11: Percentage of employed adults in the Lothians who work in the Lothians and other council areas (2015-2019 combined) .....	25
Figure 3-12: Percentage Employee Jobs by Industry 2021 (Source: BRES 2021) .....	27
Figure 3-13: Midlothian Strategy for Development (Source: 2017 Midlothian Local Development Plan) .....	29
Figure 3-14: Location of Midlothian's housing sites (Source: Midlothian Housing Land Audit 2023) .....	29
Figure 3-15: Location of Midlothian's employment sites (Source: Midlothian Employment Land Audit 2023) .....	31
Figure 5-1: Midlothian existing active travel network .....	36
Figure 5-3: Age profile of Strava users in Midlothian (2023) .....	38
Figure 5-4: Split between rides undertaken on e-bikes and those undertaken on standard bikes - 2019 to 2023 .....	39
Figure 5-5: Strava Metro Heat Map - Cycling .....	39

Figure 5-6: Strava Metro Heat Map – walking / running / hiking .....	40
Figure 5-7: Collisions involving pedestrians between 2013 and 2022 by casualty severity .....	41
Figure 5-8: Collisions involving cyclists between 2013 and 2022 by casualty severity .....	42
Figure 5-9: Satisfaction with walking prior to the Pandemic (n=330) (Source: SEStran Regional Transport Strategy Public Survey 2021) .....	43
Figure 5-10: Satisfaction with cycling prior to the Pandemic (n=330) (Source: SEStran Regional Transport Strategy Public Survey 2021) .....	43
Figure 6-1: Connectivity to Edinburgh City Centre (Princes Street) .....	51
Figure 6-2: Connectivity from postcodes in Midlothian to Employment in Midlothian and the surrounding area .....	52
Figure 6-3: Connectivity from postcodes in Midlothian to Employment in Midlothian only .....	53
Figure 6-4: Connectivity to employment destinations .....	55
Figure 6-5: Connectivity to Education .....	56
Figure 6-6: Lothian Bus network map showing Lothian Buses and East Coast Buses which serve Midlothian (Source: Lothian Buses) .....	59
Figure 6-7: Borders Bus network map showing Border Buses bus services which serve Midlothian (Source: Borders Buses) .....	60
Figure 6-9: Postcodes with or without convenient access to a bus stop ...	65
Figure 6-10: Frequency of bus services by road corridor – Weekday 0500-2359 .....	67
Figure 6-11: Frequency of bus services by stop - Weekday 0500-2359 ...	67
Figure 6-12: Percentage of households in Midlothian as a whole with defined bus frequencies .....	68
Figure 6-13: Percentage of households in with defined bus frequencies by locality .....	69
Figure 6-14: First Bus Service for each Bus Stop within Midlothian .....	74
Figure 6-15: Last Bus Service for each Bus Stop within Midlothian .....	75
Figure 6-16: Satisfaction with the bus prior to the Pandemic (n=237) (Source: SEStran Regional Transport Strategy Public Survey 2021) .....	76
Figure 6-17: Midlothian Rail Network .....	82
Figure 6-18: Passenger entries and exits by station 2015/16 – 2021/22 (Office of Road and Rail, 2022) .....	85
Figure 6-19: Satisfaction with the train prior to the Pandemic (n=131) (Source: SEStran Regional Transport Strategy Public Survey 2021) .....	87
Figure 7-1: Midlothian A and B Road Overview .....	91





Figure 7-2: Motorised traffic in Midlothian between 2000 and 2021 (Scottish Transport Statistics).....	93
Figure 7-3: 2022 AADT Counts on key routes .....	94
Figure 7-4: Road Corridors for which INRIX journey time data was reviewed	95
Table 7-1: Journey time variability for key road corridors in Midlothian .....	96
Figure 7-5: Road Collisions between 2013 and 2022 by casualty severity	99
Figure 7-6: Satisfaction with car travel prior to the Pandemic (n=320) (Source: SEStran Regional Transport Strategy Public Survey 2021) .....	106
Figure 8-1: National Transport Strategy Vision, Priorities and Outcomes	109
Figure 8-2: Regional Transport Strategy Vision and Objectives .....	109

## Tables

Table 2-1: Midlothian Local Development Plan Transport Interventions ...	16
Table 3-1: Employment land supply breakdown by settlement (Source: Midlothian Employment Land Audit 2023).....	30
Table 3-2: Minimum All-Tenure Housing Land Requirement for Midlothian (Source National Planning Framework 4) .....	31
Table 5-1: Additional comments made by Midlothian respondents to the SEStran RTS Survey who indicated that they were dissatisfied with walking and cycling.....	44
Table 6-1: Ring & Go Taxi Service schemes .....	61
Table 6-2: Number of households in Midlothian with convenient access (as defined above) to a bus stop .....	66
Table 6-3: Proportion of households in Midlothian with convenient access to a bus stop but without access to a direct bus connection to Edinburgh City Centre	72
Table 6-4: Operating Day and Journey Time to Edinburgh on the Borders Railway (ScotRail train times 21 <sup>st</sup> May – 9 <sup>th</sup> December 2023) .....	84
Table 6-5: Number of parking spaces at each rail station in Midlothian ....	84
Table 6-6: Cost of single and return tickets to Edinburgh from each station in Midlothian	85
Table 6-7: Punctuality data for the Borders Railway (Source: ScotRail)....	86
Table 7-2: Council car parks in Midlothian .....	101
Table 7-3: Overview of on-street parking restrictions by locality (Source: Midlothian Council) .....	102

Table 7-4: Existing EVCI within Midlothian (Source: Midlothian Council, ChargePlace Scotland, DfT National Chargepoint Registry) .....	105
Table 8-1: Relationship between LTS Outcomes and NTS2 Priorities / RTS Strategy Objectives. ....	116
Table B-1: Wider national policy documents reviewed .....	125
Table B-2: Wider regional policy documents reviewed .....	127
Table B-3: Wider local policy documents reviewed .....	127
Table C-1: Summary of Midlothian bus services .....	131

## Appendices

Appendix A	Wider Policy Documents
Appendix B	Stakeholder Engagement
Appendix C	Midlothian Bus Services



# 1 Introduction

## 1.1 Purpose

1.1.1 Midlothian Council commissioned Stantec to produce a new Local Transport Strategy (LTS) for the Midlothian Council area. LTS documents provides a framework for the delivery of transport at the local level and a means for local authorities to set out how they intend to achieve both national and regional level policy objectives.

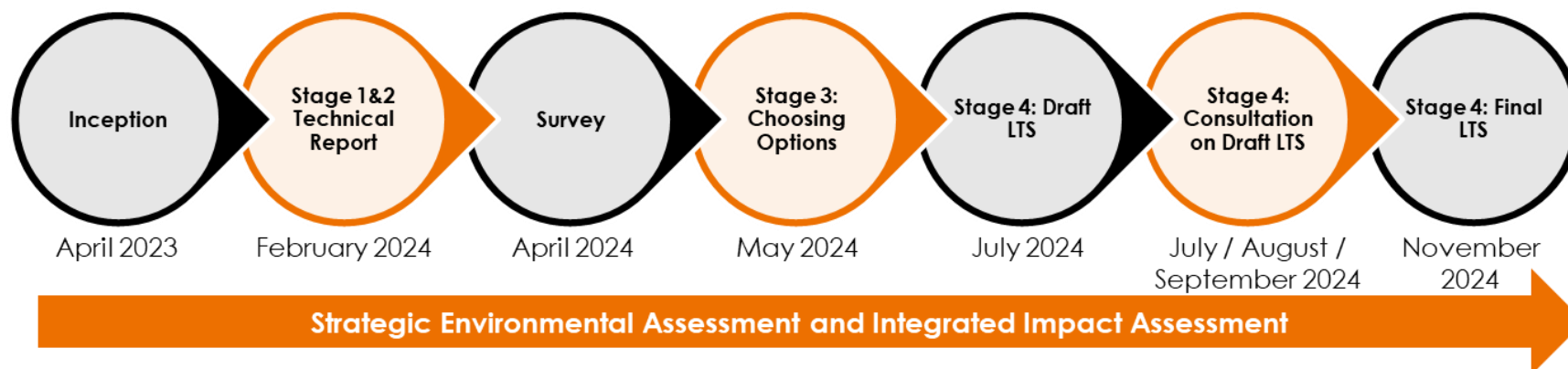
1.1.2 Transport Scotland produced draft guidance on the development of LTS documents (LTSDG) in March 2023<sup>1</sup>. This guidance sets out a five stage LTS development process as follows:

- **Stage 1: Analysis of transport problems and opportunities** – a summary of the current and future transport problems in the local authority area
- **Stage 2: Setting outcomes** – a set of well-defined outcomes specifying what the LTS is seeking to achieve

- **Stage 3: Choosing options** – the identification, sifting and appraisal of a range of options which will help meet the LTS outcomes
- **Stage 4: Implementation** – the development and delivery of a plan for achieving the above
- **Stage 5: Monitoring and evaluation** – the development of a separate Monitoring and Evaluation Plan setting out how Midlothian Council will monitor the delivery of the LTS and determine whether it is achieving the Strategy Outcomes.

1.1.3 **This report sets out the detailed technical analysis which underpins Stages 1 and 2 and summarises the emerging outputs from this work.** It has been informed by a comprehensive data analysis exercise and engagement with key stakeholders.

1.1.4 As shown in the figure below, the **next stage of work involves an online public survey which aims to ensure the full range of problems (and any opportunities) relating to transport in Midlothian are captured and gather any thoughts on the emerging Strategy Outcomes.**



<sup>1</sup> [Local Transport Strategy: Draft Guidance](#)

1.1.5 The findings from this survey will then be used to inform Stage 3 (choosing options) and Stage 4 (the preparation of the LTS document).

1.1.6 A Strategic Environment Assessment (SEA) and Integrated Impact Assessment (IIA) is being undertaken in parallel with the LTS development stages, with SEA and IIA feeding into the overall shape and content of the final document.

## 1.2 Why is a new Local Transport Strategy for Midlothian needed?

1.2.1 There is no statutory requirement for a local authority to produce an LTS. However, Midlothian Council has elected to do so in order to:

- ensure there is a clear long-term plan for transport investment in Midlothian
- articulate how Midlothian will enact both national and regional transport policy objectives
- help maximise Midlothian Council's ability to overcome the transport challenges which the local authority area faces<sup>2</sup>

1.2.2 Forecast level of development in Midlothian are considerable, with the number of houses set to increase by approximately 26% by 2036. This rate of increase will have significant implications for transport demand. **Developing a new LTS provides an important opportunity to clearly set out a plan for meeting the significant challenge presented by this scale of development.**

1.2.3 There is also scope for major technological change in the transport sector in the medium term, including

decarbonisation and automation and there have been significant changes in both commuting patterns and the way we shop in recent years. **The new LTS provides an opportunity to ensure transport investment takes advantage of these changes and addresses any key challenges which they may pose.**

## 1.3 This Report

1.3.1 This report includes further chapters as follows:

- **Chapter 2** - provides a review of key national, regional, and local policy. For each document, a brief summary of the purpose, aims, and objectives is provided before setting out a short commentary on the implication for the LTS.
- **Chapter 3** - provides a review of relevant socio-economic data and considers recent and future housing and employment development and the consequence of this for transport demand and the LTS.
- **Chapter 4** – sets out the approach to identifying problems and opportunities which has been adopted in the development of this Stage 1&2 Report.
- **Chapters 5-7** – provides a baseline of active travel, public transport and road-based connectivity in Midlothian respectively and considers the potential problems associated with each of these modes.
- **Chapter 8** – sets out the Draft Strategy Outcomes and the main resulting changes in travel behaviour and societal impacts associated with these.
- **Chapter 9** – summarises the approach taken in delivering this Draft Stage 1&2 Report and sets out next steps.

<sup>2</sup>There are certain discretionary powers which a local authority may only exercise if they have an LTS which supports such activities. These powers are where the local authority has either a workplace parking licensing (WPL) scheme (under the Transport (Scotland) Act 2019) or a road user charging (RUC) scheme

(under the Transport (Scotland) Act 2001) in its area as well as a number of powers in relation to bus services under Part 2 of the 2001 Act.

## 2 Policy Review

### 2.1 Overview

- 2.1.1 There has been a significant shift in the national, regional, and local policy context in recent years with there now being a particular focus on emission reduction and reducing the need to travel, making better use of existing assets and, where a journey is required, ensuring that where possible this is made by active travel or public transport.
- 2.1.2 To help inform the strategic direction of the LTS, this chapter provides a review of relevant national, regional, and local policy documents. For each document, a brief summary of the purpose, aims, and objectives is provided before setting out a short commentary on the overall policy implication for the LTS. The chapter focuses on the key strategic documents. However, a wider range of relevant policy has been reviewed and is included in Appendix A Appendix A

### 2.2 National Policy

#### National Transport Strategy 2

- 2.2.1 Transport Scotland published its National Transport Strategy 2 (NTS2) which sets out the national action plan for improving and developing transport in Scotland in February 2020. The NTS2 sets the following 'Vision' for Scotland's transport system up to 2040:

*"We will have a sustainable, inclusive, safe and accessible transport system, helping deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors".*

- 2.2.2 The Vision is underpinned by four 'Priorities', namely:

- Reduce inequalities

- Take climate action
- Help deliver inclusive economic growth
- Improve our health and wellbeing

- 2.2.3 The NTS2 also establishes two 'hierarchies' which define how future transport investment decision making and services should be planned (see Figure 2-1). The **Sustainable Travel Hierarchy** defines the priority which will be given to each mode of transport in future investment planning, with walking and wheeling identified as the highest priority and single occupancy car travel the lowest priority. The Sustainable Travel Hierarchy is complemented by the **Sustainable Investment Hierarchy** which establishes a structured set of steps to be followed when planning investment in transport infrastructure, with 'targeted infrastructure improvements' afforded the lowest level of priority.

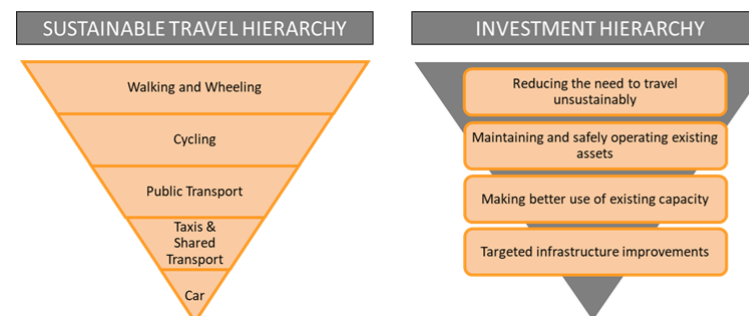


Figure 2-1: Sustainable Travel Hierarchy and Investment Hierarchy

**Policy implication for the LTS:** The LTS, and the interventions which ultimately emerge from it, must align with the Vision and Priorities within NTS2 and the Hierarchies which prioritise active travel and public transport while at the same time discouraging single occupant car journeys.

## Climate Change (Emissions Reduction Targets) (Scotland) Act 2019

2.2.4 Under the 2019 Climate Change Act, the Scottish Government made a legally binding commitment to deliver net-zero carbon emissions by 2045. In addition, two interim targets were developed:

- A 75% reduction in greenhouse gas (GHG) emissions by 2030 relative to 1990 levels of carbon dioxide and 1995 levels of hydrofluorocarbons, perfluorocarbons, sulphur hexafluoride and nitrogen trifluoride.
- A 90% reduction in GHGs by 2040, again relative to the 1990/95 baseline.

**Policy implication for the LTS:** The Scottish Government has made a legally binding commitment to deliver net-zero carbon emissions by 2045 and the LTS will need to support the delivery of this as a priority as well as the associated interim targets.

## Climate Change Plan Update

2.2.5 The Climate Change Plan Update (2020) included two further commitments designed to support the delivery of the above targets:

- An aim to reduce vehicle kilometres travelled by car by 20% by 2030
- A commitment to phase out the need for new petrol and diesel cars and vans and for the conditions to be created to phase out the need for all new petrol and diesel vehicles in Scotland's public sector fleet by 2030
- a £120 million investment in zero emissions buses
- an investment of £50m to create active freeways

**Policy implication for the LTS:** The Climate Change Plan Update sets demanding targets for the reduction of vehicle kilometres and

the registration of new hydrocarbon vehicles. However, it also provides a range of opportunities associated with new funding streams and initiatives that could bring additional investment and improve transport options for communities and people in Midlothian.

## Strategic Transport Projects Review 2

2.2.6 The Strategic Transport Projects Review 2 (STPR2) was published in December 2022 and sets out the Scottish Government's transport investment programme over the 20-year period 2022-2042, detailing how the government will deliver the Vision, Priorities and Outcomes of NTS2. The document splits Scotland into 11 regions and includes recommendations which are relevant to all regions, recommendations which are general but have particular benefit for certain regions, and recommendations which provide benefits across most parts of Scotland. Midlothian falls in the Edinburgh and South East Scotland Region. The recommendations for this region with particular relevance for the LTS include:

### Recommendations specific to the Edinburgh and South East Scotland Region:

- 12) Edinburgh and South East Scotland Mass Transit - Develop and enhance the cross-boundary public transport system for the South East of Scotland, potentially comprising tram and bus-based transit modes including bus rapid transit (BRT) and bus priority measures.

### Recommendations which are general but have particular benefit for the Edinburgh and South East Scotland region:

- (2) Active Freeways and Cycle Parking Hubs - development of active freeways on high-demand corridors in Scotland's large urban areas, with priority given initially to the larger cities. Comprehensive networks of active freeways would connect outlying neighbourhoods, including those with poor



existing links, to city/town centres and other important destinations.

**Recommendations relevant across most parts of Scotland:**

- (1) Connected Neighbourhoods – packages of improvements to active travel infrastructure in and around town and neighbourhood centres to encourage the development of 20-minute neighbourhoods
- (3) Village-town Active Travel Connections – the creation of new and improved active travel routes to connect smaller rural communities with nearby towns, using segregated paths and quiet routes.
- (4) Connecting Towns by Active Travel - the creation of new and improved active travel routes between Scotland's towns using segregated infrastructure.
- (5) Long-Distance Active Travel Network – the creation of new and improved active travel routes between connecting Scotland's cities, regions and major gateways
- (6) Behavioural change initiatives - building on existing programmes to deliver local, regional and national initiatives that encourage, enable and incentivise more people to make use of active and sustainable choices more often
- (7) Changing road user behaviour - implementation of speed enforcement technology and national road safety behaviour change campaigns, education and training initiatives
- (8) Increasing Active Travel to School – Improved and safer walking, wheeling and cycling routes to primary and secondary schools
- (9) Improving access to bikes – through interventions that would build on existing successful programmes and the work of established support groups
- (10) Expansion of 20 mph Limits and Zones – Scaling up current local programmes and initiatives to provide new or expanded 20mph limits and zones.
- (14) Provision of Strategic Bus Priority Measures – Implementing bus priority measures within Scotland's cities and towns where congestion is highest.
- (19) Infrastructure to provide access for all at railway stations - review of station accessibility across Scotland to identify and remove barriers to travel and improve access for all
- (20) Investment in Demand Responsive Transport and Mobility as a Service – Establishing whether existing resources could be better utilised across the public network, either on the basis of fixed route services or through flexible routing.
- (21) Improved Public Transport Interchange Facilities – Rolling out improved infrastructure design to, and within bus and railway stations, and improved information, signage and wayfinding, by upgrading the accessibility and quality of passenger facilities at existing bus stations and other transport interchanges, or where needed, construction of new facilities.
- (22) Framework for the Delivery of Mobility Hubs – A delivery framework for mobility hubs is developed in collaboration with stakeholders to facilitate the creation of high-quality mobility hubs across Scotland.
- (23) Smarter, Integrated Public Transport Ticketing – Building on the interventions and new services delivered under the 2018 Smart and Integrated Ticketing and Payments Delivery Strategy to continue with the support and ongoing delivery of fully integrated smart ticketing and payment services across all public transport modes.
- (25) Decarbonisation of the Rail Network – Conducting a business case assessment on the Tweedbank – Newcraighall (Borders Line) to determine the feasibility of decarbonisation.
- (26) Decarbonisation of the Bus Network – Providing further investment to stimulate the commercial roll out of zero emission buses.

- (28) Zero Emission Vehicles and Infrastructure Transition – A national framework for zero emission vehicles is established to support and accelerate the shift to zero emission mobility through targeted funding to enable investment in fleets, facilities and emerging technologies.

2.2.7 The recommendations identified in STPR2 include a wide range of interventions focused around improving active travel and public transport connections in line with the priorities identified in NTS2. In the South East Scotland region, the delivery of a mass transit system is identified as a key priority. This is intended to improve region wide connectivity by providing more options for cross boundary travel and reducing the need for unnecessary changes between services. STPR2 notes that the system would focus on key corridors of demand as well as where congestion impacts on bus services and where the public transport offer is more limited, including targeting more disadvantaged areas where there can be greater dependence on public transport

**Policy implication for the LTS:** STPR2 includes a range of interventions focused on improving active travel and public transport connections between communities, including the development of a mass transit system in Edinburgh and enhancing cross boundary connections. Given Edinburgh is a major focus for trips from Midlothian, the delivery of a mass transit system and options for improving cross border connections between the two local authority areas will be a key consideration for this LTS.

## National Planning Framework 4

2.2.8 The Scottish Government published National Planning Framework 4 (NPF4) in February 2023. This sets out proposed priorities and policies for the planning system up to 2045. The document identifies six spatial principles which will guide the development of future places, namely:

- Just transition – ensuring the transition to net zero is fair and inclusive

- Conserving and recycling assets – making productive use of existing buildings, places, infrastructure, and services
- Living locally – support local liveability and ensure people can easily access services, greenspace, learning, work, and leisure locally
- Compact urban growth – limiting urban expansion
- Rebalanced development – targeting development in areas of past decline
- Rural revitalisation – encourage sustainable development in rural areas

2.2.9 The document also sets out a series of nationally important developments. Those with particular relevance for Midlothian include:

- Urban Mass / Rapid Transit Networks – development of mass / rapid transit systems for Edinburgh (through plans to extend the tram network) and the associated region in order to support placemaking and improve transport equity. NPF4 notes that such plans provide an opportunity to substantially reduce levels of car-based commuting, congestion, and emissions from transport at scale.
- Central Scotland Green Network – the creation and / or enhancement of multi-functional green infrastructure, including routes for active travel and / or recreation.
- National Walking, Cycling and Wheeling Network – New and / or upgraded routes suitable for a range of users for walking, cycling and wheeling that help create a national network that facilitates short and longer distance journeys and linkages to multi-modal hubs

2.2.10 NPF4 also identifies specific priorities for each region. Those for Central Scotland are as follows:

- Pioneer low carbon, resilient urban living by rolling out networks of 20-minute neighbourhoods, future proofing city and town centres, accelerating urban greening, investing in

net zero homes, and managing development on the edge of settlements

- Target economic investment and build community wealth to overcome disadvantage and support a greener well-being economy

2.2.11 The document discusses the growth of remote and local working since the COVID-19 pandemic and notes that “the creation of hubs within groups of settlements could significantly reduce the need to travel, whilst also helping to grow local business and communities”.<sup>3</sup> The investment in significant development clusters in the Edinburgh City Region, including in Midlothian, is highlighted and the need to both take into account new development (which has the potential to compound existing capacity constraints and congestion) and prioritise sustainable choices is emphasised<sup>4</sup>.

2.2.12 NPF4 also sets out the ‘Minimum All-Tenure Housing Land Requirement’ (MATHLR) which is the minimum number of housing units to be provided in each planning authority in Scotland for a 10-year period. Further information on Midlothian’s MATHLR and the implications of this in terms of future development and transport demand are discussed in Section 3.3.

**Policy implication for the LTS :** While acknowledging the need for significant new housing stock, NTS2 sets out an approach which is focused around local living (including 20-minute neighbourhoods), limiting urban expansion, and encouraging sustainable transport connections to employment and key services. The document also references the development of a mass / rapid transit system for Edinburgh and the associated region as noted above as well as a national walking, cycling, and wheeling network. The principles established in the NTS2 will need to be reflected in both the LTS and Midlothian’s next LDP (see below).

<sup>3</sup> p135

## Sustainable Travel to Stations

2.2.13 Sustainable Travel to Stations is a Strategy document produced by Scotland’s Railways which aims to increase rail passenger numbers, contribute to a net zero economy, and help people live locally.

2.2.14 The document sets out Scotland’s Railways’ overarching aim to **carry twice as many customers as it did pre-pandemic by 2035** equating to at least 190 million passenger journeys. Achieving this target would involve a fundamental shift to rail travel, requiring an increase in passenger journeys of 126 million from the 64 million carried in 2022/23.

2.2.15 The document also includes specific targets for increasing sustainable travel to stations as follows:

- **1. Walking & Wheeling:** increase walking/wheeling trips to stations from 33% in 2022 to 50% in 2035. From 21 million in 2022 to 95 million trips in 2035.
- **2. Cycling:** increase cycling trips to stations from 9% in 2022 to 20% in 2035. From 6 million trips in 2022 to 38 million trips in 2035.
- **3. Bus:** increase bus trips to stations from 14% in 2022 to 20% in 2035. From 9 million trips in 2022 38 million trips in 2035.
- **4. Private car:** reduce percentage driving/being driven to stations from 27% in 2022 to 10% in 2035.

**Policy implication for the LTS:** Sustainable Travel to Stations includes an ambitious target to **increase rail passenger journeys by 126 million by 2035**. To achieve this overarching aim, it is likely that significant investment in the rail network would be

<sup>4</sup> See p138



required. At the Midlothian level, encouraging rail travel and enhancing sustainable access to rail stations should be a key priority for the LTS in line with these wider policy objectives.

## 2.3 Regional Policy

### SEStran 2035 Regional Transport Strategy

2.3.1 SEStran, the Regional Transport Partnership (RTP) for the South East of Scotland formally adopted its new Regional Transport Strategy (RTS) in June 2023. The RTS sets out the strategic framework for the development of transport in south east Scotland up to 2035. As a regional strategy, the RTS has a particular focus on regional travel i.e. travel between local authorities.

2.3.2 The overarching Vision of the RTS is:

*‘A South-East of Scotland integrated transport system that will be efficient, connected and safe, creating inclusive, prosperous, and sustainable places to live, work and visit, affordable and accessible to all, enabling people to be healthier and delivering the region’s contribution to net zero emissions targets.’*

2.3.3 This is supported by four Strategy Objectives as follows:

- Transitioning to a sustainable, post-carbon transport system
- Facilitating healthier travel options
- Widening public transport connectivity and access across the region
- Supporting safe, sustainable and efficient movement of people and freight across the region

2.3.4 The document includes a summary of the key transport problems facing the region and sets out a Spatial Strategy which identifies a series of Regional Corridors on which there

should be a particular focus in terms of reducing car use and achieving modal shift.

2.3.5 In Midlothian, two Regional Corridors can be considered to exist. This document identifies them as follows:

- Midlothian East – connecting the Bonnyrigg / Dalkeith / Gorebridge triangle to Edinburgh and beyond
- Midlothian West – connecting Penicuik / Loanhead to Edinburgh and beyond

2.3.6 The document that outlines a set of Regional Mobility Themes (RMTs) and associated Policies and Actions which set out a direction of travel for the delivery of transport in the region up to 2035. The RMTs are as follows:

- Shaping development and place – ensuring the land use planning process and transport planning process are closely integrated with sustainable principles at their heart
- Delivering safe and active travel – improving and providing new infrastructure and facilities for walking, wheeling and cycling, including through completion of the SEStran Strategic Network and prioritising roadspace for active travel in towns and cities
- Enhancing access to and accessibility of public transport – improving the accessibility of public transport through both physical (improving vehicles and stops) and non physical interventions (improving information, including introducing Real Time Information, and making public transport affordable for all)
- Transforming and extending the bus service – introducing new bus services, more direct bus services and /or express services, increasing bus service frequency, and implementing bus priority measures. Associated Actions include undertaking a regional study to help identify bus corridors and bus priority interventions where Edinburgh is a focus

- Enhancing and extending rail services – including improving existing connections and delivering new connections, including the implementation of an Edinburgh and South East Scotland Mass Transit system
- Reallocating road-space on the regional and local network – re-allocating road space away from general traffic to specific groups of road users, including public transport and active travel
- Delivering seamless multi-modal journeys – a range of measures, including implementing integrated ticketing across all modes, delivering a network of multi-modal mobility hubs, and enhancing park and ride provision
- Decarbonising transport – measures to decarbonise the vehicle fleet, including the roll out of electric vehicle (EV) charging infrastructure
- Facilitating efficient freight movement and passenger travel – targeted infrastructure investment to tackle congestion hotspots and improve resilience and measures to facilitate freight modal shift from road to rail
- Working towards zero road deaths and serious injuries – road safety schemes, including the implementation of 20mph zones and other road safety measures in urban and rural environments
- Reducing car kilometres – a range of measures aimed at reducing car kilometres in line with Scotland's climate change commitments, including demand management, car sharing, enhancing park and ride provision and behavioural change measures
- Responding to the post-COVID-19 world – responding to changes in the way people travel following COVID-19.

**Policy implication for the LTS:** The RTS sets out the framework for the development of transport at the regional level and, mirroring the national level documents, focuses on improving active and

public transport connections and achieving modal shift so as to reduce car travel. This LTS will need to align with the objectives, policies, and actions set out within the RTS, focusing on the delivery of these at the local level.

### Indicative Regional Spatial Strategy for Edinburgh and South East Scotland

- 2.3.7 The Planning (Scotland) Act 2019 removed the need for the preparation of Strategic Development Plans (SDP) and introduced the concept of Regional Spatial Strategies. These are non-statutory documents which provide a spatial representation of the key regional land use issues which need to be addressed across the region and are intended to help guide planning policy at the local level. Following the Planning (Scotland) Act, an interim Regional Spatial Strategy (iRSS) for Edinburgh and South East Scotland City Region<sup>5</sup> was subsequently submitted to Scottish Government for consideration.
- 2.3.8 The iRSS notes that there is significant development planned in the region and that if this is to be delivered there needs to be “a transformational approach to transport and travel – connecting people and places by sustainable strategic public transport and active travel corridors”, with “better connectivity, physical and digital, and new infrastructure that allows sustainable movement” identified as critical to success.
- 2.3.9 The document is focused around three overarching themes as follows:
  - Adaptable Region – addressing climate change, ensuring conservation and good design

<sup>5</sup> See [iRSS+final+.pdf \(squarespace.com\)](#)

- Accessible Region – viable sustainable transport options, access to employment, sustainable housing land, digital access
- Regional Recovery and Renewal – economic renewal, tackling inequality, environmental improvement

2.3.10 The document contains a section which focuses specifically on Midlothian and includes a Spatial Strategy for the local authority area. This section notes that the following are particularly important for Midlothian:

Maintaining the character of the area by:

- supporting and promoting existing town centres while also seeing key development sites of regional significance being delivered, in particular the Shawfair new settlement comprising over 5,000 new homes, a town centre, 70 hectares of employment allocations, and new schools and community facilities
- reinforcing the Green Belt and expanding cross boundary green network opportunities along the A720 City Bypass between Straiton, Lasswade, Gilmerton and Sheriffhall junctions to mitigate impacts of new development either side of the City bypass and maintain the character of the area
- continued development of the Midlothian Science Zone (the biotechnology campus at the Bush); the 60 hectare 'Midlothian Gateway' employment site at West Straiton (which it is hoped will incorporate a new arena to service the south east of Scotland and beyond) and the Salters Park employment site (which it is hoped will incorporate a new film and television studio)

2.3.11 In terms of transport, the iRSS references several specific schemes relevant to Midlothian including:

- improving economic cluster linkages by cross boundary tram connectivity e.g., from Edinburgh Bioquarter to the Bush in Midlothian

- improved north-south transport links such as the full dualling of the A68 and A7 road networks
- implementing existing commitments, including the new Sheriffhall junction, the A701 relief road and associated A702 link / active travel improvements, and the A7 urbanisation project – the document notes that while not the focus of climate policy, 'efficiency in roads is required to be addressed' and 'must be part of an overall zero carbon vehicle use strategy for the area'

2.3.12 More generally the document identifies a range of potential transport interventions, including:

- faster and more efficient bus services in and out of Edinburgh from surrounding areas
- the delivery of transport interchanges / hubs around Edinburgh
- increasing uptake of e-bikes
- identifying new Park and Ride opportunities
- upscaling electric vehicle (EV) charging infrastructure

**Policy implication for the LTS:** The iRSS clearly articulates the need for transformational change in terms of transport provision and delivery given the significant development proposed in the region. For Midlothian, several specific schemes are identified, including the potential of cross boundary tram connectivity into Edinburgh and several road improvement schemes. The document also identifies a range of more general measures designed to improve sustainable transport use, all of which should be considered within the LTS.

## 2.4 Local Policy

### Midlothian Local Development Plan

2.4.1 The current Midlothian Local Development Plan (LDP) was adopted in November 2017. The LDP was produced in the

context of the SESplan SDP produced in 2013 and covers the period up to 2024. As noted above, the need for SDPs was removed under the Planning (Scotland) Act 2019, with NPF4 now forming part of the development plan alongside RSSs. In this context, Midlothian is currently preparing a new LDP (Midlothian Local Development Plan 2 – MLDP2). It is anticipated that this document will be adopted in December 2026, with the document covering the ten-year period between 2026 and 2036.

- 2.4.2 A detailed review of the Strategy for Development set out in the 2017 LDP is included in Section 3.3. In terms of transport, 'Policy Tran 2' in the 2017 LDP identifies a package of transport interventions designed to support the delivery of the strategy. These are detailed in the table below.
- 2.4.3 The 2017 LDP identifies the Edinburgh and South East Scotland City Region Deal as the agreed funding and delivery mechanism for the road interventions identified (the A701 Relief road and A702 link road; the A702/Bush Loan junction and the grade separation of Sheriffhall Roundabout).

Table 2-1: Midlothian Local Development Plan Transport Interventions<sup>6</sup>

Transport Issue	Transport Intervention
Trunk Roads	A720 Sheriffhall Junction Grade Separation <sup>7</sup>
Strategic Roads	Shawfair Strategic Development Area: A720 / A68 Junction (Newton Farm)*
	A7/A68 Corridor Strategic Development Area: A7 Urbanisation*
	A701 Corridor Strategic Development Area: A701 Relief Road and A702 Link with Associated Junctions*
	Newton Farm Link Road*
	B6482 Bryans Road to Gowkshill Link**

Transport Issue	Transport Intervention
Local Roads Serving New Developments	South Mayfield Distributor**
	North West Penicuik Link**
Junction Improvements	A702 / Bush Loan*
	A702 / A703 Damhead*
	A701 / Graham's Road / Belwood Road*
	Lothian Street / High Street, Bonnyrigg*
	A7 / The Wisp*
	The Wisp / Millerhill Road*
Park and Ride	Sheriffhall (Extension)
	A68 North (Newton Farm)*
	Lothianburn
Public Transport	Orbital Bus Route (A720 City Bypass)
	Shawfair Infrastructure**
	Supported Bus Services in Connection with New Developments*
	Potential Rail Station at Redheugh**
	Tramline 3 to Dalkeith
	Millerhill-Loanhead Rail Safeguard
Cycling / Walking	Infrastructure Improvements to complement Borders Rail

**Policy implication for the LTS:** The current Midlothian LDP was produced in 2017 and Midlothian is currently preparing a new LDP which reflects the changing legislative and policy context. The LTS will be delivered in advance of this LDP and should reflect the

principles set out in NPF4. The previous LDP identified a range of transport interventions designed to support the development proposed within Midlothian, much of which are yet to be delivered. This development and the development requirements identified in NPF4 for MLDP2, notably the minimum 8,850 MATHLR housing requirement for MLDP2, should be considered during the option development stage of the LTS.

plans have been developed for Mayfield and Gorebridge, Further information on these is included in Appendix

**Policy implication for the LTS:** the Midlothian Single Plan contains a series of objectives, actions, and outcomes which are both directly and indirectly related to transport provision and should be reflected within the LTS.

### Single Midlothian Plan 2023-2027

- 2.4.4 The Single Midlothian Plan sets out a shared plan to improve the lives of local people in Midlothian and is produced by the Midlothian Community Planning Partnerships (CPP) which draws together public, voluntary and private sector bodies. The Plan includes a series of objectives with a set of shared actions and outcomes set out under each of these. The objective most relevant to this strategy is 'Make Midlothian Greener'. Under this objective, the following actions are identified:
- promoting available active travel information and events
  - working with Sustrans, SEStran, and neighbouring local authorities to identify opportunities for bike / e-bike hire projects
  - increasing bike storage and the number of mobility hubs and encouraging multi-modal journeys
  - establishing a shared transport scheme across Midlothian
- 2.4.5 In addition to the above actions which explicitly relate to transport, enhancing transport provision could also help achieve wider outcomes such as improved health and well-being and reduced poverty (e.g., through enhancing access to employment and training opportunities) and making significant progress towards getting to net zero by 2030.
- 2.4.6 As part of the Single Midlothian Plan, Midlothian has developed Action Plans for priority areas and up to now action





## 3 Local Authority Profile

### 3.1 Overview

- 3.1.1 Understanding the current and potential future socio-economic and demographic context of an area is vital when developing a transport strategy. This chapter therefore provides a profile of the Midlothian local authority area. It includes:
- a review of key socio-economic and demographic metrics to understand the current position with regard to the population and employment in Midlothian
  - a detailed review of the scale of recent and future housing and employment development in Midlothian and consideration of the implications of this for transport demand, and the delivery of the LTS.

### 3.2 Socio-economic profile

#### Population

- 3.2.1 The population of Midlothian was 94,680 in 2021<sup>8</sup>. This is now estimated by the Council to be approximately 98,600. The population has continually increased since 2006 (see Figure 3-1) and Census 2022 show it grew by 16.1% between 2011 and 2022. This rate of increase is higher than any other local authority in the SEStran region and is considerably higher than the 3% growth seen at the Scottish level over a similar time period.
- 3.2.2 The growth in population is associated with a range of factors, most notably the significant housing development which has occurred in Midlothian over the recent period (see Section 3.2.7), with a large proportion of new housing estates having

been developed, many of which are located in greenfield locations.

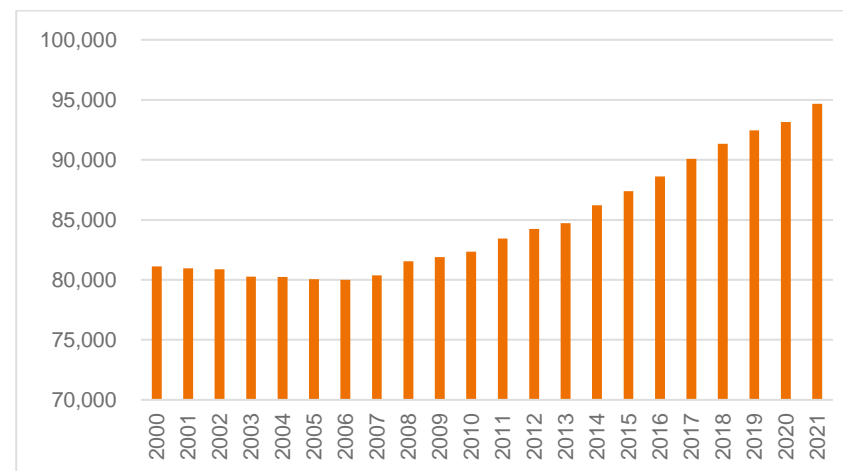


Figure 3-1: Midlothian populations 2000 - 2021 (Source: NRS mid-year population estimates 2021)

**Key point:** Driven in part by significant housing development, Midlothian's population has grown rapidly in the last decade, increasing by more than 16% between 2011 and 2022. This increase in population has placed increased demand on the transport network, contributing to capacity constraints and connectivity problems in some locations.

#### Age profile

- 3.2.3 The age profile of the Midlothian population in 2021, together with the comparator areas is shown in Figure 3-2.

<sup>8</sup> National Records of Scotland Mid-Year Population Estimates, 2021

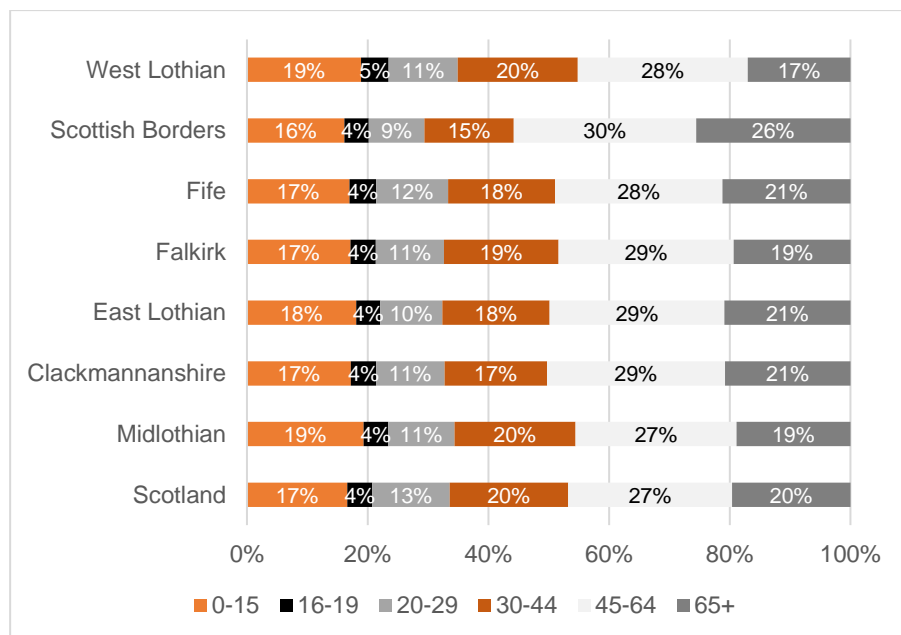


Figure 3-2: Age breakdown (Source: 2021 Mid-year population statistics, NRS)

- 3.2.4 Midlothian has a higher proportion of people aged 15 and below than any other local authority in the SEStran region. The younger demographic in Midlothian is again associated with recent housing development, much of which is lower density housing popular with families.
- 3.2.5 While the proportion of people aged 65 and above in Midlothian is lower than that of East Lothian, Fife and the Scottish Borders, the older demographic still makes up a considerable portion of the population, with figures above that

of both West Lothian and Edinburgh. The percentage of older people in Midlothian is also projected to increase.

- 3.2.6 Older people generally have more health-related issues which can have implications for transport delivery. For example, amongst the Midlothian respondents to the 2021 public survey undertaken to inform the development of the SEStran RTS, 14% (n=57) indicated they had a long-term health condition, with 56% of these (n= 32) noting that it affected their mobility and 28% (n=16) stating that it affected their ability to use bus and / or local rail services.

**Key point:** Midlothian has a high proportion of people in both the younger age categories and with around a fifth of residents aged 65+, and both have the potential to create pressures on certain public services, including public transport. Given that a large proportion of the population fall into the older demographic and the relationship between age and health issues, ensuring transport services are accessible for all will also be an important consideration for the LTS.

## Housing

- 3.2.7 Figure 3-3 shows the new build completion rates per 10,000 population<sup>9</sup> for Midlothian and the comparator areas between 2006/7 and 2022/23.
- 3.2.8 As shown, **new build completion rates in Midlothian have been consistently higher than the other local authority areas on a per capita basis** since the 2008 financial crisis. In 2022/23, there were 908 new build completions in Midlothian, higher than any other year<sup>10</sup>.
- 3.2.9 House prices in Midlothian are amongst the highest in Scotland, with the median selling price increasing by 65%

<sup>9</sup> Completions in each financial year compared to population as at June 30 each year. (Population from 2021 rolled forward to 2022)

<sup>10</sup> Midlothian Council Housing Land Audit 2023

between 2013 and 2023 compared to a 48% increase in Scotland as whole. In addition to higher demand for houses as buyers are priced out of the Edinburgh market, this increase in prices is also likely to be partly due to newer housing developments being composed of a higher proportion of larger, family homes.

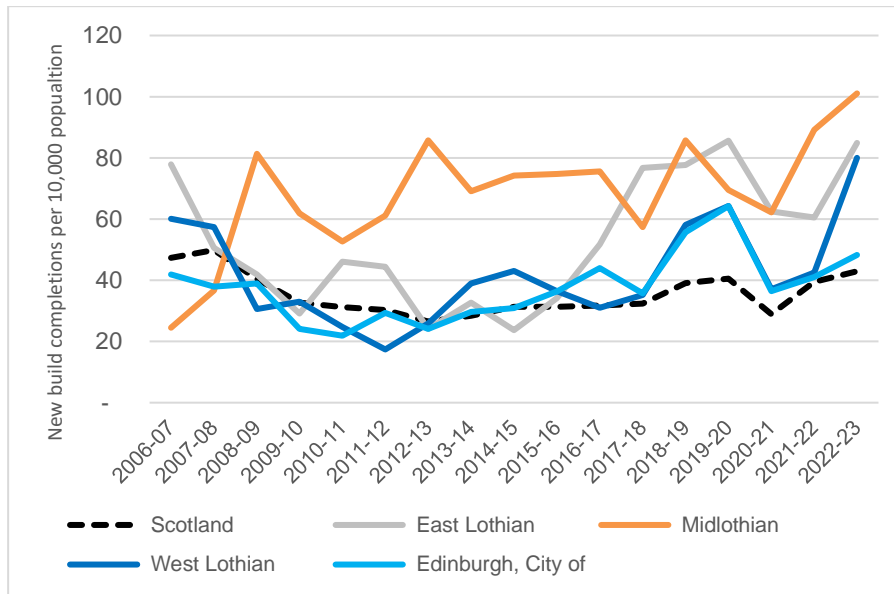


Figure 3-3: New build completion rates per 10,000 population by local authority area (Source: Scottish Government Housing Statistics)

## Population Projections

3.2.10 Figure 3-4 shows National Records of Scotland (NRS) population projections for Midlothian, Scotland and the comparator areas for the period 2018 to 2043 and Figure 3-5 displays the estimated population change for children (ages 0 – 15), working-age people (16 – 64) and pensionable age (65+) between 2018 and 2038.

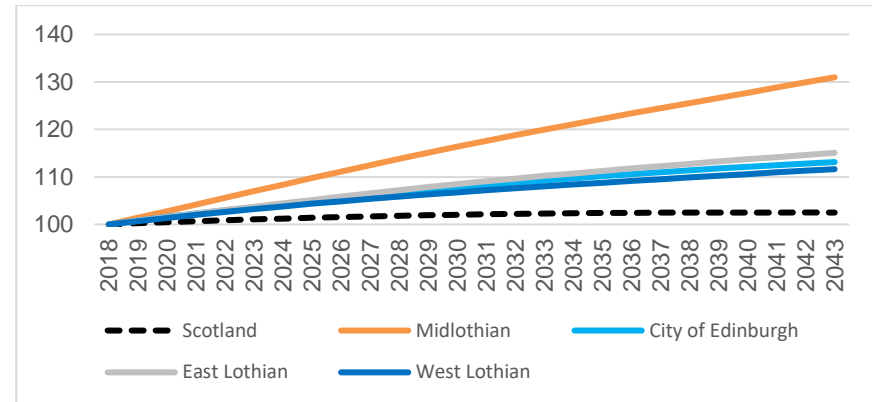


Figure 3-4: Population Projections 2018 - 2043 (Source: NRS, Population Projections for Scottish Areas (2018 Based)) (2018 = 100)

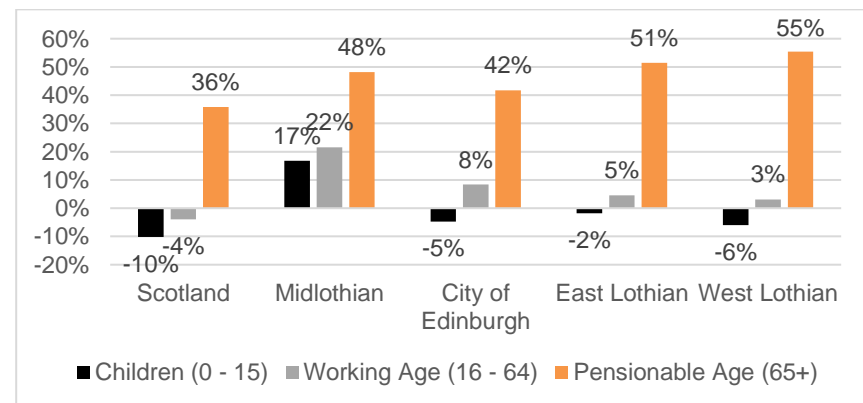


Figure 3-5: Population Estimates - Change in Age Group 2018 - 2038 (Source: NRS, Population Projections for Scottish Areas (2018 Based))

3.2.11 The main points from these graphs are as follows:

- Midlothian's population is projected to increase considerably, growing by 31% by 2043. This is the highest figure of any local authority in Scotland and compares with a 3% increase



at the Scottish level, a 15% increase in East Lothian, a 13% increase in Edinburgh and a 12% increase in West Lothian. The significant growth in Midlothian accords with the NPF4 housing targets which forecast a significant increase in the number of homes (see Section 3.3.11).

- Midlothian is forecast to see a considerable growth in the number of children (17%) compared to the comparator areas, all of which are set to see a decline in the proportion of this demographic.
- While the number of people aged 65 and over is set to grow at a slower rate in Midlothian than both East Lothian and West Lothian, this demographic is still set to increase by more than 48% up to 2043.
- Midlothian is forecast to see a much larger growth in the working age population (22%) compared to the comparator areas (5% and 3% in East Lothian and West Lothian respectively). However, the growth in the number of children and those aged 65 and over still results in an increase in the dependency ratio<sup>11</sup> (from 58% to 62%), meaning that fewer working people have to support a growing number of dependents (young and old).

**Key point:** The earlier trends outlined above are set to continue, with a continued growth in Midlothian's population, including an increase in both the older and younger demographics. This increase in population will place increased demand on the transport network, contributing to capacity constraints and connectivity problems in some locations. There will also be increasing demand for transport from both the older and younger age groups and therefore the LTS will need to ensure that transport services effectively cater to both groups.

<sup>11</sup> The dependency ratio is the ratio between the number of dependents (those aged 15 and under and 65 and over) and the working age population (aged 15-64).

## Households with access to a car

3.2.12 Household car availability is one of the main determinants of travel behaviour. While this data is recorded in the Census, the most recent Census data available is 2011 which is now considerably out of date. In the absence of Census data, Figure 3-6 shows household car ownership as recorded via the 2021 Scottish Household Survey (SHS). The sample size for each area on which the data is based is shown in brackets in.

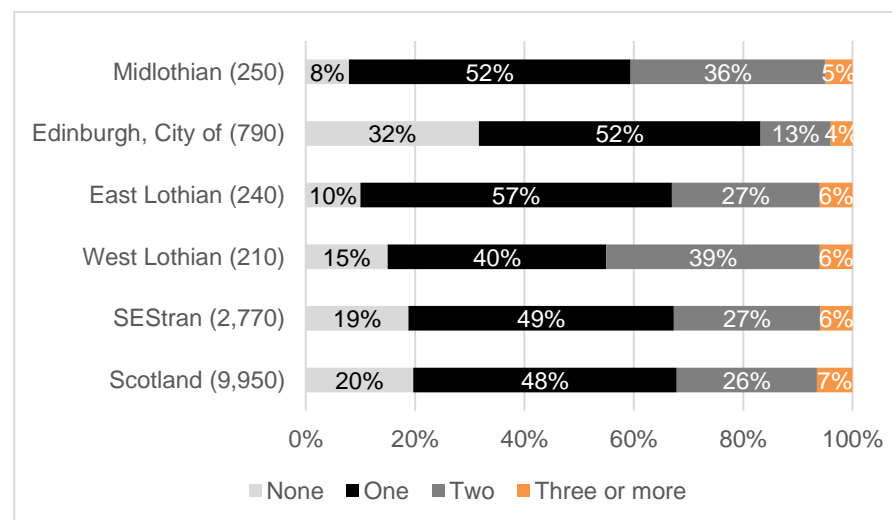


Figure 3-6: Number of cars available for private use by household (Scottish Household Survey Travel Diary, 2021)

3.2.13 According to this data, Midlothian has amongst the highest levels of car ownership of all the comparator areas, with just 8% of households without access to a vehicle. This compares to 10% in East Lothian and 15% in West Lothian.

Where the dependency ratio is large, it indicates that the working population faces a greater burden supporting the dependent population.

Midlothian also has amongst the highest number of households with access to two vehicles.

- 3.2.14 These figures imply a high degree of car dependency in Midlothian and underlines a particular challenge for the LTS given the prevailing national policy context which is focused on reducing car dependency and increasing opportunities for access to shared vehicles.

**Key point:** While somewhat out of date, available data suggests that there were high levels of car ownership in Midlothian in 2011. In line with wider policy, it is important that the LTS supports active and sustainable modes so as to reduce overall car dependency.

## Deprivation

- 3.2.15 The Scottish Government produces the Scottish Index of Multiple Deprivation (SIMD) which is the official measure of relative deprivation for small areas in Scotland. SIMD measures deprivation at the data zone level and is made up of seven 'domains' or types of deprivation, namely: income; employment; health; education; skills and training; geographic access to services; crime; and housing.
- 3.2.16 Figure 3-7 shows the levels of deprivation in Midlothian. Each data zone is classified into one of ten deciles. The generally accepted point at which an area is defined as deprived is when it is classified in the '20% most deprived'.

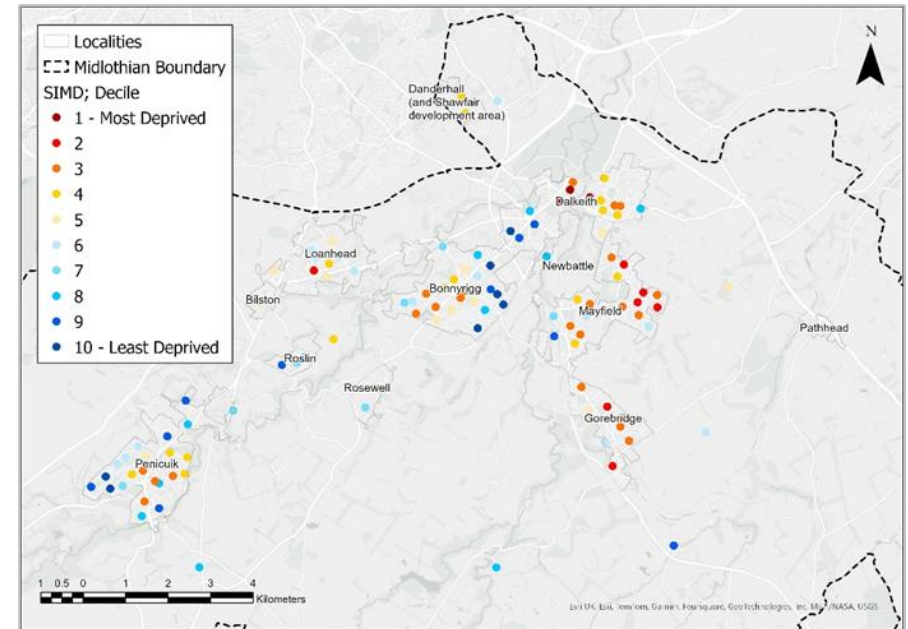


Figure 3-7: Midlothian Deprivation Decile Ranking (Source: Scottish Index of Multiple Deprivation 2020)

## Economic Activity

- 3.2.17 Figure 3-8 shows levels of economic activity in Midlothian, the comparator areas, and Scotland as a whole in 2022. For clarity:
- The **economically active** are those aged 16-64 who are either in employment or defined as unemployed and seeking work using the International Labour Organisation (ILO) definition.
  - The **economically inactive** are those aged 16-64 who are neither in employment nor unemployed (on the ILO measure). This group includes people who are caring for their family or retired.

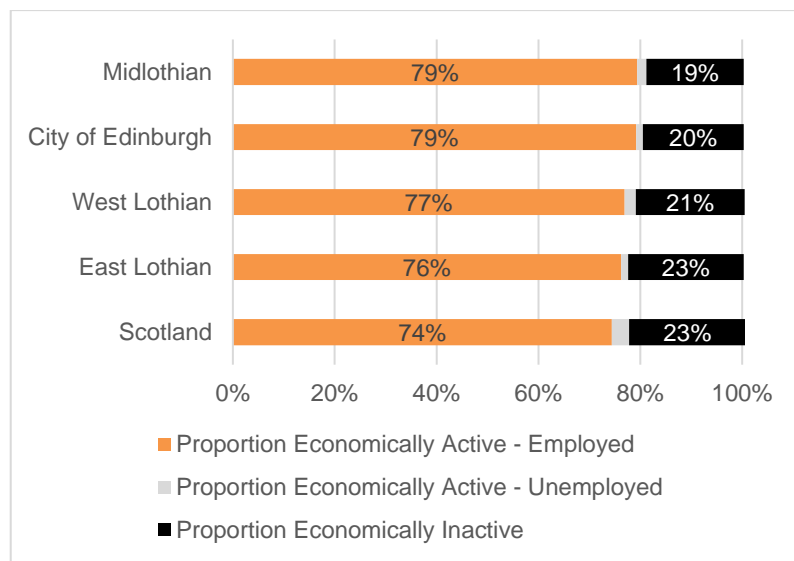


Figure 3-8: Economic Activity Rate (Source: Office National Statistics Annual Population Survey, 2022)

3.2.18 Midlothian performs very well compared to the other local authority areas, with a high rate of economic activity which is equivalent to the capital.

### Commuting Patterns

3.2.19 The most comprehensive information on commuting patterns is the travel to work data recorded via the UK Census. Data from this source has been analysed and is presented below. It should be noted, however, that while the Census provides the most comprehensive source of information on this metric, the most recent data available is 2011 which is now somewhat out of date. A note of caution should therefore be taken when interpreting the results.

3.2.20 Figure 3-9 shows the workplace location of employed adults who reside in the different areas in Midlothian as recorded via the 2011 Census.

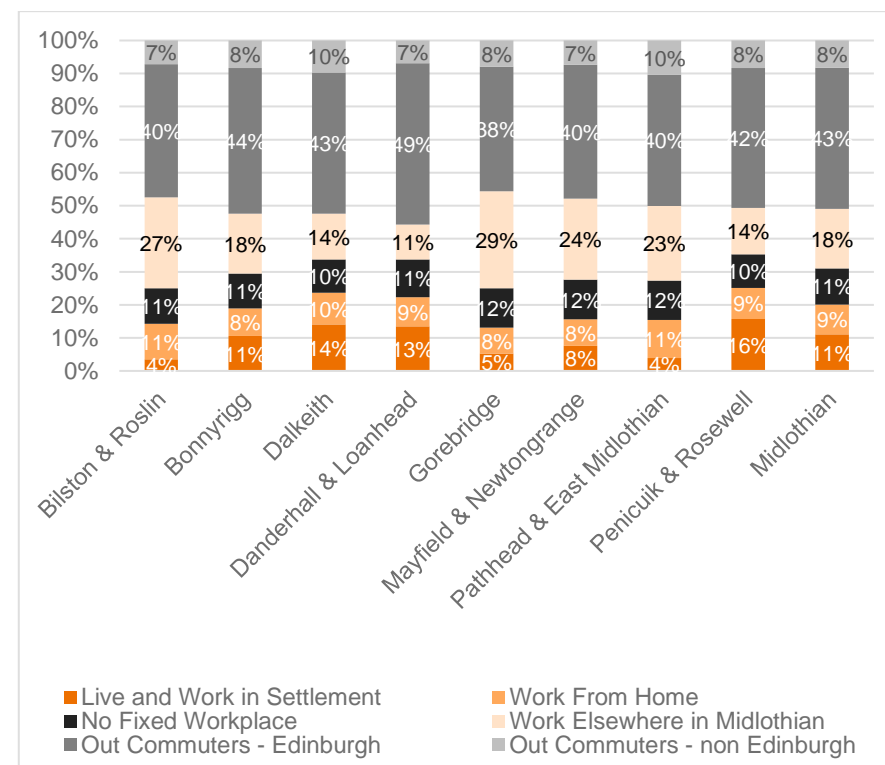


Figure 3-9: Workplace location of residents of Midlothian by area (Source: Census 2011)

3.2.21 At the Midlothian level, over 50% of residents in 2011 travelled outside of the local authority area for work, with the majority of these (43%) travelling into Edinburgh. This compared to approximately 38% who worked within Midlothian. The pattern at the local authority level was broadly replicated across the towns, with the proportions travelling out of the local authority area for work varying between 46% (Gorebridge) and 56% (Danderhall and

Loanhead). In addition to flows from Midlothian to Edinburgh, there are also flows from the Scottish Borders to Edinburgh which pass through Midlothian. Based on the 2011 Census, approximately 4,100 people travelled from the Scottish Borders to Edinburgh for work (compared to approximately 17,500 Midlothian residents), with 10.7% of Borders residents working in the Capital.

3.2.22 Figure 3-10 shows the method of travel to work for employed adults resident in the different areas in Midlothian.

3.2.23 At the Midlothian level, the most used travel to work mode in 2011 was car with over 60% of Midlothian residents driving to work and a further 6% travelling as car passengers. In total, 22% travelled to work by bus and 9% used active travel modes. Use of the car when commuting varied across the areas with the highest rates in Pathhead and East Midlothian where bus and active travel connections are relatively poor compared to other locations.

3.2.24 While the majority of Scottish Borders residents travelled to Edinburgh by car in 2011, the opening of the Borders Railway in 2015 as well as wider changes, including COVID-19 will likely have led to considerable changes in travel patterns and mode use.

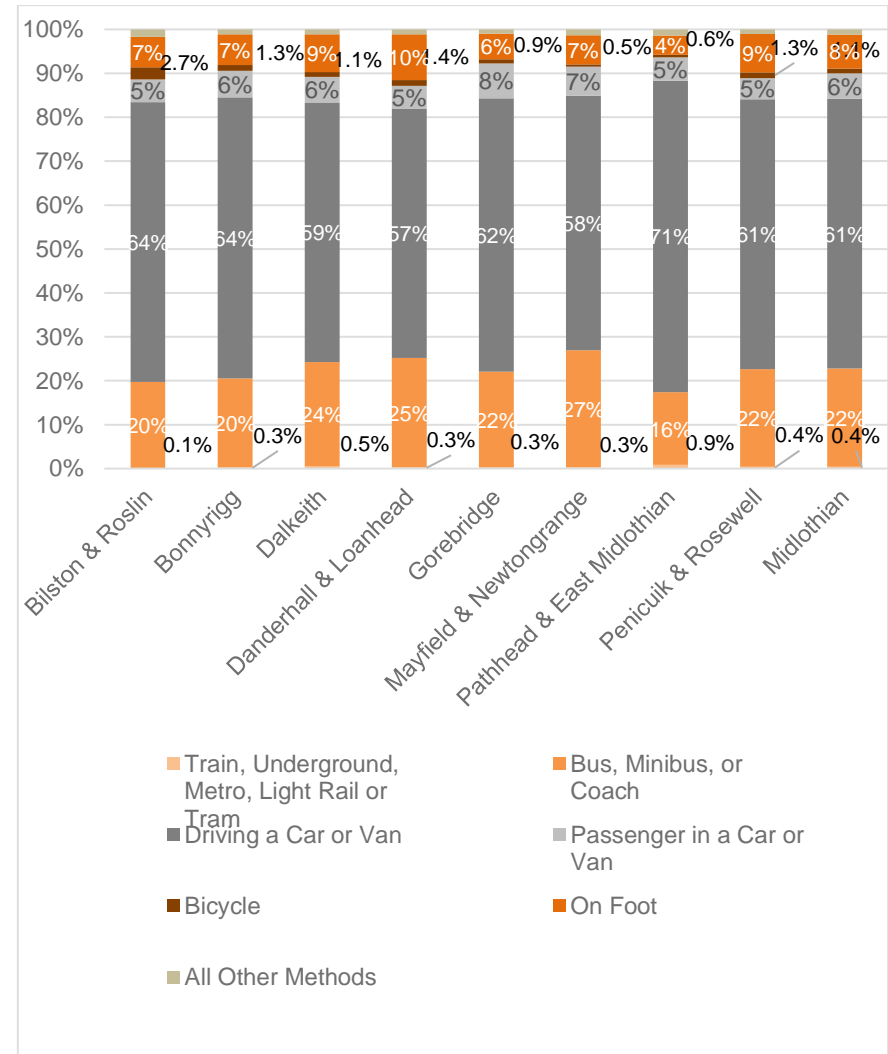


Figure 3-10: Method of travel to work of people residing in Midlothian by location (Source: Census 2011)

3.2.25 Data on commuting trips is also available via the Scottish Household Survey (SHS). This dataset is based on data covering the period 2015-2019 and is therefore more recent than the 2011 Census although it is noted that the data still pre-dates the COVID-19 pandemic. In contrast to the Census, the data is also based on a sample and figures are only available for the Lothians as a whole (i.e., Midlothian, West Lothian, and East Lothian combined). Figure 3-11 shows the percentage of employed adults in the Lothians who work in each council area based on data from this source.

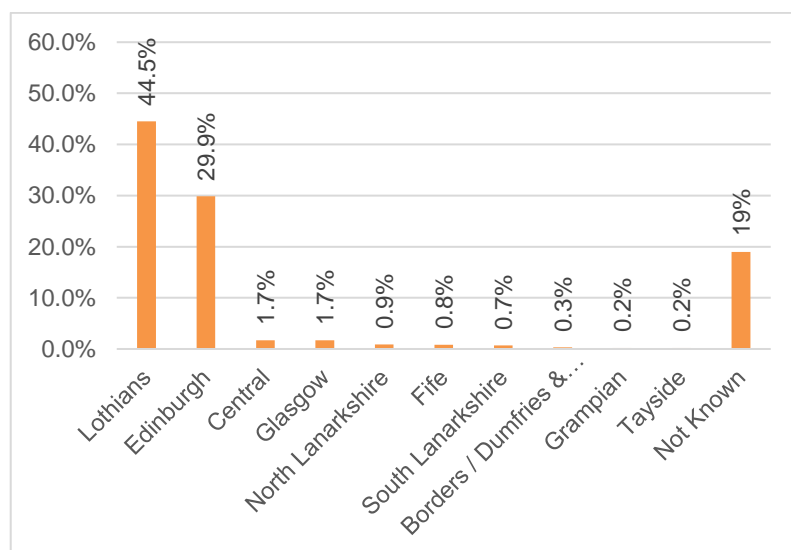


Figure 3-11: Percentage of employed adults in the Lothians who work in the Lothians and other council areas (2015-2019 combined)

3.2.26 The above graph suggests that there was a high proportion of out commuting from the Lothians to Edinburgh over the period covered by the data, with around 30% of employed people living in the Lothians commuting into the capital for work.

3.2.27 While also based on the pre-COVID-19 position, data recorded via the public survey undertaken to inform the SEStran RTS also indicates that there are high levels of out commuting from Midlothian to Edinburgh as well as smaller numbers of trips to both East Lothian and the Scottish Borders.

3.2.28 The high rates of out-commuting as recorded via the above sources is reinforced by the high rates of economic activity in Midlothian and the most recent jobs density data (2021) which suggests a job density figure of 0.64 – i.e., there are 0.64 jobs in Midlothian for every Midlothian resident of employment age, so fewer jobs than people. This implies that the place of employment for a proportion of workers is based outside of the local authority area. Job density in Midlothian has remained relatively stable since 2013 fluctuating between 0.62 and 0.65, albeit with a decline in 2020 during the COVID-19 Pandemic, highlighting the authority's long-term dependence on out-commuting for employment.

3.2.29 While the above commuting data pre-dates COVID-19 and the higher rates of hybrid and home working since the pandemic, it is likely that a large proportion of Midlothian residents continue to travel into the city for work for at least some of their working week.

**Key point:** There are fewer jobs than people in Midlothian. Despite changes in travel since COVID-19, a high proportion of residents in the local authority area therefore continue to commute out of Midlothian for work, with Edinburgh being a primary destination. There are also flows through Midlothian from the Scottish Borders to Edinburgh. This has important implications for transport demand and the development of the LTS, with a need to ensure that sustainable transport connections are provided to and from the capital.



## Industrial Structure

3.2.30 Figure 3-12 below shows the percentage employee jobs by industry in 2021 for Midlothian, the comparator local authorities, and Scotland overall. The main points from this graph area as follows:

- Around 30% of employment is in the public sector (Education, Public Administration and Defence, and Health) which is slightly higher than both East Lothian and West Lothian. Education accounts for the highest proportion of this, with particular concentrations of education employment around the University of Edinburgh Easter Bush Estate near Bilston and the Edinburgh College Campus in Bonnyrigg. The presence of the Easter Bush Estate also likely contributes to a higher proportion of people in Professional, Scientific, and Technical roles in Midlothian than might be expected.
- In comparison to the Scottish average (10%), there is also a higher proportion of Retail jobs in Midlothian (11.8%). This can be attributed to the presence of a number of retail parks including the established Straiton Retail Park.
- Construction employment (10.3%) is also above the Scottish average (6%) and higher than each of the comparator areas (ranging from 2.8% -10.1%). The local authority also has a higher proportion (1.5%) of people employed in Property compared to both East Lothian (1%) and West Lothian (0.9%). These trends in part likely reflect the high level of development in Midlothian in recent years as discussed above.
- Overall, there is a high concentration of jobs in front-line employment which require travel to a workplace and / or shift work. This has implications for transport demand in Midlothian.
- In comparison to Edinburgh, there are fewer people employed in the Financial and Insurance and Information and Communication industries, with these roles typically centred

on the capital. These roles are typically higher paid and will likely attract workers from Midlothian, leading to out commuting to Edinburgh.

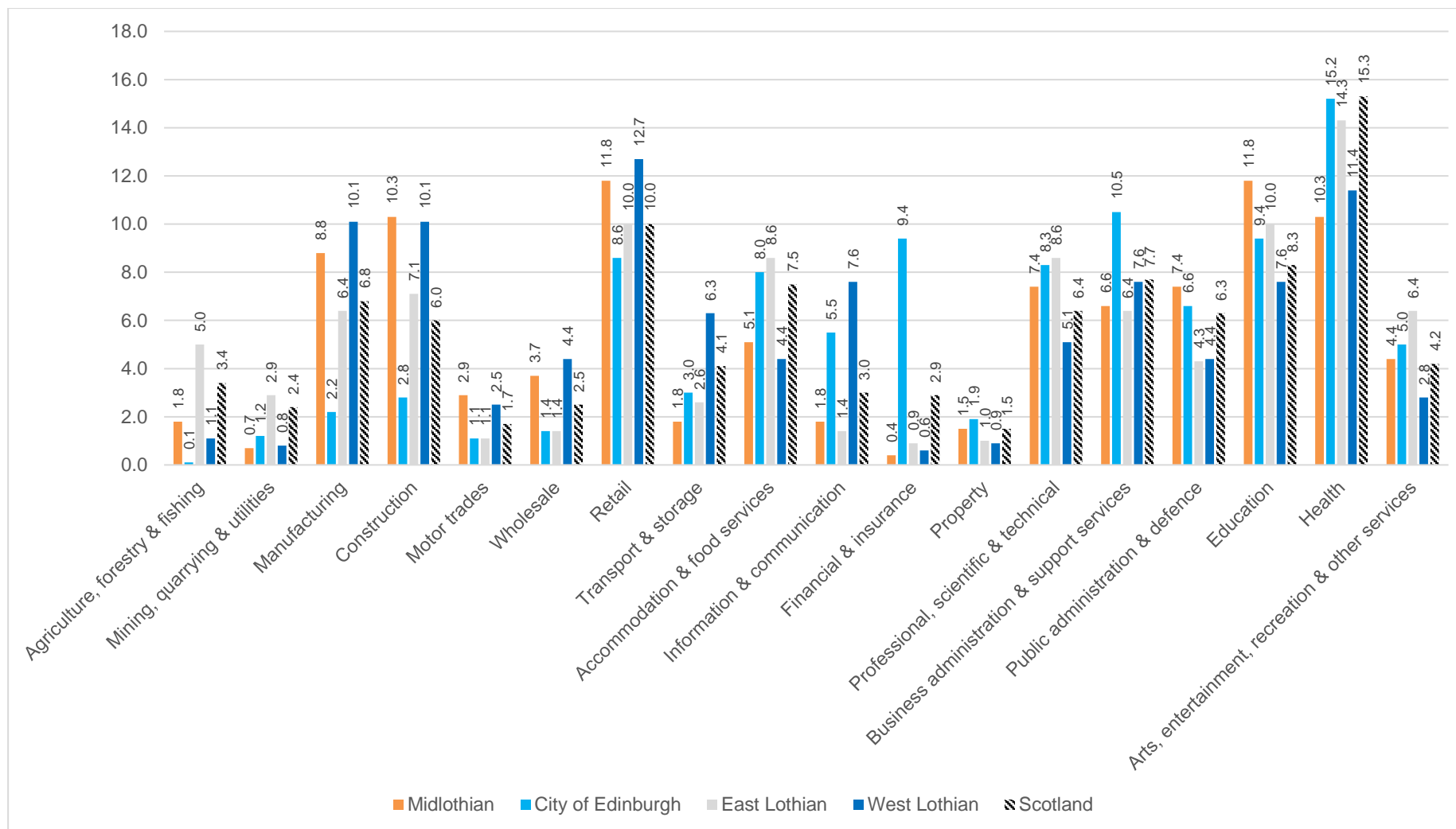


Figure 3-12: Percentage Employee Jobs by Industry 2021 (Source: BRES 2021)

### 3.3 Planning for the future

- 3.3.1 As discussed above, Midlothian's population has grown rapidly in recent years and, with significant housing development allocations, the population is projected to continue to increase over the lifetime of the LTS. This increase in population and the changing land use patterns will have a significant impact on transport demand. In light of this, this section sets out the scale of the planned development and considers its implications in terms of transport delivery.

#### Midlothian Local Development Plan

- 3.3.2 As discussed above, the current Midlothian LDP was adopted in November 2017 and Midlothian is currently preparing a new LDP which it is anticipated will be adopted in December 2026. In the absence of the new LDP, the discussion below sets out the extent to which the Strategy for Development outlined in the 2017 LDP has been delivered and considers the most up to date position with regard to housing and employment land supply in Midlothian.
- 3.3.3 The housing and employment allocations within the 2017 LDP were focused around three Strategic Development Areas (SDA) as follows:
- 1) **Shawfair Strategic Development Area** – a new town centre and housing and employment allocations at Shawfair
  - 2) **A7/ A68/ Borders Rail Corridor Strategic Development Area** – allocated housing in this area was spread across several communities (including at Redheugh, west of Gorebridge) with specific concentrations around the railway stations. Employment land allocations, and previous employment allocations, were identified in different communities, e.g. in the Dalkeith area. It was anticipated that there would be increased traffic on the A7 and, as a means to

improve bus use and pedestrian safety, an urbanisation scheme for this route was identified.

- 3) **A701 Corridor Strategic Development Area** – this area was intended to provide for a spread of new development with a number of existing communities expanded. There was a strong employment focus, including the continued expansion of the **Midlothian Science Zone (MSZ)**, further development to the west of the A701 at Straiton, and the development of a '**Midlothian Gateway**'. To help alleviate congestion, the plan identified the need for an **A701 relief road**.

- 3.3.4 The SDAs as outlined above are shown in Figure 3-13 which is taken from the 2017 LDP.

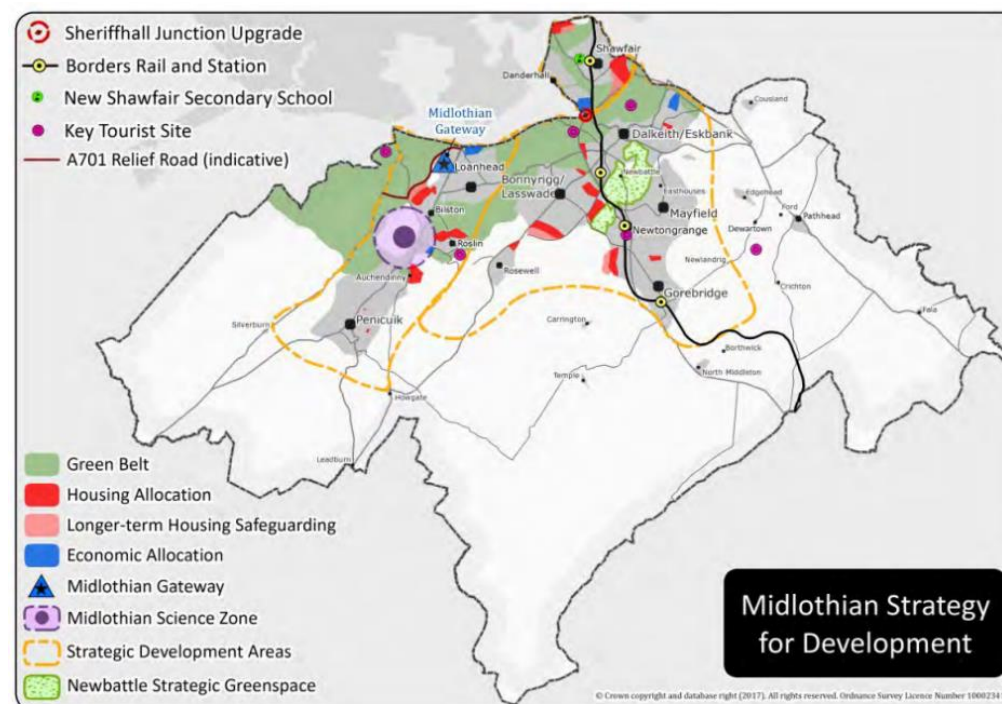






Figure 3-13: Midlothian Strategy for Development (Source: 2017 Midlothian Local Development Plan)

3.3.5 **The majority of the new housing and employment allocations included in the 2017 LDP were located on greenfield sites on the edge of settlements.** The document notes that this is because there were “*limited brownfield opportunities to meet the strategic land requirements*”. Furthermore, while the majority of the greenfield sites were on the edge of settlements, the document notes that “*a small number of additional housing development opportunities [are] outwith settlements*” and that these require “*measures to overcome sustainability, access and design concerns*”.

**Midlothian Housing Land Audit**

- 3.3.6 Midlothian Council produce a Housing Land Audit (HLA which sets out the most up to date published position with regard to housing land on an annual basis. The most recent HLA was approved by the Council in October 2023 and provides an update on the status of sites and sets out how much land is available, including both allocated sites (as set out in the 2017 LDP) and windfall sites (sites which were not allocated in the 2017 LDP).
- 3.3.7 Overall, the 2023 HLA identifies an effective land supply of 11,052 units as at 31<sup>st</sup> March 2023. The HLA includes 83 sites in its main schedule and a further ten that were completed in the audit year. The 83 sites can be broken down by status as follows:
- under construction (38 sites)
  - consented<sup>12</sup> or minded to consent (44 sites)
  - without consent (1 sites)

<sup>12</sup> With planning permission  
<sup>13</sup> Constrained sites are sites in the supply which are not effective and have obstacles preventing their development

3.3.8 Figure 3-14 shows the location of these sites across the local authority area along with the location of constrained sites<sup>13</sup>, safeguarded sites<sup>14</sup>, and sites which were completed during the period 2022-2023.

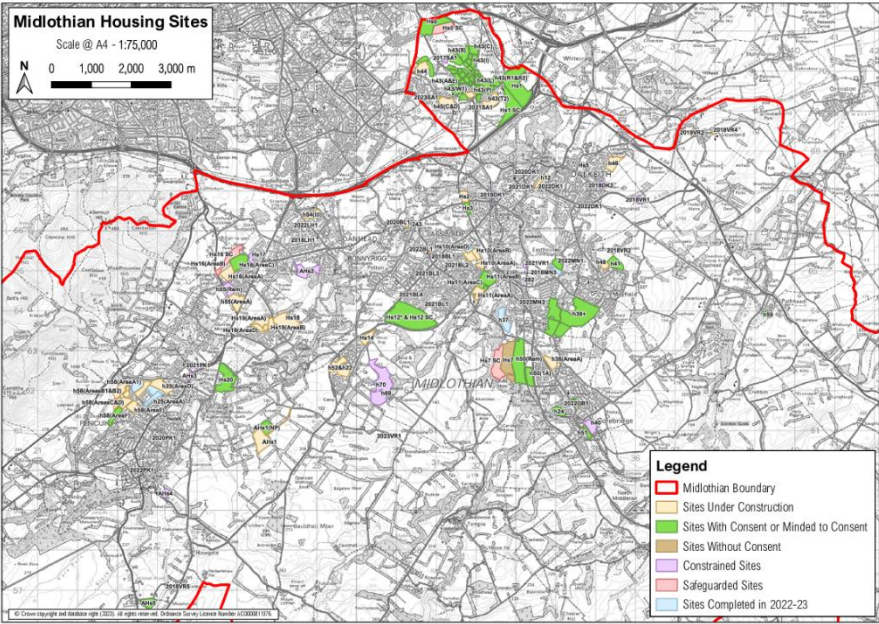


Figure 3-14: Location of Midlothian’s housing sites (Source: Midlothian Housing Land Audit 2023)

3.3.9 As with the sites allocated within the LDP, while some of the sites which make up the effective land supply are on brownfield land, **the overwhelming majority are in greenfield locations**, with greenfield sites accounting for 67 of the 93 sites (72%) and 89% of the total area.

<sup>14</sup> Safeguard sites are sites associated with housing allocations which have potential for further expansion in the medium to longer term and which could be brought forward through the next development plan, if required

**Key point:** The majority of identified sites in the housing land supply are in greenfield locations. The dominance of greenfield sites has implications for transport delivery with development in greenfield locations leading to spatial expansion and reduced density which can in turn make sustainable transport provision more challenging. Indeed, there is evidence that new greenfield residential development can lock in car dependency from the outset<sup>15</sup>. It is this dependency on car travel which the LTS must seek to overcome.

### Midlothian Employment Land Audit

- 3.3.10 Similar to the HLA, Midlothian also produce an Employment Land Audit (ELA) which provides the most up-to-date position with regard to the supply and availability of employment land in Midlothian on an annual basis. The 2023 ELA is the most recent publication. In total, this identifies 48 employment sites, equating to a total area of 593ha. Figure 3-15 shows the location of these sites across the local authority area and the table below provides a breakdown of the sites and vacant land (ha) available by settlement. As indicated, the most significant areas of employment land are around Loanhead (10 sites, 152ha), Shawfair / Danderhall (5 sites, 147ha), and the MSZ (11 sites, 124ha).

Table 3-1: Employment land supply breakdown by settlement (Source: Midlothian Employment Land Audit 2023)<sup>16</sup>

Settlement	Number of sites	Gross Site Area (ha)
Bonnyrigg*	4	20.6
Dalkeith	7	68.7
Easthouses	1	1.8
Gorebridge	1	9.8
Loanhead*	10	152.4
Mayfield	1	23.8
Newtongrange	3	25.8
Penicuik	2	7.0
MSZ	11	124.2
Rosewell	1	1.8
Roslin	2	10.3
Shawfair/Danderhall	5	147
Total	48	593.2

<sup>15</sup> see <https://www.theguardian.com/society/2022/feb/07/new-greenfield-housing-forcing-people-to-use-cars-report-finds>

<sup>16</sup> Note: \*indicates that this settlement's figures include both committed/allocated sites and also other economic sites with planning support

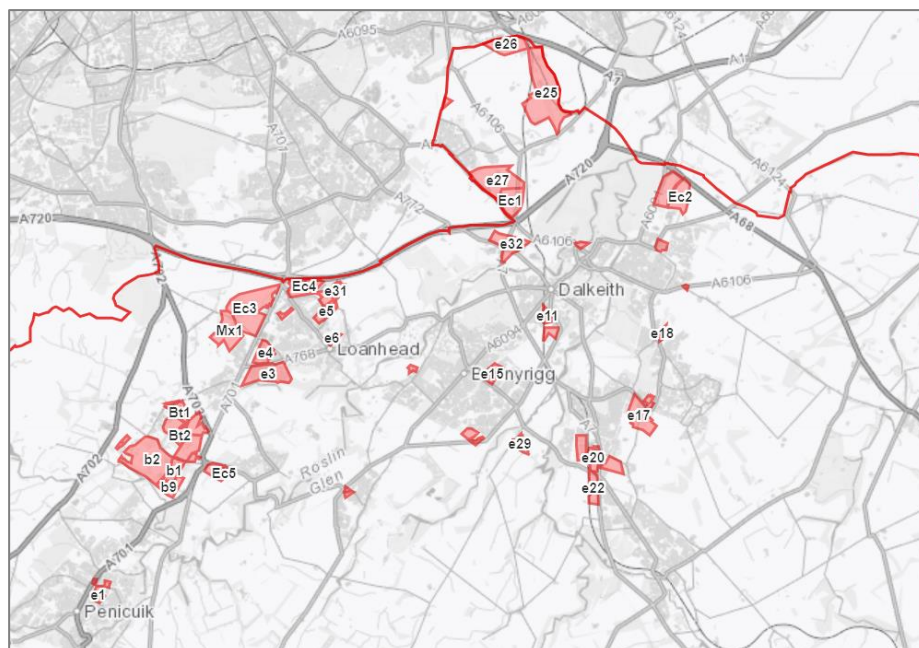


Figure 3-15: Location of Midlothian's employment sites (Source: Midlothian Employment Land Audit 2023)

## Future Development

- 3.3.11 As discussed in Chapter 2, NPF4 sets out the MATHLR (minimum number of housing units that is to be provided in each planning authority in Scotland for a 10-year period) for each planning authority in Scotland. The MATHLR is designed to run concurrently with the lifespan of each planning authority's new LDP. In Midlothian, this would mean it would apply from 2026 to 2036 (assuming Midlothian adopts a new MLDP in 2026 as indicated in the current Development Plan Scheme). It is noted that the MATHLR is a minimum

<sup>17</sup> These may come from existing safeguarded sites, new allocations, or additional windfall sites (sites that are not allocated for housing development in the MLDP) entering the supply.


value and, it is expected that the value will be exceeded in each planning authority's LDP.

- 3.3.12 The MATHLR for Midlothian as well as the other local authorities in the SEStran region along with the percentage increase the MATHLR represents on the 2022 housing stock is shown in Table 3-2. As shown, as a proportion of existing dwellings, **the MATHLR for Midlothian is considerably higher than that of all other local authorities in the SEStran region, equating to a 20% increase in the number of homes.**

Table 3-2: Minimum All-Tenure Housing Land Requirement for Midlothian (Source National Planning Framework 4)

Local authority	Housing land requirement	Total dwellings (2022)	Local authority
City of Edinburgh	36,750	261,000	14%
East Lothian	6,500	51,409	13%
Fife	7,300	181,405	4%
Midlothian	8,850	43,213	20%
Scottish Borders	4,800	59,557	8%
West Lothian	9,850	83,624	12%

- 3.3.13 This rate of increase is very significant. However, it does not provide the full picture. Of the 11,052 units identified in the HLA, 2,528 are programmed to be built by 2026, meaning that around 8,524 would remain at the time of the adoption of the new LDP and therefore an additional 326 units<sup>17</sup> will be needed to meet the MATHLR target. In total, when taking into account the sites to be delivered in the current plan period, and those which need to be delivered over the period 2026-



2036 to achieve the MATHLR, **Midlothian will therefore see a minimum growth in housing units of 11,378 (26% of the total dwellings in Midlothian in 2022) by 2036.**

**Key point:** The level of development planned in Midlothian is considerable, with the number of houses set to increase by over 26% by 2036. This rate of increase will have significant implications for transport demand. High rates of development have the potential to result in high volumes of car traffic which would place significant pressure on key transport corridors across the local authority area. Furthermore, many of the residential sites identified are in greenfield locations, creating additional challenges in terms of the provision of sustainable transport options. In order to avoid increased car traffic, it is essential that the LTS prioritises both reducing the need to travel unsustainably and the delivery of new and improved public and active travel connections between the planned new developments and key trip attractors.



## 4 Approach to Identifying Transport Problems and Opportunities in Midlothian

### 4.1 Problem Identification

4.1.1 An LTS has a potentially wide range of problems to address which can be relevant both now and in the future. Adopting a structure to organise and make sense of these problems is essential to create order and avoid fragmentation and omissions in the process.

4.1.2 The **Problems Framework** sets out the various aspects which define a transport trip for both all modes of travel and for public transport services specifically. All of the transport problems typically encountered by people fall into one of these categories. These are:

■ **Applying to all modes of travel:**

- awareness of travel options (journey planning / information)
- cost of travel
- environmental concerns – that people have with using some modes of travel
- fuel / power issues
- integration of travel to onward travel modes (e.g. bike to train, car to bus P&R)
- journey information (during the journey)
- journey quality
- journey times

- personal accessibility – being able to access transport networks and services specifically from a disability / protected group perspective
- personal security (fear of crime)
- reliability of journey times (including public transport service punctuality)
- safety (transport)

■ **Applying to only public transport more specifically:**

- Capacity – ability to get on / get a seat
- Comfort – passenger comfort
- connectivity / network coverage – availability of public transport services
- integration between services (within mode, e.g., bus to bus)
- service reliability (cancellations and punctuality)
- timetables (times of first and last services / frequency)
- long term uncertainty around services

4.1.3 The above framework is used in the following chapters as a 'checklist' to develop a set of current and future transport problems for each transport mode in the Midlothian context. Given the local nature of the strategy, problems are identified spatially where possible.

4.1.4 For each problem, the supply side causes (i.e. the issue with how transport is provided which results in the problem) are then identified. This step is important as the supply side cause will provide the basis for the generation of policies and actions in the LTS.

4.1.5 Each of the transport problems identified can have a **consequence in terms of travel behaviour** by:

- Adding cost or inconvenience to any trip – adding to the cost of travel, journey times / journey time reliability and / or impacting on health, education, and wellbeing
  - Meaning that people travel by a different (often less sustainable) mode (or they are forced to through lack of alternatives)
  - People not making trips with a range of consequences for them and society more generally
- 4.1.6 These travel consequences will in turn have a range of **negative societal consequences, including** impacts related to:
- Inequalities
  - Climate
  - Inclusive economic growth
  - Health and wellbeing
- 4.1.7 The chapters which follow take each mode of transport in turn, and set out:
- a detailed baseline of current transport provision and an analysis of available data on transport demand and travel patterns by that mode
  - the range of potential problems that (i) people may experience when travelling by that mode which impacts that journey or (ii) that prevent people travelling by that mode at all, or travelling as frequently as they would like
- 4.1.8 Where possible, the transport problems identified using the above Problems Framework have been corroborated with data analysis and / or feedback via stakeholder engagement undertaken to inform this strategy (see Appendix B as well as the outputs from previous public engagement activities,

including the outputs from the public survey undertaken in 2021 to inform the development of the SEStran RTS and the outputs from the public survey undertaken in 2021/2022 to inform the development of Midlothian Council's emerging Active Travel Strategy (ATS) 'On the Move Midlothian: Our Active Travel Strategy For Everyone' which is scheduled to be published in summer 2024.

- 4.1.9 As set out in Chapter 1, the next stage of work involves **an online public survey** which aims to ensure the full range of problems (and any opportunities) relating to transport in Midlothian are captured and gather any thoughts on the emerging Strategy Outcomes. The findings from this will then be used to inform the subsequent stages of the LTS development process (Stage 3 - choosing options and Stage 4 - the preparation of the LTS document itself.



## 5 Active Travel

### 5.1 Active travel provision

#### Existing connections

5.1.1 The existing active travel network in Midlothian is shown in Figure 5-1. As shown, Midlothian has four existing long distance cross boundary cycle routes which cross into adjoining local authority areas as follows:

- **National Cycle Route 1 (Newcastle to Edinburgh)** – this route is approximately 25km in length and is a mix of on-road and off-road provision. From its southern extent, the route is on road following the B7007, B6372, B704 as well as a number of more minor routes past Middleton, Temple, Carrington, and Bonnyrigg. At Bonnyrigg, the route changes to mainly off-road towards Dalkeith via Dalkeith Campus, continuing off-road towards Whitecraig in East Lothian and onto Edinburgh.
- **National Cycle Route 196 (Penicuik to East Lothian via Dalkeith)** – this route is approximately 16km in length and is mostly off-road. The route begins at Valleyfield in Penicuik and extends eastwards through Auchendinny, Roslin Glen, Rosewell, Bonnyrigg, Eskbank, and Dalkeith.
- **Eskbank to Gilmerton** - a combination of on-road cycle lanes along Melville Road and segregated cycleway along Gilmerton Road connects with the existing cycleway along Gilmerton Road in Edinburgh
- **Roslin to Shawfair** – this route connects Roslin, Loanhead, Straiton Pond Local Nature Reserve, Millerhill and Shawfair Railway Station. The route is primarily off-road and for part of

its length follows the line of the former railway line to Shawfair.

- 5.1.1 The **A720 City Bypass creates significant severance across the north of Midlothian**. The Eskbank to Gilmerton and Roslin to Shawfair routes both cross the bypass. However, while the latter uses the former railway tunnel, the former follows the road. In total, there five road crossing points, all of which experience high traffic volumes particularly during peak hours. Crossing the bypass by bike is therefore challenging and can act as a barrier to active travel uptake, particularly amongst new and less confident users.
- 5.1.2 In addition to the above cross boundary connections, there are also several shared use cycle routes (including on Old Dalkeith Road between Dalkeith and the Edinburgh City Bypass) and on-road cycle routes (including along the A701 between Penicuik and Straiton and along the A7 near Shawfair / Danderhall) in Midlothian.
- 5.1.3 Beyond these routes, there are a range of shorter connections within and between Midlothian's key localities. These are a mix of shared use cycleways / footways and Core Paths. The latter are defined as paths which are "sufficient for the purpose of giving the public reasonable access throughout the area<sup>18</sup>". While providing connections, Core Paths are not specifically designed for wheeling and cycling and are of varying quality, with many unsuitable for wheeled access.
- 5.1.1 In terms of local walking and wheeling trips, there are issues with pavement parking in several areas, especially in areas with rear parking / entrances. This can act to restrict access, particularly for those with mobility issues or visual impairments, or parents pushing prams and buggies. The Transport (Scotland) Act 2019 bans pavement parking, double parking and parking at dropped kerbs and Midlothian

<sup>18</sup> [Midlothian Core Paths | Midlothian Council](#)

Council is planning to begin enforcing this law during 2024. There is also a problem with there being too many guardrails in Midlothian which can restrict access. The council is in the process of removing guardrail in some locations.

- 5.1.2 Cycle parking is currently available in every Midlothian town centre and at every school and leisure centre. Covered cycle parking is also available at every railway station in Midlothian. Information on the number of cycle spaces at each railway station is set out in Table 6 5. There are no formal mobility hubs in Midlothian.

### Planned and committed schemes

- 5.1.3 There is a long-term aspiration to upgrade **Sheriffhall Roundabout** which is the only A720 at-grade junction. A preferred option for the scheme was identified in 2017 which includes dedicated grade-separated routes for non-motorised users (NMUs) through Sheriffhall Roundabout, with five subways providing connections to adjacent NMU routes on the A7 North, A7 South, A6106 Millerhill Road and A6106 Old Dalkeith Road<sup>19</sup>. In September 2021, the Edinburgh and South East Scotland City Region Deal Joint Committee ratified their support for the scheme, with £120m of City Region Deal funding committed for its delivery. However, STPR2 (published December 2022) did not specifically reference the scheme. In early 2023, a Public Local Inquiry to consider objections received to the proposed scheme was held and the independent reporter is now giving detailed consideration to all evidence before making recommendations to Scottish Ministers.

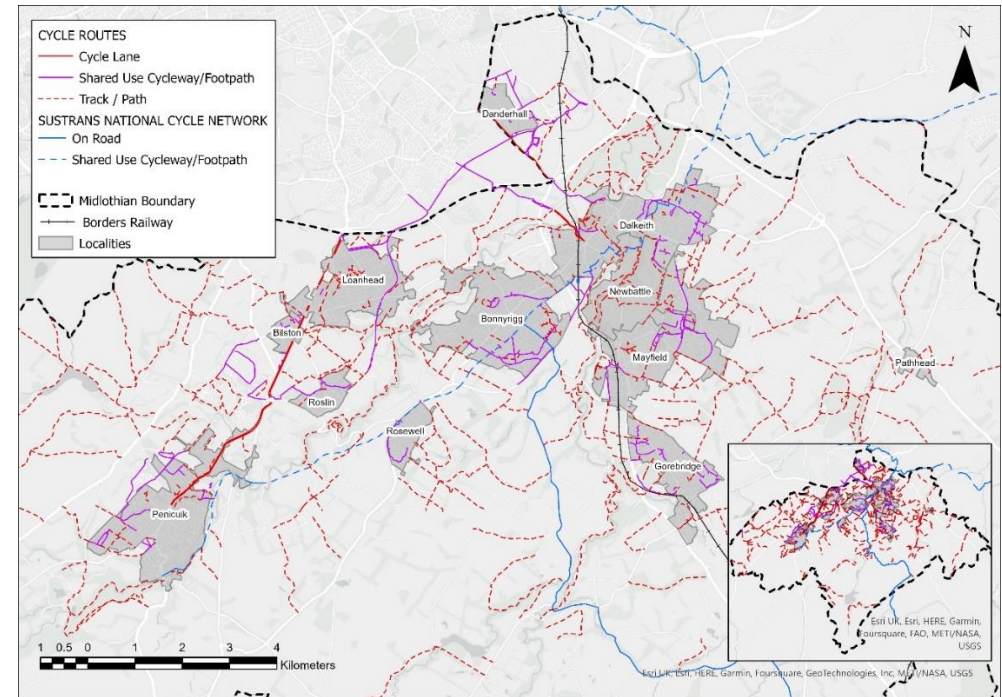


Figure 5-1: Midlothian existing active travel network

<sup>19</sup> See [a720-sheriffhall-roundabout-exhibition-panels-december-2019-final.pdf](https://transport.gov.scot/a720-sheriffhall-roundabout-exhibition-panels-december-2019-final.pdf) ([transport.gov.scot](https://transport.gov.scot/))



5.1.4 Beyond the above, in 2022, Midlothian Council was awarded Places for Everyone funding for three active travel projects, namely:

- **A7 Urbanisation Stages 0-2** – Stage 0 commenced in November 2023 and will look at the feasibility and potential design of active travel provision along the A7 between Gilmerton Road Roundabout and Dalhousie Road, Newtongrange.
- **Shawfair Connections Stages 0-2** – this project will commence in Q1 2024 and will consider priority routes for active travel infrastructure in the Shawfair area, with a particular focus on connections into the existing network and cross-boundary connections linking into active travel networks in other Local Authorities where possible.
- **Designing and Aligning Midlothian's Strategic Place with Active / Sustainable Travel** - Midlothian council is working with the charity Living Streets to complete an assessment of active / sustainable travel provision within and around new developments. The project will assess how sustainable travel can be made easier and more appealing through best-practice design and greater provision of infrastructure within and between areas of new development, with a focus on the design of new housing areas and the provision of local services within new development. The outcome of this study will inform future policy principles and design standards for new developments and help ensure that the choice of new housing sites encourages people to walk, wheel, cycle, or use public transport as far as possible.

5.1.5 Other work streams currently being progressed by Midlothian Council are set out below. It is noted that some of these projects are at a very early stage and may not be progressed:

- A feasibility study examining whether there is potential to extend the NCN196 from Penicuik south to Leadburn is being undertaken.

- Midlothian Council is awaiting the outcome of several applications for Places for Everyone Funding to deliver Stage 0-2 projects on potential schemes in the areas listed below. Stages 0-2 involves broadly defining the scope of a project and its desired outcomes as well as stakeholder engagement and the development of high-level costs.
  - Provision along the A703 from Easter Bush / Beeslack / Gowkley Moss to the junction with the A702 at Hillend, and onwards to Edinburgh via Fairmilehead.
  - connections into Dalkeith which will address journeys to Eskbank including Eskbank Toll roundabout.

5.1.6 Midlothian Council is also currently producing an update to the 2018-2021 ATS which is scheduled to be published in summer 2024. An overview of some of the outputs from the engagement activities undertaken to inform the development of the new ATS is provided in Section 5.4.

## 5.2 Active travel demand

5.2.1 Data on active travel demand in Midlothian is relatively limited. Currently, Strava Metro, a database of cycle trips developed from those recorded by Strava users, provides the most comprehensive source of data on cycling. However, it should be noted that Strava users are more likely to be 'committed' as opposed to 'casual' cyclists, with less frequent users and women less likely to record trips via Strava. The data is therefore not definitive.

5.2.2 Figure 5-2 shows the level of cycling trips in Midlothian across the calendar year from 2019 to 2023 inclusive as recorded via Strava Metro. Data for 2023 covers the period January to July only.

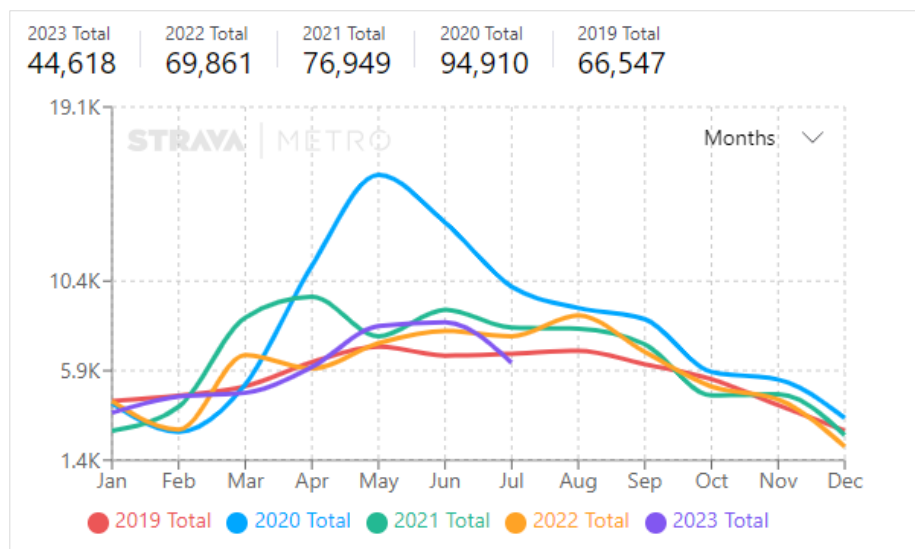


Figure 5-2: Trip counts by month (2019 - 2023)

- 5.2.3 As would be expected, there is a seasonal pattern to cycling trips with higher numbers during the warmer months. Due to the COVID-19 pandemic trips were significantly higher in 2020, with 2023 levels returning to something similar to 2019 albeit numbers were higher in May / June compared to the equivalent period in 2019. Figure 5-3 shows the age profile of those making cycling trips recorded in Midlothian via Strava Metro in 2023.

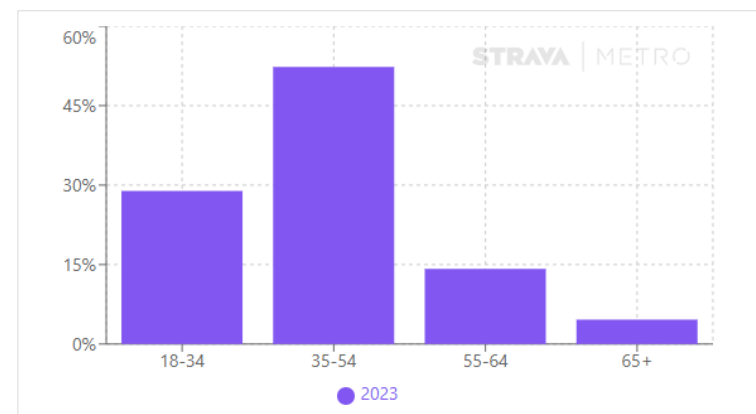


Figure 5-3: Age profile of Strava users in Midlothian (2023)

- 5.2.4 The 35 to 54 range dominates, accounting for over 50% of Strava cyclists. This reflects the age profile of the general population as shown in Figure 3-2 with a higher proportion of people in the middle-age age bracket.
- 5.2.5 Reflecting wider trends, the data from Strava Metro also suggests that there has been a considerable growth in the use of e-bikes in Midlothian in recent years, with the proportion of e-bike rides more than doubling between 2019 and 2023, albeit from a relatively low base (see Figure 5-4 and **Error! Reference source not found.**).

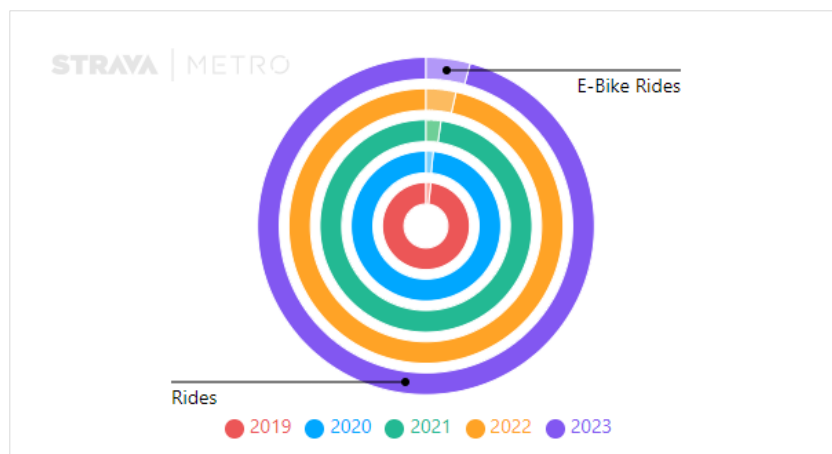


Figure 5-4: Split between rides undertaken on e-bikes and those undertaken on standard bikes - 2019 to 2023

5.2.6 Figure 5-5 and Figure 5-6 show 'Strava Heat Maps' for cycling and walking / running / hiking respectively based on data from February 2023 to January 2024. The dark

purple lines indicate lowest levels of activity while the white lines indicate the highest levels of activity.

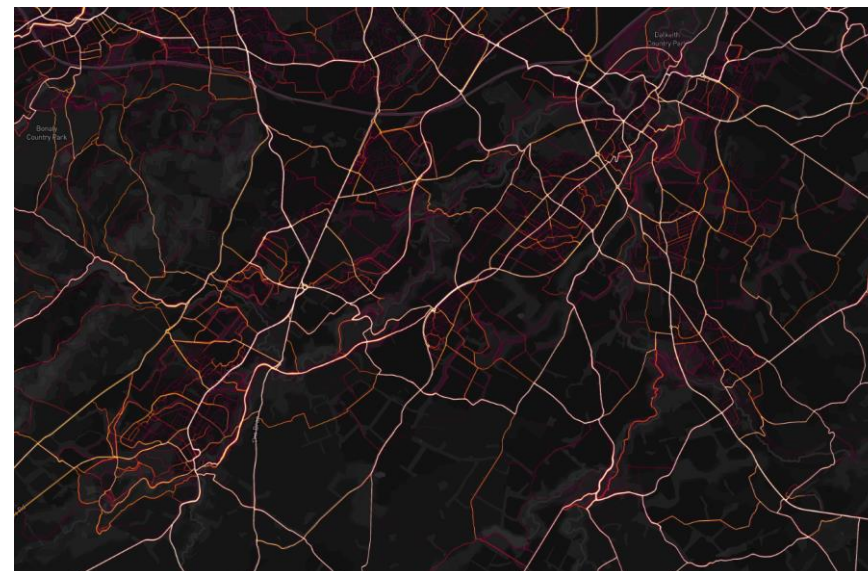


Figure 5-5: Strava Metro Heat Map - Cycling

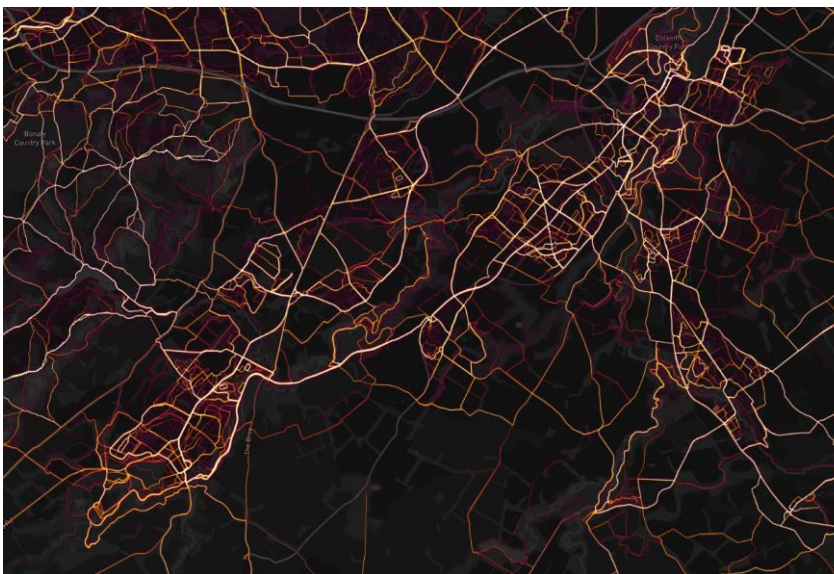


Figure 5-6: Strava Metro Heat Map – walking / running / hiking

- 5.2.7 The cycling heat map shows higher levels of activity between the main towns including along a number of Midlothian's off road cycling routes, including the National Cycle Routes and the Roslin to Shawfair path.
- 5.2.8 A similar pattern is evident for walking / running / hiking although as would be expected there is greater activity within the towns and residential areas.

### 5.3 Active travel collisions

- 5.3.1 Pedestrians and cyclists are recognised as 'vulnerable' road users and one of the key issues which deter people from cycling is safety concerns (see 0). The Department for Transport (DfT) publishes road casualty statistics on an

annual basis, including data on the number of collisions involving active travel users. This data is collated from STATS19 data<sup>20</sup> and **relates only to collisions which have been reported and involve a personal injury**. Near-misses or non-reported collisions are therefore not shown. Each collision is classified into one of three severity ratings based upon the most severely impacted casualty (fatal, serious, or slight).

- 5.3.2 Figure 5-7 and Figure 5-8 show the location of collisions involving pedestrians and cyclists in Midlothian between 2013 and 2022 based on this data, with the colours in each case indicating the casualty severity rating.
- 5.3.1 In total, there were 198 collisions involving pedestrians and 97 collisions involving cyclists during this period. While the majority of casualties involved had injuries which were classified as slight or serious, there were five pedestrian and two cyclist fatalities.

<sup>20</sup> see <https://www.gov.uk/government/publications/stats19-forms-and-guidance>



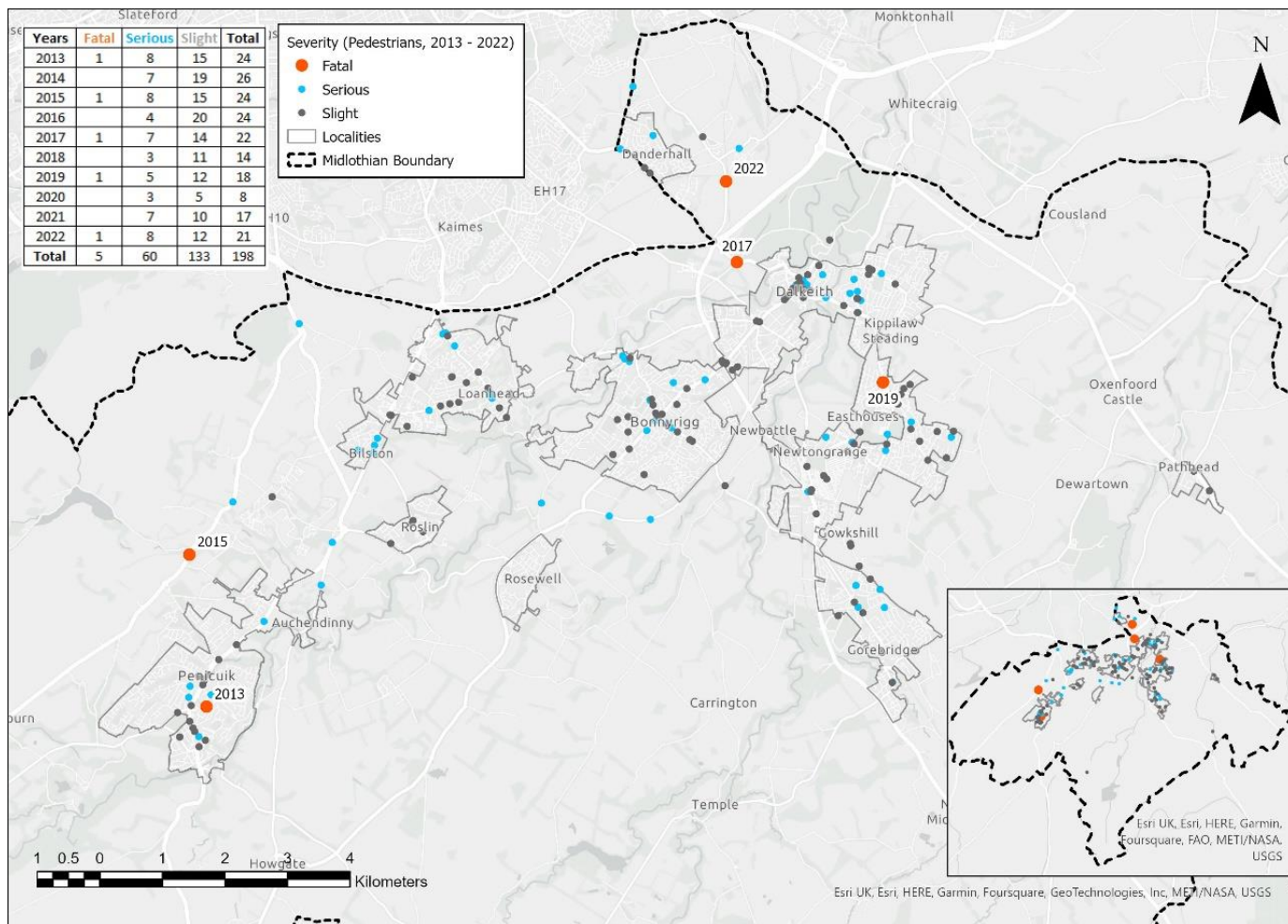


Figure 5-7: Collisions involving pedestrians between 2013 and 2022 by casualty severity

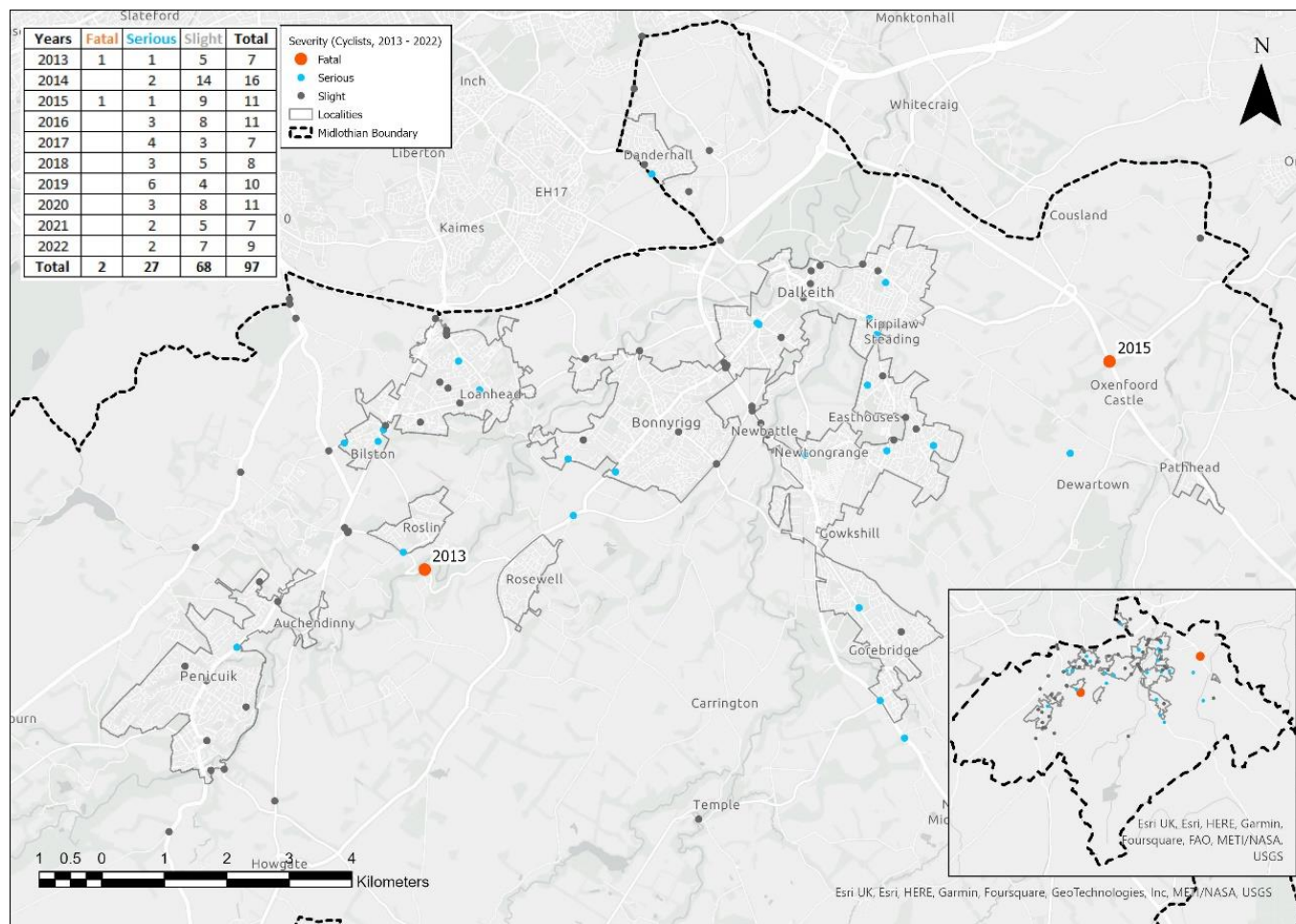


Figure 5-8: Collisions involving cyclists between 2013 and 2022 by casualty severity



# 5.4 Findings from previous public engagement activities

5.4.1 Figure 5-9 and Figure 5-10 show the levels of satisfaction with walking and cycling respectively amongst Midlothian respondents to the 2021 public survey undertaken to inform the SEStran RTS. The question on cycling was directed only to those who stated that they travel by bike in a typical month.

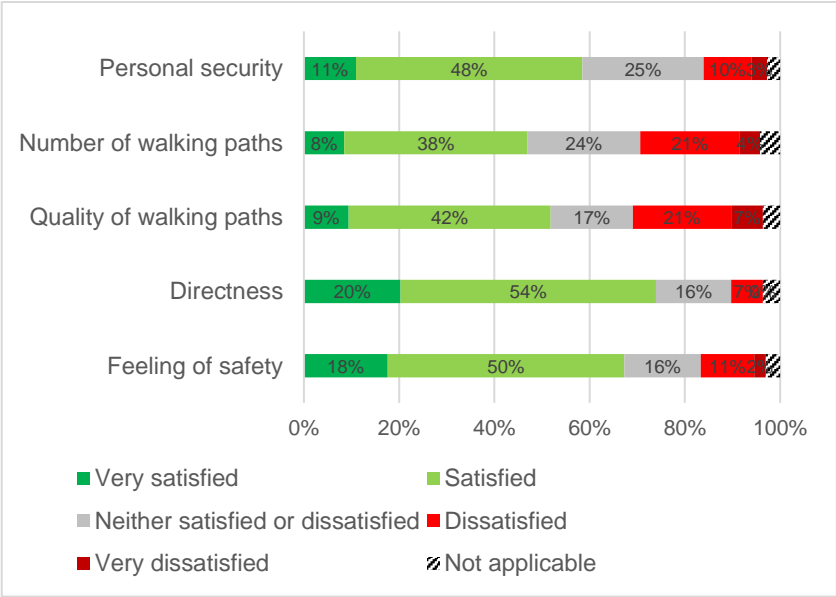


Figure 5-9: Satisfaction with walking prior to the Pandemic (n=330) (Source: SEStran Regional Transport Strategy Public Survey 2021)

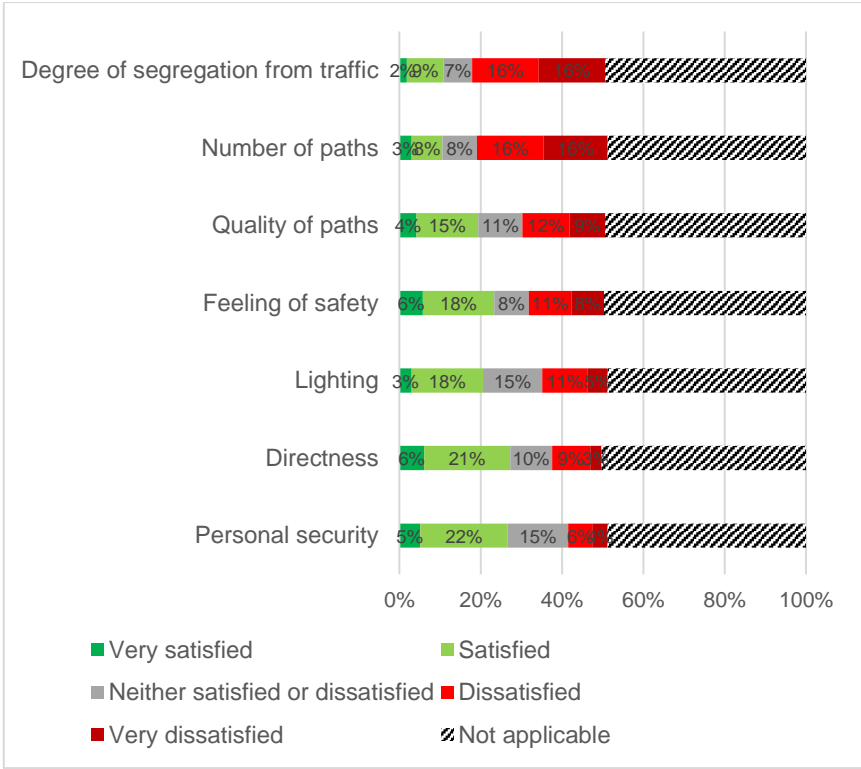


Figure 5-10: Satisfaction with cycling prior to the Pandemic (n=330) (Source: SEStran Regional Transport Strategy Public Survey 2021)

5.4.2 In terms of walking, the highest level of dissatisfaction was with the 'quality of walking paths' with 28% of respondents indicated they were dissatisfied. With respect to cycling, the highest levels of dissatisfaction were with the 'degree of segregation from traffic' with 64% of respondents indicating that they were dissatisfied with this aspect. There was also a high level of dissatisfaction with the number of paths available (63% dissatisfied), the quality of paths (41% dissatisfied), and the feeling of safety (37% dissatisfied).

- 5.4.3 Where respondents indicated they were dissatisfied with certain aspects, they were also invited to provide further comments if they wished. The key points raised relating to walking and cycling are set out in Table 5-1.

Table 5-1: Additional comments made by Midlothian respondents to the SEStran RTS Survey who indicated that they were dissatisfied with walking and cycling

Walking	Cycling
<ul style="list-style-type: none"> <li>- too few well-maintained paths</li> <li>- cyclists travelling too fast on shared paths</li> <li>- cars ignoring speed limits making footways dangerous</li> <li>- anti-social behaviour on paths</li> <li>- poor parking and a lack of crossing places, making it more difficult for those in wheelchairs / using mobility scooters</li> </ul>	<ul style="list-style-type: none"> <li>- a lack of segregated cycle paths</li> <li>- cycle paths not being joined-up</li> <li>- driver behaviour making the road dangerous</li> <li>- poor road surface quality</li> </ul>

- 5.4.4 As discussed above, to help inform the development of the new ATS, Midlothian Council completed an extensive stakeholder and public consultation exercise between December 2021 and March 2022. This included the following activities:

- Stakeholder engagement - a series of stakeholder workshops and a stakeholder online survey
- Public consultation - a virtual consultation room which allowed visitors to review the existing strategy, along with interactive mapping of aspirational active travel routes in Midlothian, and an online survey

- School engagement - a separate online survey for school pupils, parents / guardians and teachers

- 5.4.5 A summary of the key problems with respect to active travel identified via these activities is provided below.

- Lack of cohesive network, indirect routes, and confusion over primary use of paths
- Poor active travel links between destinations
- Lack of segregated cycle paths
- Lack of safe crossing points for active travel, including at large roundabouts such as the Sheriffhall and Eskbank roundabouts
- High traffic speeds and volumes
- Accessibility issues for those with a disability
- Narrow footway provision and widths
- Physical barriers along routes
- Lack of public facilities (e.g. toilets, benches etc)
- Maintenance and poor condition of routes
- Insecure cycle parking at schools
- Safety concerns about walking to schools alongside busy roads
- Car parking being a safety issue in and around many schools in Midlothian
- Antisocial behaviour



- 5.4.6 The above findings along with the results of the Stakeholder Engagement undertaken to inform the development of this Stage 1&2 Technical Report (see Appendix B) have been used to help populate the problems framework as detailed below and will be a vital input into the subsequent option development process.



## 5.5 Problems Around Walking, Wheeling and Cycling in Midlothian

Walking and Wheeling		
Problem Theme	Transport Problem	Supply Side Cause(s)
Awareness of travel options	I do not know where safe and or accessible walking / wheeling routes are	- Lack of / poor quality / inappropriate information on active travel routes, particularly for protected groups
Cost of travel	<i>No problems identified</i>	
Environmental concerns	<i>No problems identified</i>	
Fuel / power issues	<i>No problems identified</i>	
Integration of travel to onward modes	Walking / wheeling links to my local bus stop / railway station are poor	<ul style="list-style-type: none"> <li>- Walking links between nearest bus stops and Midlothian's rail stations are poor e.g., walking link between Tesco in Eskbank and the railway station has poor visibility and is not sufficiently wide</li> <li>- Difficulty accessing public transport in some new development locations / lack of dedicated mobility hubs</li> <li>- Absence of paths or footways requiring the user to walk on the road</li> <li>- footways being too narrow</li> <li>- Absence of lighting</li> <li>- Lack of suitable road crossing facilities</li> <li>- Obstacles on footway</li> <li>- Quality of streetscape</li> <li>- Quality of surfacing</li> <li>- Poor road sightlines</li> <li>- Narrow roads</li> <li>- Steps on routes</li> </ul>
Journey information	I do not feel confident using walking / wheeling routes that I am unfamiliar with	Lack of / poor quality signage on active travel routes
Journey quality	I don't think my local environment is suitable for walking and wheeling	<ul style="list-style-type: none"> <li>- Absence of paths requiring the user to walk on the road / across car parks</li> <li>- Absence of paths or footway to connect existing and planned communities / key destinations (e.g. Vogrie Country Park)</li> <li>- Absence of recreational walking opportunities</li> <li>- footways being too narrow</li> <li>- Intimidation caused by high traffic levels (including commercial vehicles) and speed, which will be exacerbated by traffic growth in Midlothian</li> <li>- Lack of suitable road crossing facilities</li> <li>- Obstacles on footway</li> <li>- Quality of streetscape</li> <li>- Quality of or absence of surfacing</li> </ul>



Walking and Wheeling		
Problem Theme	Transport Problem	Supply Side Cause(s)
		<ul style="list-style-type: none"> <li>- Narrow roads</li> <li>- Steps on routes</li> <li>- availability of seating / rest points</li> <li>- availability of public toilets</li> </ul>
Journey times	Walking takes too long	<ul style="list-style-type: none"> <li>- Longer journeys as a result of severance caused by major roads</li> <li>- Indirect walking and wheeling routes compared to crow fly</li> </ul>
Personal accessibility	Walking is not a realistic option for me because of a disability	<ul style="list-style-type: none"> <li>- Absence of suitable surfaced paths or footways for those with a disability</li> <li>- Paths being too narrow to accommodate wheelchairs / multiple users</li> <li>- Lack of appropriate enabling infrastructure including tactile paving etc</li> <li>- Obstacles on footway, visibility of obstacles</li> <li>- Parking on the footway in some locations (Note the council is planning to begin enforcing the ban on pavement parking in 2024)</li> <li>- Steps and other interruptions (e.g., gates) on routes</li> </ul>
Personal security (fear of crime)	I sometimes do not feel secure when walking / wheeling	<ul style="list-style-type: none"> <li>- Fear of crime in local environment</li> <li>- Lack of safe, well-lit, welcoming routes</li> <li>- Low levels of pedestrian and other activity</li> </ul>
Reliability of journey times	<i>No problems identified</i>	
Safety (transport)	I sometimes do not feel safe when walking / wheeling	<ul style="list-style-type: none"> <li>- Absence of paths requiring the user to walk on the road</li> <li>- Lack of segregation from traffic</li> <li>- High traffic speeds and intimidation by traffic</li> <li>- Lack of road crossing facilities</li> <li>- Location of road crossing facilities causes people to cross at more convenient, dangerous locations</li> </ul>

Cycling		
Problem Theme	Transport Problem	Supply Side Cause(s)
Awareness of travel options	I do not know where there are safe cycling routes near me	<ul style="list-style-type: none"> <li>- Lack of / poor quality information on active travel routes, particularly for protected groups</li> </ul>
Cost of travel	I cannot afford to own / maintain a bike suitable for me	<ul style="list-style-type: none"> <li>- Cost of buying and maintaining a bike</li> <li>- High cost of electric bikes</li> </ul>

Cycling		
Problem Theme	Transport Problem	Supply Side Cause(s)
Environmental concerns	<i>No problems identified</i>	
Fuel / power issues	I cannot charge my ebike away from my home	- There is a lack of public charging facilities for e-bikes
Integration of travel to onward modes	Cycling links to my local railway station are poor	- Absence of dedicated cycling facilities - Limited signage - The roads are not appropriate for cycling because of factors including traffic levels, mix of traffic, traffic speeds, speed limits, road width, road sightlines, lighting etc
	I cannot use my bike to take the bus	- Absence of secure bike parking at bus stops / lack of dedicated mobility hubs - Only Borders Buses operate specialised bike buses operating in the area - Bike spaces on Borders Buses are on a first come, first served basis - For other operators, carriage of bikes on buses at operator discretion and therefore not possible in all cases / guaranteed
	I cannot always take my bike on the train	- Limited capacity for taking bikes on Borders Railway services and places are non-reservable
	It does not feel safe leaving my bike at the railway station	- Absence of secure, and weatherproofed bike parking at Midlothian stations - Quality of secure and weatherproofed bike parking at Midlothian stations
Journey information	I do not feel confident using cycling routes that I am unfamiliar with	Lack of / poor quality signage on active travel routes
Journey quality	I don't think my local environment is suitable for cycling	- Intimidation caused by high traffic levels (including commercial vehicles) and speed, which will be exacerbated by traffic growth in Midlothian - Absence of traffic free paths to connect communities / attractions (e.g. lack of dedicated active travel facilities connecting Gorebridge to Vogrie Country Park) - Advisory cycle lanes not fit for purpose in places - Quality of cycle routes, continuity of standard, fragmentation, gaps in routes, lack of segregation etc. - Routes are poorly maintained - The road surface is poor in places with dangerous potholes - Traffic levels and speeds are intimidating - Poor road sightlines
	There is nowhere for me to securely park my bike at my destination	- Lack of secure bike parking facilities in the public realm
	I need to be presentable at work	- Lack of facilities (e.g., showers, lockers, cycle parking etc) at my workplace
	I do not like cycling up hills	- Costs and availability of electric bikes



Cycling		
Problem Theme	Transport Problem	Supply Side Cause(s)
		<ul style="list-style-type: none"> <li>- Cycling routes which are not defined to minimise the impact of gradients</li> <li>- Topography</li> </ul>
Journey times	Journey times by bike are too long	<ul style="list-style-type: none"> <li>- Indirect cycling routes required to avoid busy roads unsuitable for cycling</li> <li>- waiting times at signalised junctions or busy priority junctions</li> </ul>
Personal accessibility	Cycling is not a realistic option for me because of a disability	<ul style="list-style-type: none"> <li>- Cost of buying and maintaining a bespoke bike</li> <li>- Route constraints</li> <li>- Steps and other interruptions (e.g., gates) on routes</li> </ul>
Personal security (fear of crime)	I sometimes do not feel secure when cycling	<ul style="list-style-type: none"> <li>- Absence of other cyclists can lead to intimidation</li> <li>- Fear of crime or anti-social behaviour in local environment</li> <li>- Lack of safe, well-lit, welcoming routes</li> <li>- Poorly maintained routes (broken glass, overgrown vegetation, graffiti etc.) add to low amenity and an intimidating environment</li> </ul>
Reliability of journey times	<i>No problems identified</i>	
Safety (transport)	I sometimes do not feel safe when cycling	<ul style="list-style-type: none"> <li>- Absence of dedicated cycling facilities</li> <li>- Intimidation by noise and speed of vehicular traffic</li> <li>- Lack of segregation from general traffic</li> <li>- Lack of segregation from pedestrians</li> <li>- Requirement to cross major routes such as the A720, A7, A702 etc</li> <li>- Roundabouts on routes</li> <li>- Motorists not obeying on-road cycle lanes</li> <li>- The roads are not appropriate for cycling because of factors including traffic levels, mix of traffic, traffic speeds, speed limits, road width, road sightlines, lighting, motorists not obeying on-road cycle lanes etc</li> <li>- Unprotected right turns</li> </ul>

## 6 Public Transport

### 6.1 Connectivity analysis

6.1.1 Prior to examining bus and rail-based connectivity in Midlothian on an individual mode basis, this section considers public transport connectivity as a whole i.e., bus and rail connectivity combined. Recognising public transport's role in providing connectivity to key employment and service centres and the impact that limited public transport connectivity to these centres can have on communities, this section:

- reviews public transport connectivity to Edinburgh City Centre from locations in Midlothian
- examines the relative public transport connectivity to employment (jobs) in Midlothian and nearby local authorities from locations in Midlothian
- identifies areas where there is a correlation between high levels of deprivation and poor public transport connectivity to the 'source' of this deprivation (e.g., employment-related deprivation and poor public transport connectivity to jobs). The identification of these areas is important as improvements in public transport connectivity in these locations have the potential to lead to wide ranging positive impacts associated with reduced deprivation.

6.1.2 Each of the above bullets are discussed further below.

#### Public transport connectivity to Edinburgh City Centre

6.1.3 Figure 6-1 shows average public transport journey times between each postcode in Midlothian and Edinburgh City Centre (Princes Street) during the AM peak period (0600 - 1000) with green indicating postcodes with relatively short

journey times and red indicating postcodes with relatively long journey times.

6.1.4 As may be expected, journey times to Edinburgh City Centre are quicker from the main settlements as opposed to the more rural locations, with areas in close proximity to the main road corridors (and therefore key bus services) and the rail stations on the Borders Railway achieving the shortest overall journey times.

6.1.5 As outlined above, the level of development planned in Midlothian over the next 12 years is considerable and there is a risk that this development could result in high volumes of car traffic on the key transport corridors to Edinburgh and within Midlothian more generally. To overcome this challenge, it is essential that public and active travel connections are prioritised and that journey times via the former are competitive with those of car.

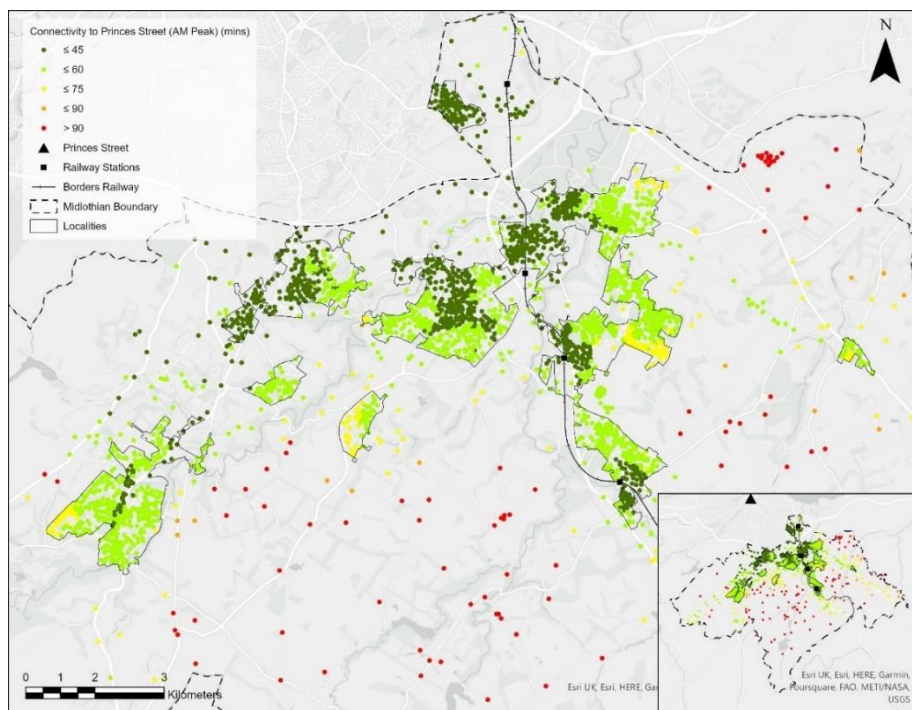


Figure 6-1: Connectivity to Edinburgh City Centre (Princes Street)

### Public transport connectivity to employment

- 6.1.6 To develop a detailed picture of levels of public transport connectivity to jobs, two 'Hansen' indicators were developed. Hansen indicators provide a measure of the relative connectivity (based on travel times) of a set of 'origins' to all possible 'destinations' in a defined study area, weighted by a chosen destination 'criteria' (in this case the number of jobs at the destination), with resulting high scores indicating good connectivity and low scores suggesting poorer connectivity. A decay-function is applied in the calculation such that opportunities at more distant locations (i.e., with a longer travel time) are 'valued' less than opportunities closer by.

6.1.1 The two Hansen indicators calculated were as follows:

- the mean Hansen indicator for each of Midlothian's postcodes to all jobs within Midlothian, the City of Edinburgh, Falkirk, Scottish Borders, East Lothian, and West Lothian local authority areas by public transport
- the mean Hansen indicator for each of Midlothian's postcodes to all jobs within Midlothian only

6.1.2 The results are shown in Figure 6-2 and Figure 6-3 respectively. In both images, areas with good public transport connectivity to jobs are shown in green and areas with poor public transport connectivity to jobs are shown in red.



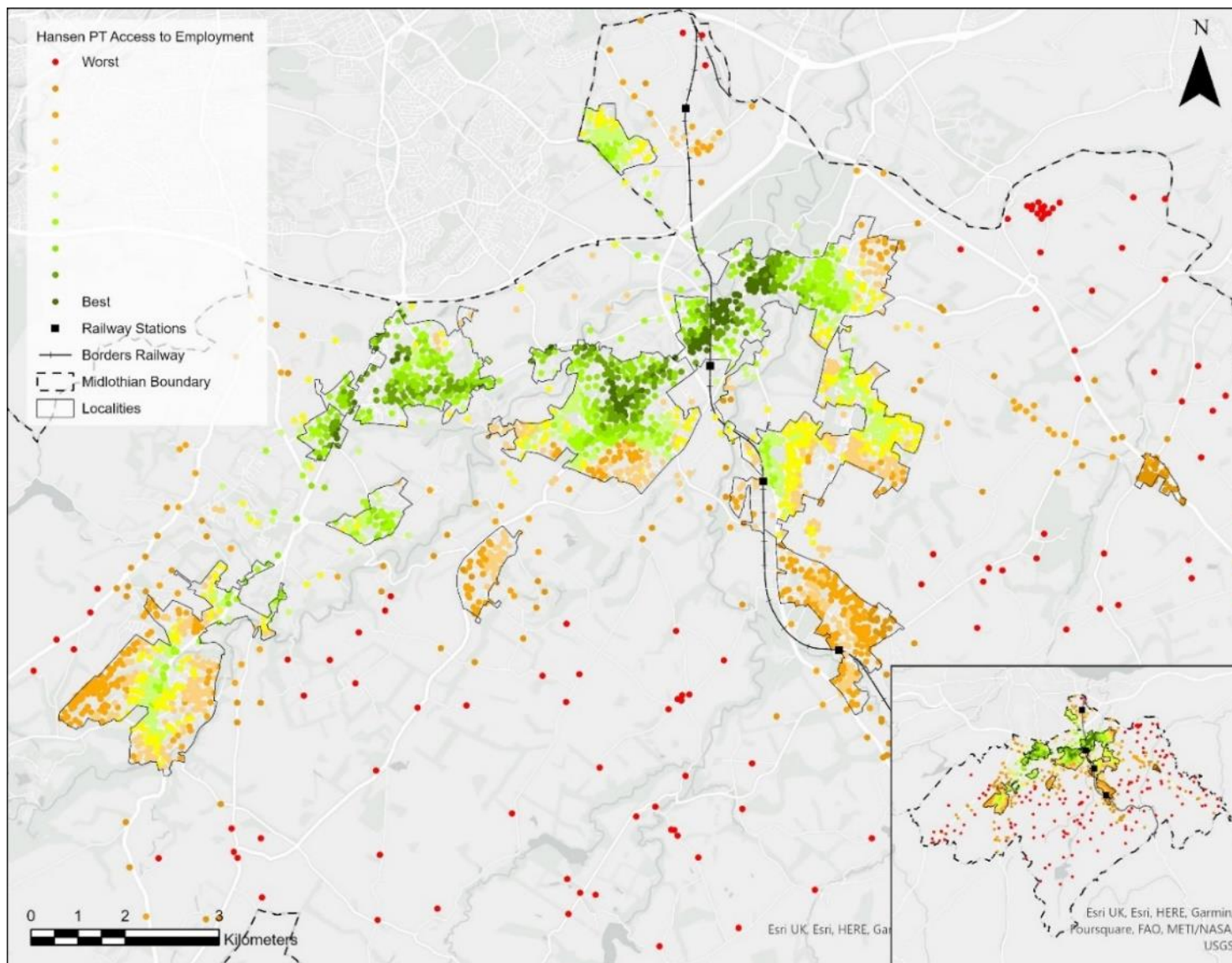


Figure 6-2: Connectivity from postcodes in Midlothian to Employment in Midlothian and the surrounding area



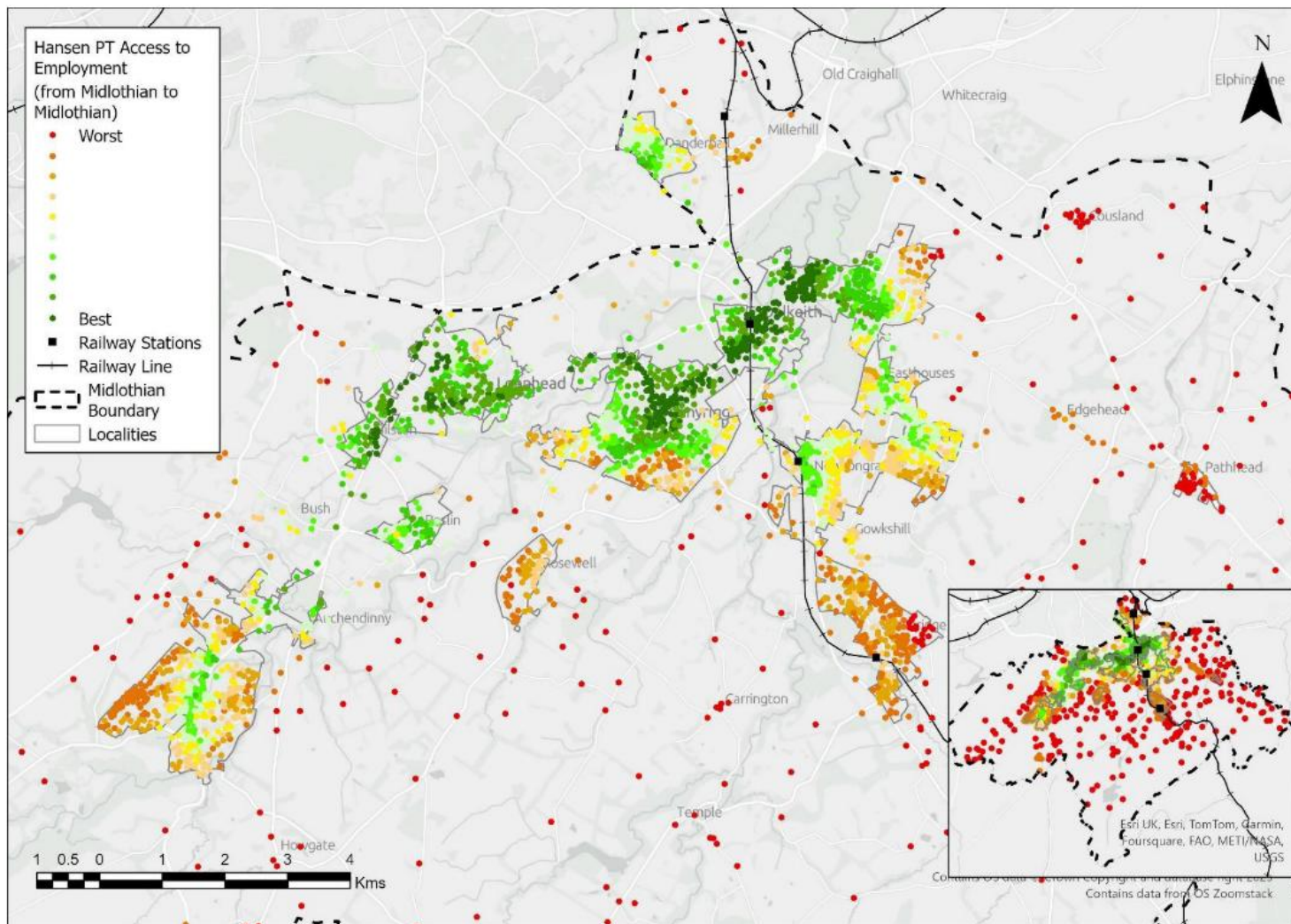


Figure 6-3: Connectivity from postcodes in Midlothian to Employment in Midlothian only

6.1.3 The analysis above highlights that:

- northern and central localities in Midlothian offer the best public transport connectivity to job destinations. Areas such as Dalkeith, Bonnyrigg, Loanhead, Penicuik, Danderhall, and Roslin have the highest average Hansen scores in the region.
- the more rural southern areas of Midlothian experience the poorest access to job destinations. Localities like Pathhead and Gorebridge have low Hansen scores, while even the rural area near Danderhall in the north, despite its proximity to Edinburgh, has a low Hansen score.
- A number of areas have better connectivity to employment in general than connectivity to employment in Midlothian. For example, Pathhead has poor connectivity to employment in general but when only employment in Midlothian is considered, it performs even less well. This highlights the poor east-west public transport connectivity in Midlothian.

6.1.4 While it is difficult to determine the overall impact the development in Midlothian will have on the above connectivity to employment patterns, it is worth noting that many of the sites within the housing land audit fall within areas where connectivity to employment is poor. In order to ensure this development does not result in high rates of car travel, it will be important to improve public transport connectivity to employment from these locations.

#### **Connectivity Deprivation Audit Tool: understanding socio-economics and connectivity**

6.1.5 To better understand access to services across Midlothian, analysis was undertaken using a bespoke Connectivity Deprivation Audit Tool (CDAT). This classifies areas into

three 'tiers' based on the correlation between i) the level of deprivation (drawing upon the Scottish Index of Multiple Deprivation 2020) in that area and ii) their level of public transport connectivity.

6.1.6 The analysis was undertaken at the Scottish Datazone (2011) level, with datazones then placed into one of three tiers depending on the level of correlation. These three tiers consist of:

- **Tier 1:** Datazones in this tier either display scores above the regional weighted average or show no correlation between the respective scores of the socio-economic indicators and travel times. For example, high levels of educational attainment but low levels of connectivity to educational institutions, or low levels of educational attainment but good connectivity to educational institutions.
- **Tier 2:** Datazones in this tier display scores on trend to the region weighted average in terms of performance against the socio-economic indicators and travel times slightly above the regional median travel times.
- **Tier 3:** Datazones in this tier are those that have high levels of deprivation combined with poor levels of connectivity to the associated opportunities / services. Specifically, they register scores of social deprivation below the regional (i.e. Midlothian) median and connectivity scores equal to or less than the regional median travel times. These areas may also see high levels of 'forced car ownership'<sup>21</sup> as alternative transport options are limited.

6.1.7 Using this tiered approach identifies those areas which are in most need of further focus and potential intervention to help reduce the level of deprivation (i.e., Tier 3 datazones), and thus help improve access to services for the region's population. This facilitates a targeted approach towards

<sup>21</sup> Where a person / household has to maintain a car despite the financial strain of doing so because of a lack of alternative transport options

identifying problems and development of objectives for the LTS.

- 6.1.8 Although this analysis has been undertaken looking at each destination type in terms of use, it is important to note, that many of these destinations are multi-purpose. For example, hospitals are a place for employment, health appointments and visiting. Therefore, this should be considered when studying the analysis in the following sections.
- 6.1.9 The following sections provide commentary on Midlothian's access to employment and education destinations.

### Public transport access to employment

- 6.1.10 Enabling access to employment locations is vital to the growth and stability of any local economy. As such, analysis of connectivity to strategic employment, local employment and retail destinations was undertaken to ascertain which localities – in terms of employment – are 'connectivity deprived' within Midlothian in terms of access by public transport.
- 6.1.11 Figure 6-4 shows connectivity to employment destinations within Midlothian and adjoining local authority areas (City of Edinburgh, Falkirk, Scottish Borders, East Lothian, and West Lothian). These employment destinations have a relatively high concentration of jobs (in the context of the regional economy). NOMIS Business Register and Employment Survey (BRES) employment figures have been used as weighting factors to represent the 'value' of each destination.

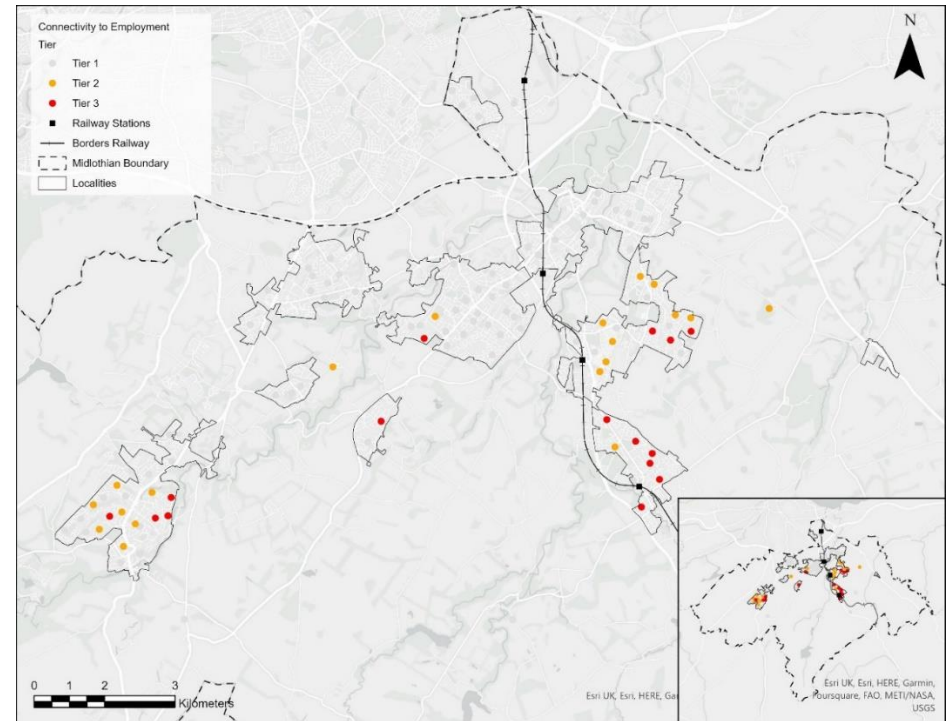


Figure 6-4: Connectivity to employment destinations

- 6.1.12 The figure shows how there is concentrations of Tier 3 locations within localities of Midlothian, with Penicuik, Mayfield and Gorebridge all seeing multiple Tier 3 locations. Additionally, Bonnyrigg and Rosewell each have one Tier 3 location. Overall, these Tier 3 locations constitute 12% (11,198) of the Midlothian region's population.
- 6.1.13 There is also a similar picture for the Tier 2 results, with there being numerous datazones in Penicuik and Mayfield. Additional datazones are also located throughout rural regions of the local authority area. Approximately 15%



(14,099) of the Midlothian region's population live in Tier 2 locations.

- 6.1.14 As noted above with respect to the Hansen scores, it is noted that many of the sites within the housing land audit fall within areas where there are concentrations of both Tier 2 and Tier 3 locations. In order to ensure this development does not result in high rates of car travel in these locations, it will be important to improve public transport connectivity to employment from these locations.

### Public transport access to education

- 6.1.15 Facilitating better connectivity to education destinations is a highly effective way of reducing existing social inequalities and creating a fairer, more prosperous region. Consequently, this section analyses connectivity to further education facilities based in Midlothian and the surrounding local authorities.
- 6.1.16 Figure 6-5 shows **Error! Reference source not found.** connectivity to university destinations within and beyond Midlothian. As above, a travel time window of two hours was used as a selection criterion for the latter destinations. Only further education facilities affiliated with Universities Scotland were considered within the analysis.
- 6.1.17 This figure shows that there is a concentration of Tier 3 locations within several of the localities in Midlothian, with Penicuik, Loanhead, Danderhall and Dalkeith all seeing multiple Tier 3 locations. Additionally, Bonnyrigg has one Tier 3 location. Overall, these Tier 3 locations constitute 9% (8,714) of the Midlothian region's population.
- 6.1.18 There is also a similar picture for the Tier 2 results, with there being numerous datazones in Penicuik, Loanhead, Bonnyrigg and Dalkeith. Additional datazones are also located throughout rural regions of the local authority area. Approximately 14% (12,875) of Midlothian region's population live in Tier 2 locations.

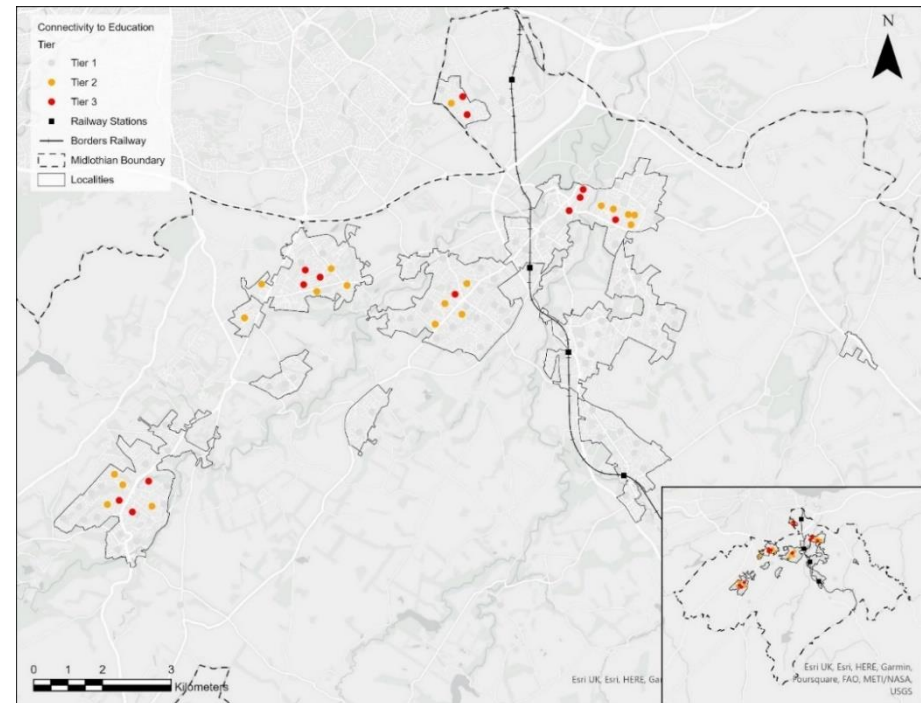


Figure 6-5: Connectivity to Education

## 6.2 Bus

### Bus service overview

6.2.1 There are four bus operators active within Midlothian, namely:

- **Lothian Buses** – which predominantly provides connections between Midlothian and Edinburgh City Centre / Edinburgh suburbs.
- **Borders Buses** – which predominantly provides connections between Scottish Borders and Midlothian and onward travel to Edinburgh City Centre
- **East Coast Buses** – which provides one connection between Midlothian and Musselburgh (East Lothian) and one internal service serving Bonnyrigg and Dalkeith. East Coast Buses is part of the Lothian Buses Group.
- **Houston's Coaches** – which provides one service between Dumfries and Galloway / South Lanarkshire and Midlothian
- **Prentice of Haddington Coaches** - which provide one service between Haddington (East Lothian) and Royal Infirmary (Edinburgh), serving Millerhill and Danderhall settlements within Midlothian area.

6.2.2 A description of each bus service, including the service number, route, Midlothian settlements served, weekday frequency, and first and last departure to / from Edinburgh City Centre (where relevant) are set out in Appendix C Maps showing Lothian Bus services (which includes East Coast Buses services) and Borders Buses are provided in Figure 6-6 and Figure 6-7 respectively. It is noted that Borders Bus Services x70 and 339 ceased operation in 2020 and 2022 respectively.

6.2.3 Nearly all services are operated on a commercial basis therefore Midlothian Council has very limited control over bus services in the area. This also means there is no publicly

available data regarding bus passenger numbers in Midlothian.

6.2.4 The majority of services which serve Midlothian route beyond the local authority boundary, with most connecting to Edinburgh City Centre. There are relatively few east-west connections across the local authority area. This can act to reduce connectivity to key Midlothian employment centres such as Straiton and the MSZ for Midlothian residents. There is also a lack of bus connections to some key visitor locations, including Vogrie Country Park.

6.2.5 As with active travel connections, the **A720 City Bypass again creates significant severance across the north of Midlothian** which impacts bus connectivity. There are only five crossing points by road and routine congestion and incidents on the bypass can cause north-south traffic accessing the bypass to queue back and block north-south travel. This contributes to long bus journey times when travelling to the capital during peak times.

6.2.6 There are no bus services which specifically connect to the rail stations:

- Service 29 (Silverknowes to Gorebridge) and Service 139 (Dalkeith Campus to Midlothian Community Hospital) route near to Eskbank Station, stopping at the Tesco / Costa Coffee in Eskbank which is a two-minute walk from the station. However, during the engagement undertaken to inform this study, it was noted that this walking link is too narrow to accommodate wheelchairs and there is poor visibility.
- The X95 stops at Fourth Street, a four-minute walk from Newtongrange Station and Service 29 (Silverknowes to Gorebridge) and Service 48 (Gorebridge to Musselburgh) route past Gorebridge Station but do not connect directly to it.

6.2.7 In May 2023, Lothian Buses withdrew Service 49 which provided a direct connection from Rosewell to Edinburgh, with

residents of Rosewell now having to travel via Service 46 to the Royal Infirmary and interchange there for onward connections to Edinburgh.



Figure 6-6: Lothian Bus network map showing Lothian Buses and East Coast Buses which serve Midlothian (Source: Lothian Buses)



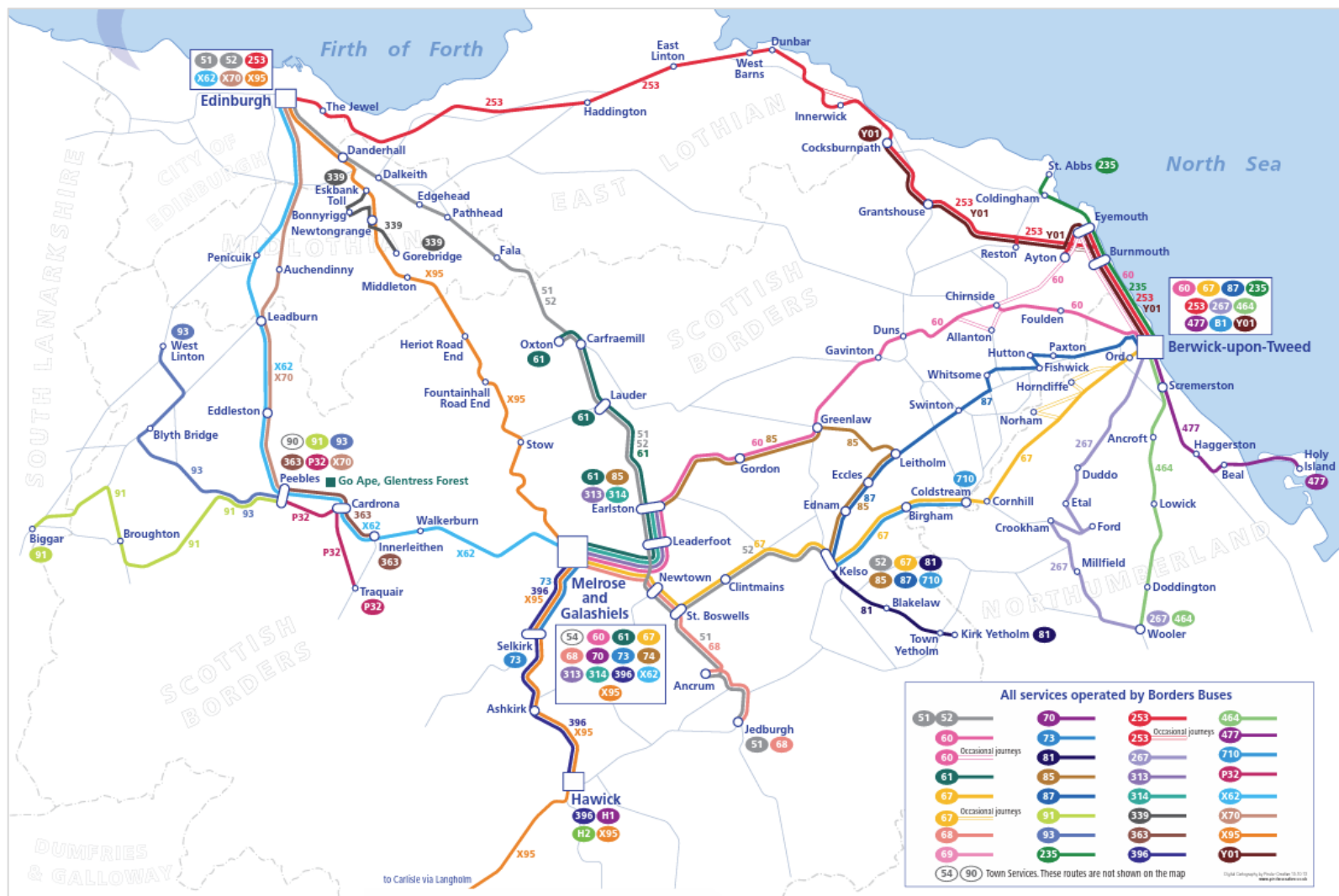


Figure 6-7: Borders Bus network map showing Border Buses bus services which serve Midlothian (Source: Borders Buses)



6.2.8 Services X62 (Galashiels to Edinburgh City Centre via Penicuik) and Service X95 (Carlisle to Edinburgh City Centre via the A7) which are operated by Borders Buses are 'bike buses' on which users can travel with their bike. The vehicles have between 2 and 4 bike spaces which operate on a first-come-first-serve basis. In July 2023, Borders Buses increased the frequency on the X95 service from two-hourly to hourly between Galashiels and Edinburgh, Monday to Saturday and extended the operating time with later journeys from Midlothian to Edinburgh and from Edinburgh to Midlothian.

6.2.9 In February 2022, the Scottish Government allocated funding to support Midlothian Bus Partnership in bringing forward improvements to bus services in Midlothian. As part of this work, proposals are currently being developed for the following corridors:

- A6094 Whitecraig to A6094 Eskbank
- B6392 Eskbank to A772 Gilmerton Junction
- A7 Gorebridge to A7 Danderhall
- A6094 Eskbank to A701 Straiton.

### Community transport and taxi services

6.2.10 In addition to the above operators, **Lothian Community Transport Services (LCTS)** run a number of scheduled community bus routes (Services R1, R2, R3, R4, and R5) in areas that are less well served by the commercial bus network. These routes are available to all members of the public, including those with National Entitlement Cards (NEC) or Young Scot cards and are included in the bus connectivity analysis below. The services generally run just once a week

in each direction on either a Monday or a Thursday and are operated using minibuses with a max capacity of 15 passengers. Wheelchair users can use the service but have to book in advance<sup>22</sup>.

6.2.11 In addition, Midlothian Council support a **Ring & Go taxi service** for communities affected by the withdrawal of regular bus services. The Ring & Go service operates in five areas (as detailed in the table below) and is operated by Swift Taxis. The service operates on a timetable but only runs when pre-booked by scheme members. There are eight services a day running southbound from Dalkeith between 0710 and 2235 and nine services a day running northbound from Pathhead between 0625 and 2315. A membership card is required to access the service and users pay a fixed rate per single journey (£1.70 or £2.80 depending on route), with the council topping up the payment to an agreed contract price.

Table 6-1: Ring & Go Taxi Service schemes

Area covered	Provides links to
Auchendinny	Gowkley Moss, Milton Bridge or Penicuik
Cousland	Dalkeith
	Pathhead
Pathhead	Dalkeith via Edgehead, Whitehill
Howgate	Penicuik via Loanstone, Maybank
Hilltown	Hilltown, Moorfield, Cauldcoats to Danderhall

6.2.12 HCL Dial-A-Ride service also provide door-through-door transport service for people with mobility challenges who are resident in either Edinburgh or the Lothians. This includes older people; people with disabilities, additional support

<sup>22</sup> Wheelchair users can also be picked up from their home where it is safe to park outside

needs, illness or health condition (long term or short term) affecting mobility; or those rurally isolated.

- 6.2.13 Users register in advance and once registered can call the local booking office to book their trip. The service operates 7 days a week, including evenings and will transport users wherever they wish to go, including across Scotland and to different parts of England. Dial-A-Ride is charged on a mileage basis at £6.00 for the first mile and then 75p per mile thereafter. The mileage is calculated 'as the crow flies', i.e., the most direct route.

### Council support for bus services

- 6.2.14 Midlothian Council is a minority shareholder in Lothian Buses.
- 6.2.15 Currently, the council does not directly support any individual bus services, but it does make a contribution to East Lothian Council (ELC) and Scottish Borders Council (SBC) to help cover the cost of services which run through these areas and also serve Midlothian. In addition, the council provides funding for the Ring & Go service.
- 6.2.16 Figure 6-8 Shows Midlothian Council's expenditure on bus services between 2014/15 and 2022/23. Overall, total expenditure has declined by 40% over this period. This likely reflects the increasing downward pressure on budgets as well as reduced patronage figures since COVID-19.

### Bus fares

- 6.2.17 Bus fares vary across the operators in Midlothian, with single adult tickets on Lothian Buses and East Coast Buses costing £2-£3, a single on Borders Buses costing £5.80, and a single on the Houston's Coaches services from Penicuik to Edinburgh costing £1.80. A range of day and season tickets are also available, including the Lothian Bus 'TapTapCap' system whereby passengers use a contactless card or device, and payments are automatically capped at the best adult daily or weekly fare. TapTapCap is available across the Lothian Bus network, including East Coast Buses.

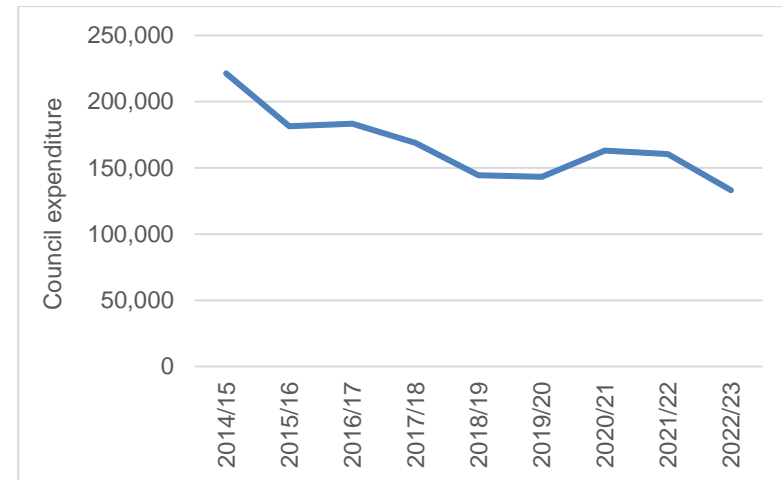


Figure 6-8: Midlothian Council supported bus expenditure 2014/15 to 2022/23

- 6.2.18 Where users wish to regularly travel across two operators, 'OneTicket' can be used. This is an app-based travel scheme which allows travel across multiple operators; currently Borders Buses, East Coast Buses, and Lothian Buses are part of the scheme. Tickets can be purchased for daily, multi-day bundles, weekly, or monthly use, ranging from £6.00 to £74.00, with an annual pass costing £841.00. These prices

are for an adult within the 'Edinburgh Smart Zone' which includes Midlothian and Edinburgh city centre.

- 6.2.19 During the engagement undertaken to inform the development of this Draft Stage 1&2 Report, reference was made to the high cost per mile when travelling by bus from some areas of Midlothian compared to elsewhere. For example, residents of Pathhead and residents of the Scottish Borders have to pay the same amount for either a single (£5.80) or a day (£10.15) ticket for travel across the Borders Bus network, an area which includes Carlisle, Scottish

Borders, Berwick, Lothian and Edinburgh. This means, for example, that someone travelling from Jedburgh to Edinburgh only pays £0.21 per mile whereas someone travelling from Pathhead to Edinburgh pays £0.83 per mile.

- 6.2.20 During the engagement undertaken to inform the development of this Draft Stage 1&2 Report, reference was made to the high cost per mile when travelling by bus from some areas of Midlothian compared to elsewhere. For example, residents of Pathhead and residents of the Scottish Borders have to pay the same amount for either a single (£5.80) or a day (£10.15) ticket for travel across the Borders Bus network, an area which includes Carlisle, Scottish Borders, Berwick, Lothian and Edinburgh. This means, for example, that someone travelling from Jedburgh to Edinburgh only pays £0.21 per mile whereas someone travelling from Pathhead to Edinburgh pays £0.83 per mile.

### Bus service – connectivity analysis

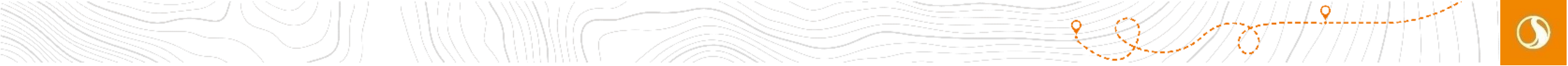
- 6.2.21 To provide an overview of the bus network, including both connectivity to the network itself, as well as the connectivity provided by the services, detailed spatial analysis has been

undertaken. The analysis has considered the extent to which there is convenient access to bus stops in Midlothian, the frequency of services, the availability of direct connections to Edinburgh, and the level of provision during the evening and on Sundays. The analysis has been undertaken at full-postcode level. This provides enhanced granularity, with each postcode representing a handful of households. Summing the associated number of households contained within each postcode which meet different criteria has enabled a detailed understanding of connectivity to the bus network and services, both across the local authority and for each of Midlothian's key towns.

#### Convenient access to a bus stop

- 6.2.21 In order to assess the level of access to bus stops across Midlothian and identify areas where bus stop provision is limited, an analysis of the walk distances to the nearest bus stop was undertaken at the postcode level. Walk distances were established using postcode centroids and a representation of the street and path networks in Midlothian. Drawing on the Scottish Government's Urban Rural six-fold classification<sup>23</sup>, postcodes were then defined as having 'convenient access to a bus stop' where they met the following criteria:
- Postcodes located within 400m of a bus stop (in line with national guidance on the maximum desirable walking distance to a stop) and in a 'large urban area' or a 'other urban area'
  - Postcodes located within 600m of a bus stop and in an 'accessible small towns' or a 'rural small town'
  - Postcodes located within 800m of a bus stop and in an 'accessible rural area' or a 'remote rural area'

<sup>23</sup> See [2. Overview - Scottish Government Urban Rural Classification 2020 - gov.scot](https://www.gov.scot/publications/urban-rural-classification-2020/pages/2-overview.aspx) ([www.gov.scot](https://www.gov.scot))



6.2.22 The location of the postcodes with and without convenient access to a bus stop according to the above definition is shown in Figure 6-9 and the proportion of households at the Midlothian level and within each locality in Midlothian without access is shown in Table 6.2.

6.2.23 The analysis indicates that, in total, **17% of households in Midlothian (approximately 7,500 households) do not have convenient access to a bus stop**, with some clear pockets experiencing particularly low rates of access (e.g., Newbattle, Penicuik, and Bonnyrigg).

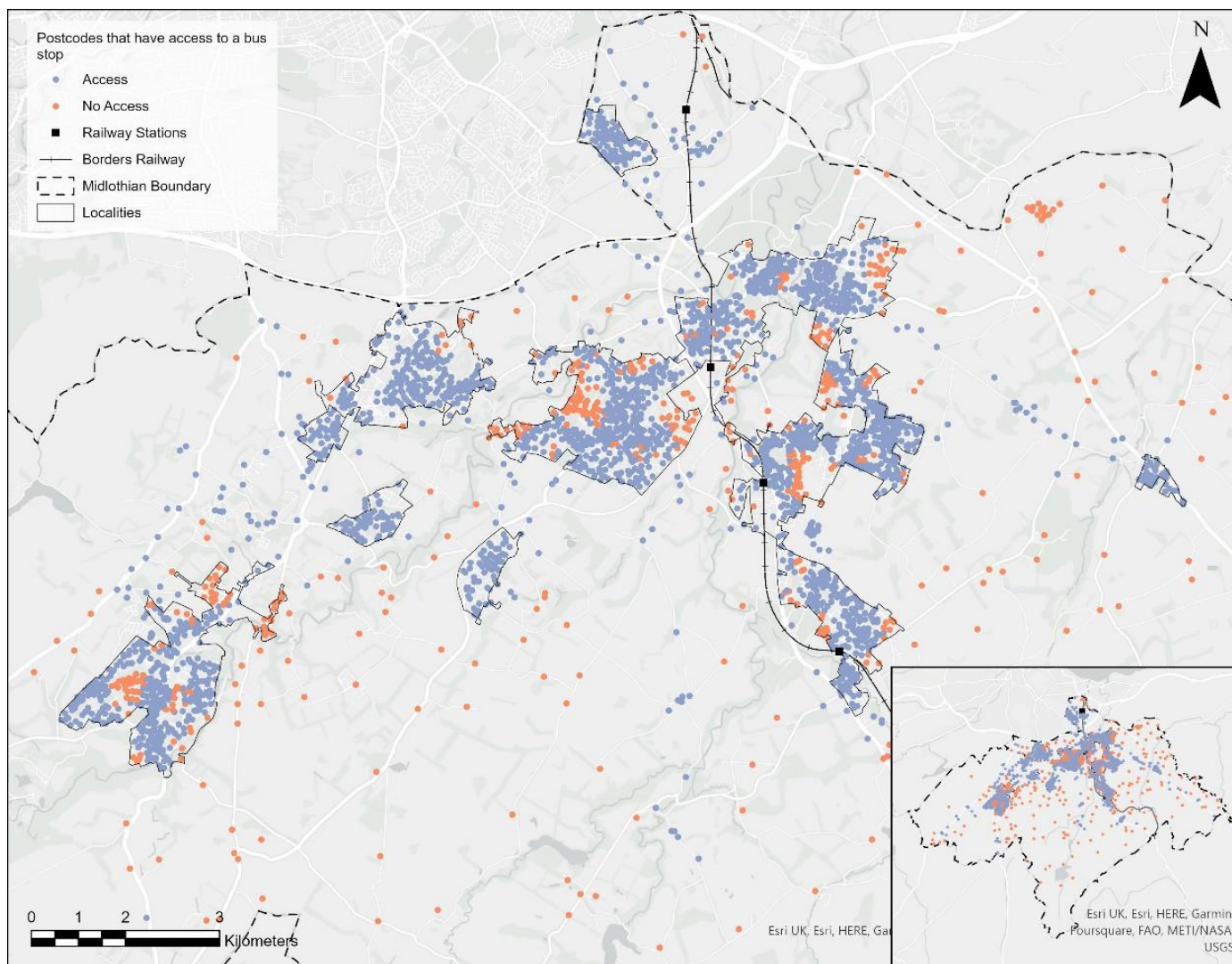


Figure 6-9: Postcodes with or without convenient access to a bus stop



Table 6-2: Number of households in Midlothian with convenient access (as defined above) to a bus stop

Location	Number of households without convenient access to a bus stop	% households without convenient access to a bus stop
Bilston	0	0%
Bonnyrigg	1,591	21%
Dalkeith	1,223	18%
Danderhall	0	0%
Gorebridge	581	15%
Loanhead	21	1%
Mayfield	1,034	17%
Newbattle	120	53%
Pathhead	0	0%
Penicuik	1,776	24%
Rosewell	0	0%
Roslin	0	0%
Other	1,199	35%
Midlothian	7,545	17%

**Key point:** Nearly 20% of households in Midlothian do not currently benefit from convenient access to a bus stop (as defined above). Residents in these areas have a longer walk than what would be reasonably expected given where they live and this is likely to deter some people in these locations from using the bus, with long walks being a particular barrier for certain equality groups, including those with mobility issues / young children and those with concerns around personal safety when using public transport / walking, particularly at night.

### Weekday service frequency

6.2.24 Bus service frequency has an important bearing on whether an individual deems the bus to be a viable option for their trip. To visualise bus frequency across the local authority area, two maps were produced as follows:

- Figure 6-10 shows the cumulative number of buses (all services) on each road corridor between 0500 and 2359 on a typical weekday with thicker lines indicating higher frequencies.

- Figure 6-11 shows the cumulative number of buses (all services) serving each bus stop within Midlothian between 0500 and 2359 on a typical weekday with red indicating relatively low frequency and green indicating relatively high frequency bus stops.

6.2.25 Both maps are based upon the published bus network as of the second week of October 2023.

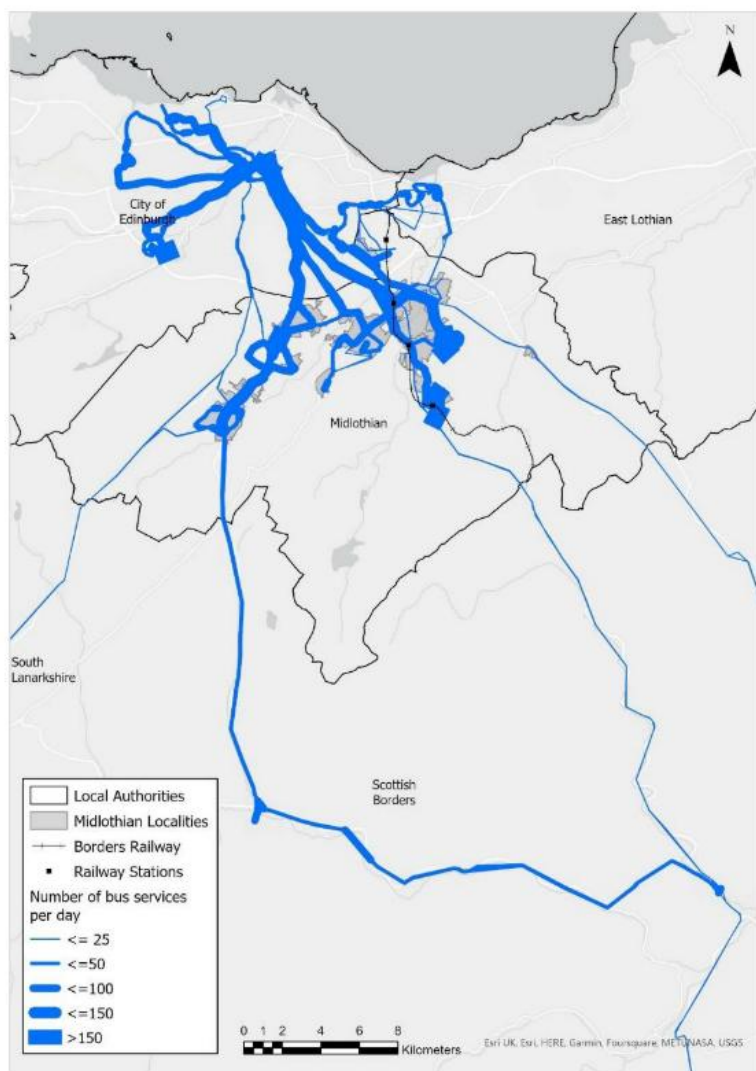


Figure 6-10: Frequency of bus services by road corridor – Weekday 0500-2359

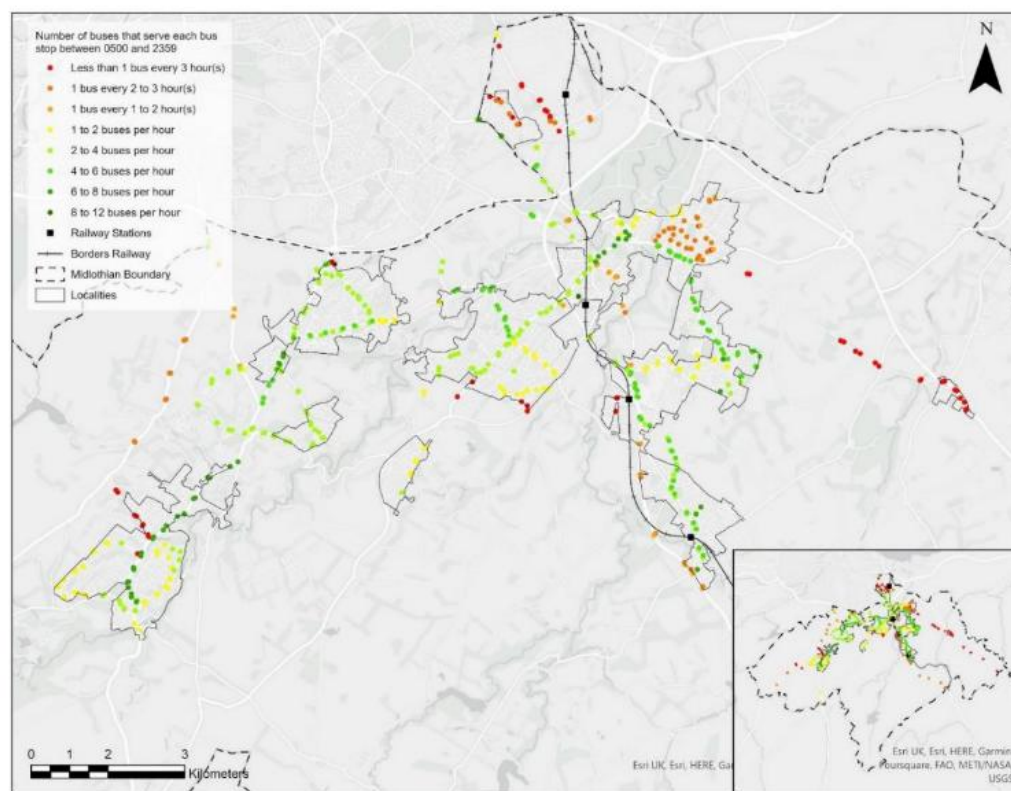


Figure 6-11: Frequency of bus services by stop - Weekday 0500-2359



6.2.26 As would be expected, service frequency is higher on the main road corridors through the key settlements, with lower frequency on less major routes and in more rural locations. The key road corridors for bus services into Edinburgh are the A701, Lasswade Road, the A772, and the A7, with frequency on the northern sections of these routes particularly high.

6.2.27 Figure 6-11 shows that there are several bus stops where bus frequency is less than one bus every three hours. These stops are those served by the LCTS community bus routes (services R1, R2, R3, R4, and R5) which operate once a week on either a Monday or a Thursday.

6.2.28 The most frequently served stops are located on the A701 through Penicuik and Bilston, and on the A6094 through Bonnyrigg and Dalkeith as well as the A6106 and the B6482 between Dalkeith and Mayfield and the A7 south of Danderhall. However, there are also stops within these settlements which are less well served. The co-occurrence of high frequency stops and lower frequency stops within settlements may mean that residents must choose to either use their closer – but more sporadic – services, or travel further to access more frequent bus services. This can have a particular impact on those with limited mobility and / or childcare responsibilities for whom a longer walk may be challenging.

6.2.29 The level of household access to bus stops served by frequent bus services at both the Midlothian level and for each locality in Midlothian is shown in Figure 6-12 and Figure 6-13 respectively. This analysis is based upon the most frequently served bus stop within a convenient walk (as defined above) of each household.

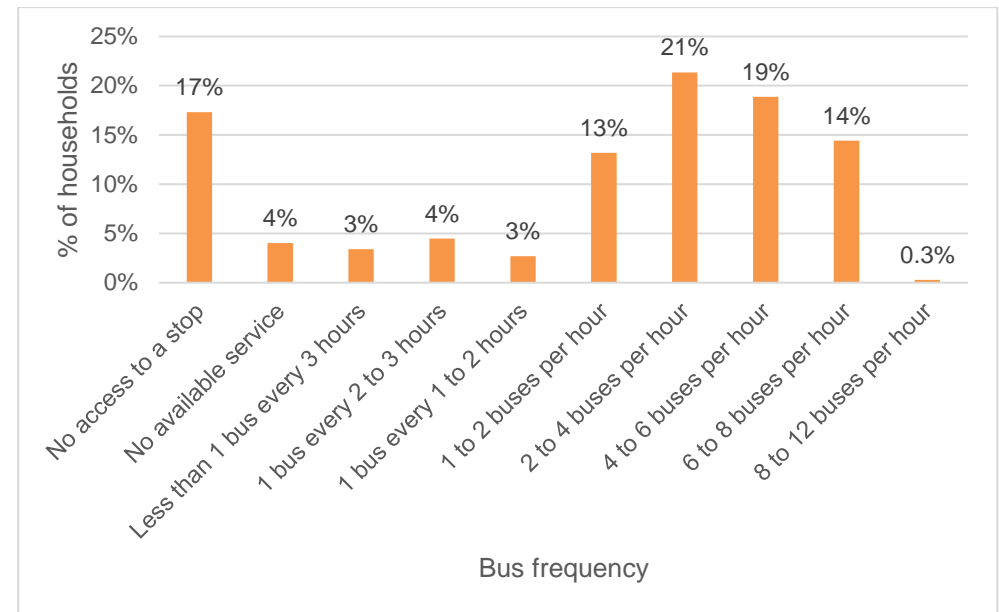


Figure 6-12: Percentage of households in Midlothian as a whole with defined bus frequencies

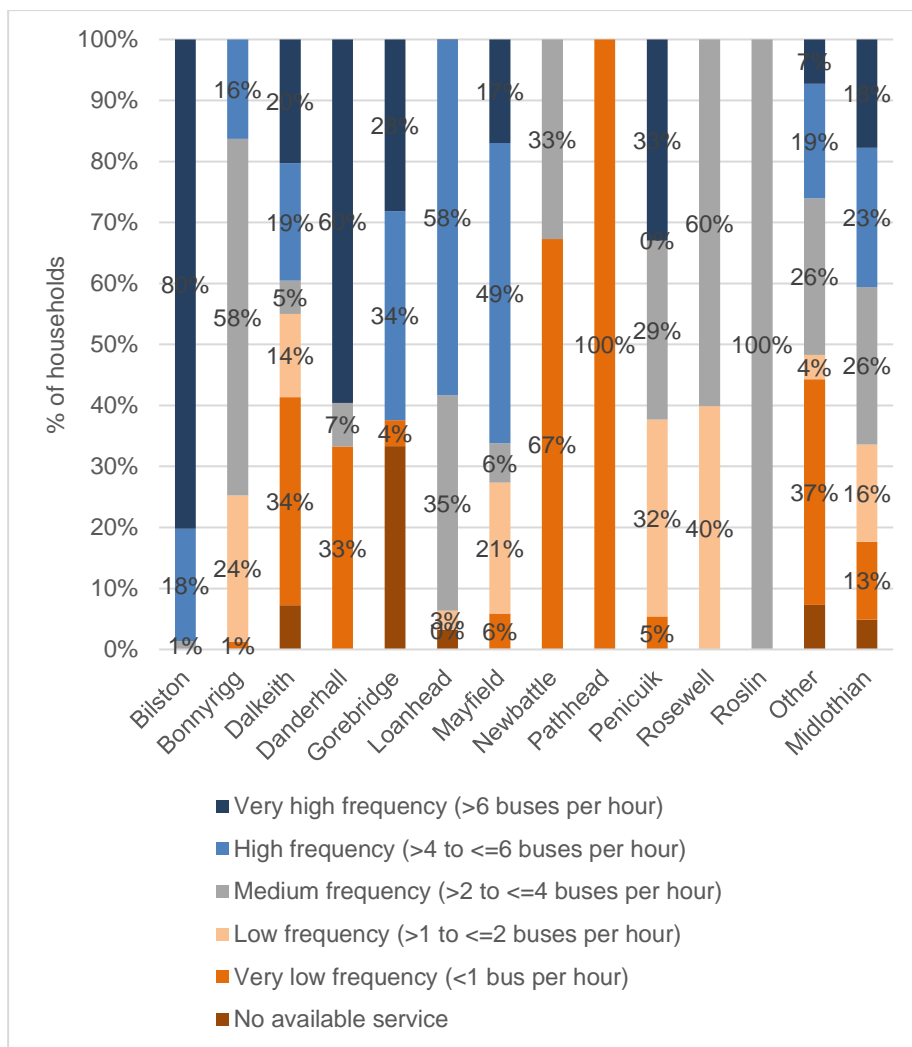


Figure 6-13: Percentage of households in with defined bus frequencies by locality

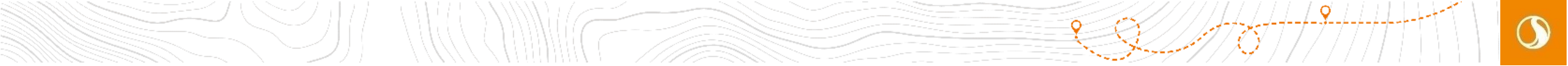
6.2.30 Over half of households in Midlothian benefit from convenient access to bus stops with services frequencies of two or more


buses services per hour. However, **around 10% of households can only conveniently access bus stops with service frequencies of less than one bus every two hours.** Amongst Midlothian's localities, Pathhead which is located some distance from the higher frequent road corridors, has the lowest service frequency, with only one bus every 2-3 hours serving each stop.

**Key point:** Around 10% of households in Midlothian only have convenient access to bus stops with poor service frequency (less than one bus every hour). While some of these households are in more rural locations, the analysis indicates that there are also households in Midlothian's settlements falling into this category. While some households may opt to walk further to access more frequent services, as discussed above, long walks to bus stops can be particularly challenging for some equality groups, resulting in inequalities in access.

#### Weekday direct connections to Edinburgh

- 6.2.31 As discussed in Chapter 3, a large proportion of Midlothian's residents travel into Edinburgh for work. The capital is also the major hub for education, healthcare, retail and social and leisure services and opportunities.
- 6.2.32 When making public transport trips, the requirement to interchange can be a significant barrier to use. This is because the need to interchange adds to overall journey times, can add to costs, and introduces uncertainty in making connections. The need to interchange can also be a particular barrier for more vulnerable users, including those with mobility issues / young children, young people wishing to travel independently, and other groups who may experience greater personal security fears when using public transport.
- 6.2.33 An analysis of the extent to which households in Midlothian can access direct bus connections to Edinburgh City Centre (taking Waverley Station as the destination point) across the day and evening was therefore undertaken. This considered



only those households who have convenient access to a bus stop as defined above. The results of the analysis by time of day are shown in Overall, the analysis suggests that 14% of households with convenient access to a bus stop do not have a direct connection into Edinburgh City Centre during the AM peak (0700-1000), with this figure increasing to above 30% during the evening period.

- 6.2.34 The level of direct bus connectivity to Edinburgh varies by locality with Rosewell and Pathhead being particularly poorly connected. As noted above, Rosewell previously benefitted from a direct connection to Edinburgh City Centre (Service 49) but this was withdrawn by Lothian Buses in May 2023. Interestingly, a relatively high proportion of households in Dalkeith, Danderhall, and Gorebridge have no access to direct connections, with direct connectivity from Dalkeith more limited in the evenings.

**Key point:** Around 14% of households in Midlothian are unable to conveniently access a direct connection to Edinburgh City Centre, with the proportion of households falling into this category varying across the local authority area. Furthermore, the figure increases to 30% during the evening. Given that the requirement to interchange is a significant barrier to public transport use, the lack of a direct service could be contributing to higher levels of car use as well as 'forced car ownership' in these areas, with the lack of a direct evening service likely to be particularly challenging for those working evening shifts.

- 6.2.35 Table 6-3. It is noted that this analysis considers to and from Edinburgh City Centre. Overall, the analysis suggests that 14% of households with convenient access to a bus stop do not have a direct connection into Edinburgh City Centre during the AM peak (0700-1000), with this figure increasing to above 30% during the evening period.
- 6.2.36 The level of direct bus connectivity to Edinburgh varies by locality with Rosewell and Pathhead being particularly poorly connected. As noted above, Rosewell previously benefitted from a direct connection to Edinburgh City Centre (Service 49) but this was withdrawn by Lothian Buses in May 2023. Interestingly, a relatively high proportion of households in Dalkeith, Danderhall, and Gorebridge have no access to direct connections, with direct connectivity from Dalkeith more limited in the evenings.

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Table 6-3: Proportion of households in Midlothian with convenient access to a bus stop but without access to a direct bus connection to Edinburgh City Centre

	7:00-10:00	10:00-16:00	16:00-19:00	19:00-20:00	20:00-21:00	21:00-22:00	22:00-23:00	23:00-24:00
Bilston	0%	0%	0%	0%	0%	1%	1%	1%
Bonnyrigg	17%	17%	17%	17%	17%	17%	45%	45%
Dalkeith	33%	55%	36%	55%	57%	60%	60%	60%
Danderhall	33%	33%	33%	33%	33%	33%	33%	33%
Gorebridge	33%	33%	33%	33%	33%	33%	38%	38%
Loanhead	6%	6%	6%	6%	6%	6%	6%	6%
Mayfield	1%	26%	2%	21%	26%	26%	27%	27%
Newbattle	0%	0%	0%	0%	8%	67%	67%	67%
Pathhead	0%	0%	0%	0%	100%	100%	100%	100%
Penicuik	0%	0%	0%	0%	5%	2%	7%	9%
Rosewell	2%	100%	0%	100%	100%	100%	100%	100%
Roslin	0%	0%	0%	0%	0%	0%	0%	0%
Other	16%	17%	16%	21%	35%	37%	57%	57%
<b>Midlothian</b>	14%	15%	28%	35%	22%	31%	15%	28%

## Operating hours

- 6.2.37 The operating hours of a service are the length of time over which the service runs from the first service until the final service of the day. Where operating hours are short, this can limit opportunities for people to undertake certain activities, including going to and returning home from employment, shift work, and / or going out to leisure and social events in the evening. To help visualise and identify issues with operating hours, Figure 6-14 and Figure 6-15 show the time of the first and last bus at each bus stop in Midlothian between 0500 and 2359 on a typical weekday. As above, this analysis is based upon the published bus network in the October 2023.
- 6.2.38 Overall, the majority of bus stops are served by early morning services (prior to 07:00 and after 23:00). As with the bus frequency maps:
- there are several areas where the map suggests that services don't start until after 09:00 and / or finish before 15:00 – these relate to the LCTS community bus routes as discussed above
  - bus stops with the earliest and latest services tend to be located on the main A and B roads running through Midlothian's settlements
  - outside of these main corridors, there are some stops in settlements which have relatively short operating hours. These include several in Dalkeith for which the last service is prior to 19:00. As above, the co-occurrence of stops with longer and shorter operating hours within settlements could mean people have to walk further to access services, elongating travel times and having a particular impact on those with limited mobility and / or childcare responsibilities.
  - operating hours are generally shorter in the less populated more rural areas, with bus services on the A68 and the southern section of the A7 finishing relatively early (prior to 19:00)

**Key point:** The majority of bus stops in Midlothian are served by both early morning and late-night services. However, there are several locations, including certain stops within Midlothian's key towns, where the operating day is relatively short. This could impact the ability of residents in these areas to access employment, key services and social and leisure opportunities and could contribute to forced car ownership and higher car use.



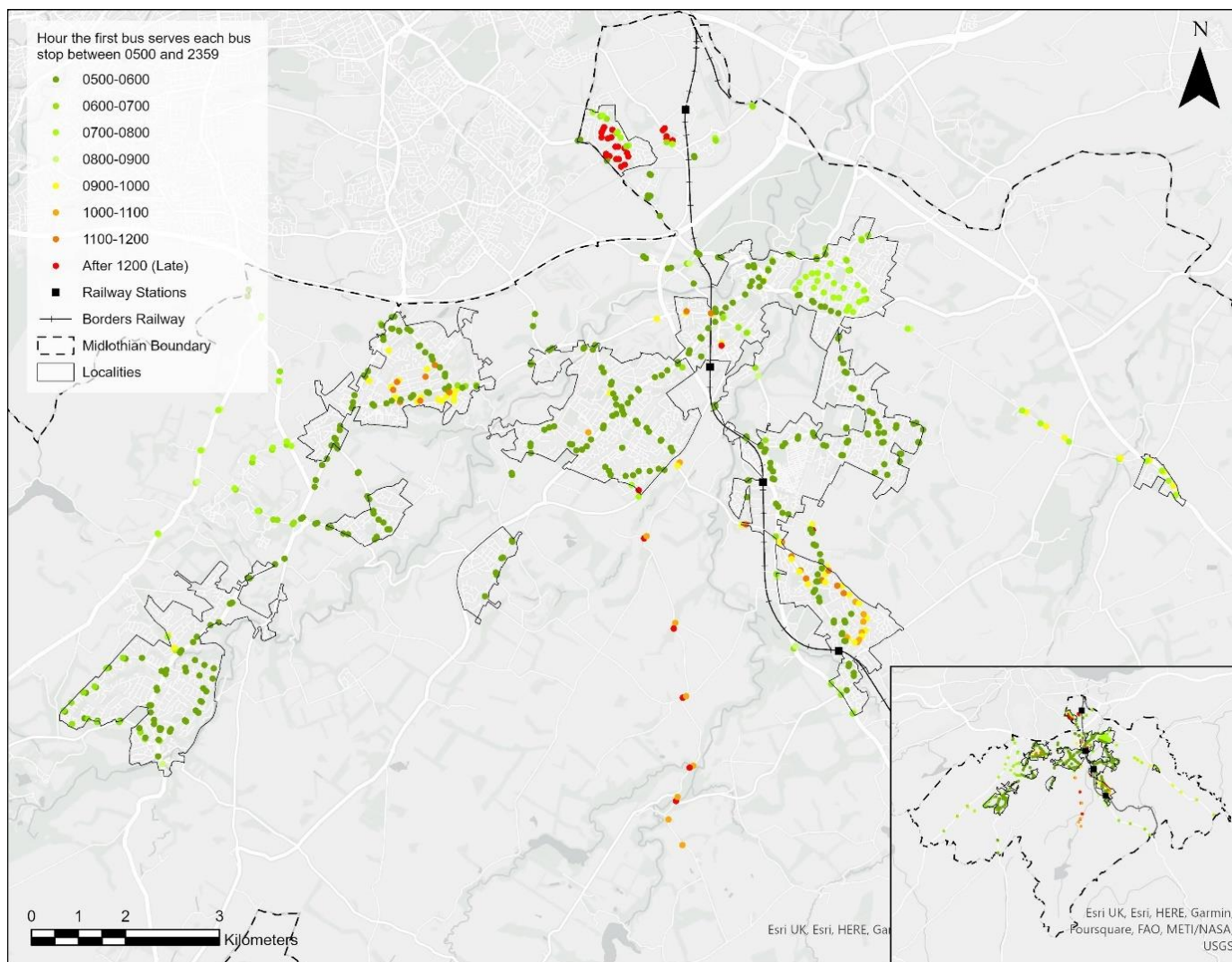


Figure 6-14: First Bus Service for each Bus Stop within Midlothian



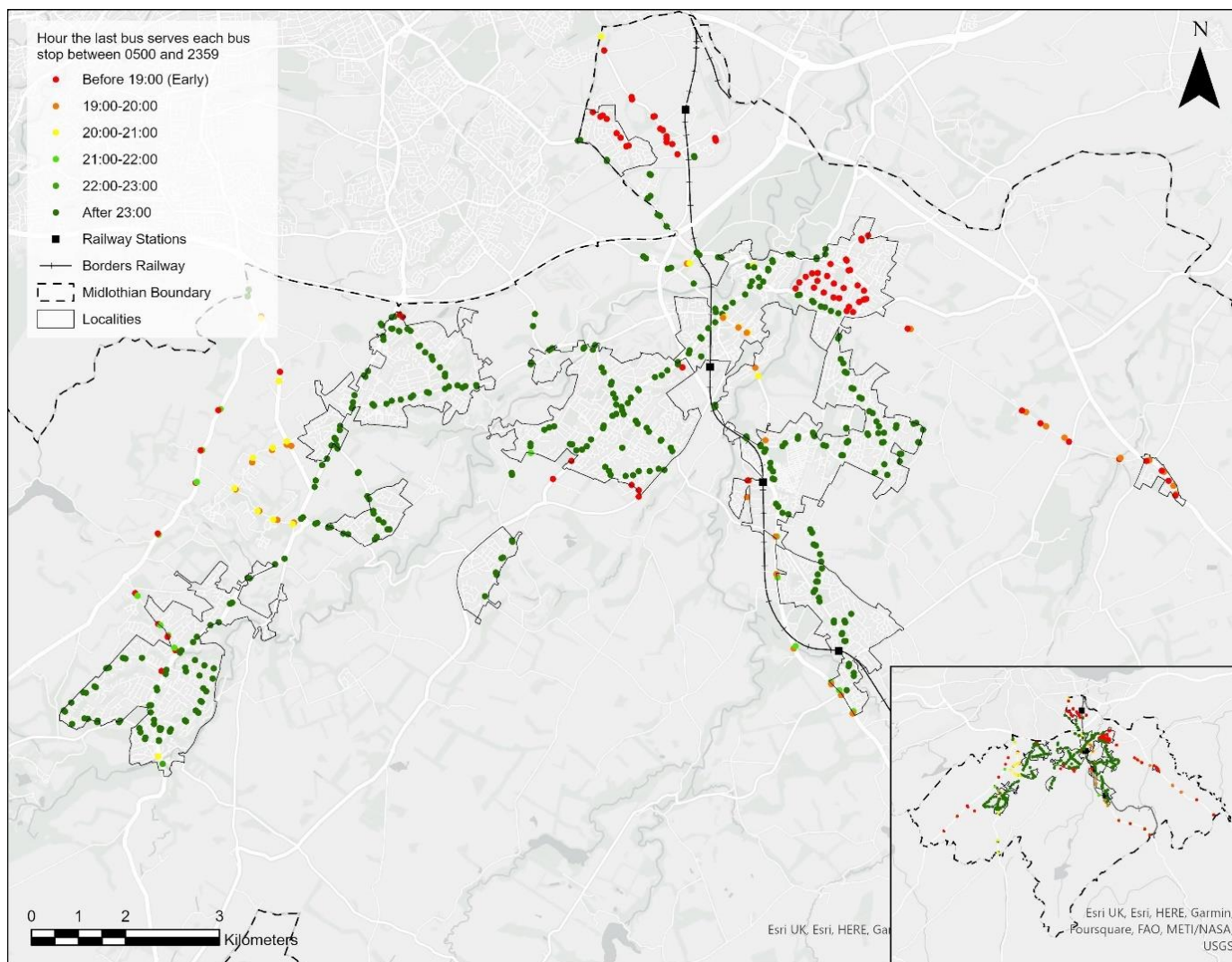


Figure 6-15: Last Bus Service for each Bus Stop within Midlothian



## 6.3 Findings from previous public engagement activities

6.3.1 Figure 6-16 shows satisfaction with the bus services amongst Midlothian respondents to the 2021 public survey undertaken to inform the SEStran RTS. Responses are shown for only those who indicated that they typically travel by bus at least monthly.

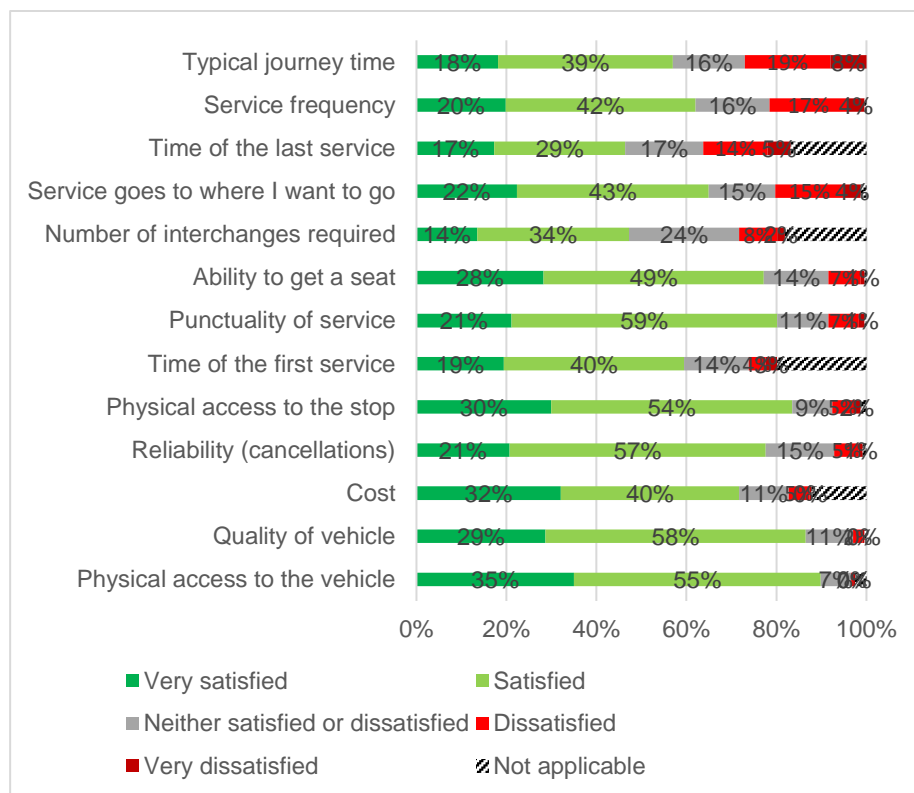


Figure 6-16: Satisfaction with the bus prior to the Pandemic (n=237) (Source: SEStran Regional Transport Strategy Public Survey 2021)

6.3.2 The highest levels of dissatisfaction were with bus journey times and service frequency with 27% and 21% respectively indicating that they were dissatisfied with these aspects. There were also high levels of dissatisfaction with the time of the last service, the destinations served, and the number of interchanges required.

6.3.3 Where respondents indicated they were dissatisfied with certain aspects, they were also invited to provide further comments if they wished. The key points raised with respect to bus travel were as follows:

- long journey times (20 comments)
- lack of early and late services (15 comments)
- lack of direct services / need for interchange (13 comments)
- unreliable services (4 comments)
- overcrowded services (4 comments)
- no service available (4 comments)
- low frequency (3 comments)
- roads not fit for buses (1 comment)
- anti-social behaviour of passengers on buses (1 comments)
- lack of covered bus shelters (1 comment)
- bus service being too expensive (1 comment).

6.3.4 During the stakeholder and public engagement activities undertaken in 2021/2022 to inform the development of Midlothian's new ATS, respondents were also asked about public transport services. Key problems identified included:

- Long journey times by bus to Edinburgh
- Insufficient public transport connectivity between different areas of Midlothian
- Lack of connectivity to the Pentlands

6.3.5 The above findings along with the results of the Stakeholder Engagement undertaken to inform the development of this Stage 1&2 Technical Report (see Appendix B) have been used to help populate the problems framework as detailed below and will be a vital input into the subsequent option development process.

## 6.4 Problems Around Bus Travel in Midlothian

Problem Theme	Transport Problem	Supply Side Cause(s)
Awareness of travel options	I am not aware of the bus services available to me / cannot access bus service information	<ul style="list-style-type: none"> <li>- A particular issue for occasional or infrequent users, including visitors to Midlothian for whom information has to be readily accessible, understandable and reliable</li> <li>- Level of, accessibility of, and promotion of bus routes, fares and vehicle information by all stakeholders providing services in Midlothian</li> </ul>
Cost of travel	I cannot afford to travel by bus regularly  Travelling by bus uses a high proportion of my disposable income	<ul style="list-style-type: none"> <li>- Concessionary travel entitlement regime means that some low-income groups do not benefit</li> <li>- Level of fares, including arrangements for regular bus users vary by operator</li> <li>- People who cannot afford up front cost cannot benefit from season tickets / Ridacards etc. so spend more per journey</li> <li>- People unable to / not comfortable with using apps etc may have to pay full single fares</li> </ul>
Environmental concerns	I am concerned about the environmental impact of travelling by bus	<ul style="list-style-type: none"> <li>- Many buses serving Midlothian are diesel powered</li> </ul>
Fuel / power issues	Electric buses cannot be charged in Midlothian limiting their use on Midlothian routes	<ul style="list-style-type: none"> <li>- There are no depots / charging facilities in Midlothian for buses</li> </ul>
Integration of travel to onward modes	I cannot realistically take a bus to catch the train  I have to buy two tickets to travel by bus and rail which is a hassle	<ul style="list-style-type: none"> <li>- lack of bus services which connect directly to Midlothian's rail stations</li> <li>- Competition between rail and bus services limits the incentives to provide combined offering</li> <li>- Limited availability of, and or lack of awareness of integrated PlusBus bus / train tickets</li> </ul>
Journey information	I don't know if my bus is going to be on time	Absence of real time journey bus information at bus stops and via apps etc.
Journey quality	Travelling by bus does not feel like a high quality experience	<ul style="list-style-type: none"> <li>- Absence of other facilities such as reliable Wi-Fi and plug points on some routes</li> <li>- Age and quality of some vehicles</li> <li>- Customer experience / driver interaction</li> <li>- Driving standards can vary (e.g., acceleration / braking)</li> <li>- On board temperatures can be too hot or too cold</li> <li>- Quality of bus stop infrastructure can be poor</li> <li>- Quality of road surfaces makes by travel noisy and uncomfortable</li> <li>- Ride quality on vehicles</li> </ul>
	I cannot easily work on the bus	<ul style="list-style-type: none"> <li>- Absence of / limited availability of tables</li> <li>- Quality of road surfaces and level of comfort can lead to motion sickness</li> </ul>
	I am exposed to weather at bus stop	<ul style="list-style-type: none"> <li>- Inadequate availability / quality of bus shelters</li> </ul>

Problem Theme	Transport Problem	Supply Side Cause(s)
Journey times	It takes a long time to travel by bus, particularly compared to travel by car	<ul style="list-style-type: none"> <li>- Circuitous service routing</li> <li>- Bus travel to many key employment and other locations requires at least one interchange as bus services generally run radially between Edinburgh city centre and Midlothian</li> <li>- Routine congestion which affects bus timetabling associated with absence of bus priority at key locations</li> <li>- Absence of bus priority (vehicle detection) at signalised junctions</li> <li>- High frequency of bus stops</li> <li>- Road formation, use of bus lay-bys, alignment and quality means that average speeds are low</li> <li>- bus stop dwell times can be long as drivers have to process each passenger</li> </ul>
	It takes a long time to walk to the nearest bus stop	<ul style="list-style-type: none"> <li>- Many households are located further from a bus stop than is desirable as many routes serve the main Midlothian corridors only</li> <li>- Difficulty accessing public transport in some development locations, sometimes due to low housing density</li> <li>- Some residential developments are not designed to accommodate bus services</li> <li>- Lack of bus service to key visitor locations, e.g., Vogrie Country Park</li> </ul>
Personal accessibility	I find it difficult to, or am unable, to travel by bus due to a disability	<ul style="list-style-type: none"> <li>- Absence of journey assistance offer for those unable to travel unaccompanied</li> <li>- Access and egress routes to / from bus stops</li> <li>- Combination of bus station / stop location and design, and bus design</li> <li>- Issues with driving standards</li> <li>- Limited space for wheelchairs on board means I sometimes cannot get on the bus</li> <li>- Buses are sometimes standing room only limiting access for those that require a seat</li> <li>- Not all bus stops are fully accessible</li> </ul>
Personal security (fear of crime)	I do not feel secure travelling on the bus	<ul style="list-style-type: none"> <li>- Anti-social behaviour on buses, perhaps amplified by recent Under 22s free travel initiative</li> <li>- Infection control measures in the wake of the COVID-19 pandemic</li> <li>- Lack of CCTV on board all buses</li> <li>- Low bus occupancy in places can make people feel vulnerable</li> </ul>
	I do not feel secure at bus stops	<ul style="list-style-type: none"> <li>- Absence of formal bus stops in some rural locations where buses can be hailed at any safe spot</li> <li>- Absence of other people passing in area of bus stops</li> <li>- Anti-social behaviour in the vicinity of bus stops</li> <li>- Combination of bus station and bus stop location and design, lighting</li> <li>- Lack of CCTV coverage</li> </ul>
Reliability of journey times (including public transport service punctuality)	Journey times by bus are not reliable	<ul style="list-style-type: none"> <li>- Delays due to driver availability issues</li> <li>- Delays due to incidents on the road</li> <li>- Delays due to routes which are more congested than normal and associated absence of bus priority in all areas where congestion can be a problem - these issues will be further pronounced with projected population growth if accompanied by increased road traffic</li> <li>- Delays due to vehicle mechanical issues, sometimes associated with older vehicles</li> </ul>

Problem Theme	Transport Problem	Supply Side Cause(s)
		- Long route distances for services which run from the Borders to Edinburgh – adds to scope for delay
	My bus is sometimes cancelled meaning a long wait until the next one	- Driver availability issues - Vehicle mechanical issues, sometimes associated with older vehicles
Safety	<i>No issues identified</i>	
Capacity	I sometimes cannot get on the bus	- Bus is full and does not stop - Use of single deck buses where there is normally a double decker
Comfort	I do not find travel comfortable	- Some of the bus fleet is ageing which will impact on ride comfort, noise, temperature control etc. - Buses being busy and having to stand
Connectivity / network coverage	There are no bus services where I live	- Absence of services in some settlements in rural areas (e.g., Auchendinny, Cousland) - Difficulty accessing public transport in some new development locations
	There are bus services but they don't go where I want to go	- Limited east-west bus services connecting rural areas and localities within Midlothian - Coverage provided by current scheduled bus and DRT network - Lack of direct connections to key locations across Edinburgh - Lack of bus connections to key visitor attractions e.g. Vogrie Country Park
Integration between services (within mode, e.g., bus to bus)	I have to change buses to get where I want to go	- Current timetables and routeing options which are mainly radially focussed between Midlothian and Edinburgh
	I have to buy two tickets to travel by different operators	- Absence of multi-journey or multi-day tickets across different operators
Service reliability (cancellations)	The bus sometimes does not show up	- Cancellations due to driver shortages - Cancellation due to vehicle issues - Cancellations due to incident on the road network caused by traffic incident or weather
Timetables (first and last / frequency)	The bus service is not frequent enough meaning bus travel is inconvenient	- Service frequency lower in more rural areas and is beyond the reach of some
	There is no bus at the time I want to travel	- Extent of current scheduled bus timetable means some communities do not have e.g., an evening service, such as Pathhead - limited network in more rural areas
	I can't get to early morning appointments / shift work or attend late night social events / shift work by bus	- Extent of current scheduled bus timetable means some communities do not have e.g., an evening service, such as Pathhead - limited network in more rural areas
	I can't use the bus on a Sunday	- Extent of current scheduled bus timetable means that some communities have a very limited or no service on a Sunday





Problem Theme	Transport Problem	Supply Side Cause(s)
Long term uncertainty around services	I don't feel I can rely on bus services in the long term	<ul style="list-style-type: none"><li>- Long-range services which originate beyond Midlothian at least in part rely on funding contributions from other local authorities</li><li>- Services can be changed / withdrawn at short notice</li><li>- Some routes (e.g., Dumfries-Edinburgh) have a long history of threatened withdrawal</li><li>- Bus services have been reduced over time due to cost and human resource issues</li></ul>



## 6.5 Rail

### Rail network

- 6.5.1 The Borders Rail Line is the only rail line in Midlothian (see Figure 6-17). The line opened in September 2015 and connects Tweedbank and Galashiels in the Scottish Borders with Edinburgh City Centre. There are four stations located in Midlothian, namely Gorebridge, Newtongrange, Eskbank, and Shawfair. As discussed above, Shawfair was identified as a Strategic Development Area in the Midlothian 2017 LDP and there has been significant development in this location in recent years.
- 6.5.2 The Borders Railway was built as a largely single-track line with passive provision for electrification. The route includes three dynamic passing loops providing around 15km of double track which enables the provision of half hourly services. The Scottish Government has committed to decarbonising the route and the most recent Network Rail Delivery Plan update on Scotland's Railway noted that this would be achieved by 2024<sup>24</sup>.
- 6.5.3 Services are provided using a mix of Class 158 Express Sprinter diesel multiple units (DMU) and more recently Class 170 Turbostar DMU trains. Both (especially the latter) are relatively modern rolling stock offering a good quality of journey.

**Key point:** The east of Midlothian benefits from good rail links to Edinburgh via the Borders Rail Line with a relatively frequent service, long operating hours, and journey times which are quicker than the equivalent journey by car. There are, however, no rail links in the west of the local authority area.

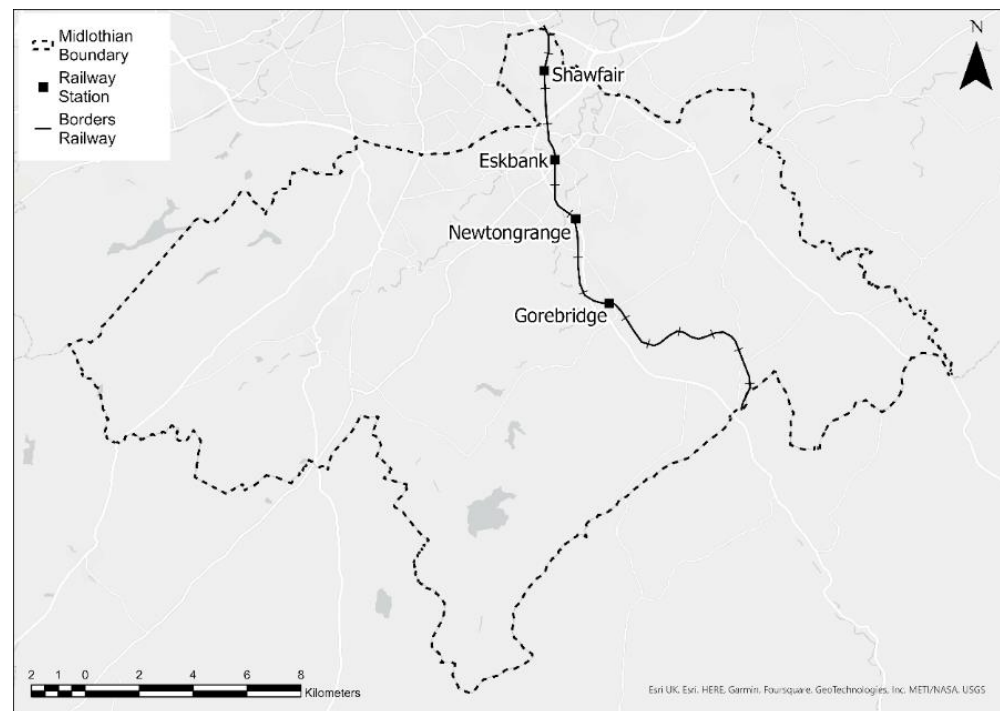



Figure 6-17: Midlothian Rail Network

- 6.5.4 Table 6-4 provides a summary of the operating hours on weekdays, Saturdays, and Sundays on the route along with an approximate journey time from each station to Edinburgh Waverley.
- 6.5.5 There are two trains per hour in each direction from each station in Midlothian during the week / Saturdays and an hourly service on Sundays. Operating hours are long, with, on weekdays and Saturdays, the first train to Edinburgh between 06:00 and 06:30 and the last train back to Midlothian at approximately 23.45. The operating day is slightly reduced

<sup>24</sup> [Scotland's Railway delivery plan \(networkrail.co.uk\)](https://www.networkrail.co.uk/Scotland's%20Railway%20delivery%20plan)



on Sunday with the first departures post 09:00 and the last train from Edinburgh at 23.11. Journey times from the rail stations to Edinburgh are generally quicker by rail than by car, particularly during the morning and evening peaks.

### Station facilities

- 6.5.6 Free parking is provided at each of the stations (see Table 6-5). All four of the Midlothian stations are single platform and have step-free access and are therefore classified as 'Category A' stations under ScotRail's accessibility classification system. None of the stations have a staffed ticket office. Eskbank and Gorebridge Stations are completely unstaffed, while Shawfair and Newtongrange have on-train staff who can provide help to boarding and alighting passengers.

**Key point:** The east of Midlothian benefits from good rail links to Edinburgh via the Borders Rail Line with a relatively frequent service, long operating hours, and journey times which are quicker than the equivalent journey by car. There are, however, no rail links in the west of the local authority area.

Table 6-4: Operating Day and Journey Time to Edinburgh on the Borders Railway  
(ScotRail train times 21<sup>st</sup> May – 9<sup>th</sup> December 2023<sup>25</sup>)

Station	Weekday		Saturday		Sunday		Approximate Journey Time to Edinburgh Waverly
	First Train (to Edinburgh)	Last Train (From Edinburgh)	First Train (to Edinburgh)	Last Train (From Edinburgh)	First Train (to Edinburgh)	Last Train (From Edinburgh)	
Shawfair	06:32	23:43	06:32	23:44	09:28	23:11	14 minutes
Eskbank	06:25	23:43	06:25	23:44	09:24	23:11	19 minutes
Newtongrange	06:22	23:43	06:22	23:44	09:21	23:11	22 minutes
Gorebridge	06:19	23:43	06:19	23:44	09:18	23:11	25 minutes

Table 6-5: Number of parking spaces at each rail station in Midlothian

Station	Car spaces <sup>26</sup>	Disabled spaces <sup>27</sup>	Electric vehicle charging spaces <sup>28</sup>	Cycle parking
Shawfair	53	3	2	20
Eskbank	248	11	2	30
Newtongrange	53	3	2	20
Gorebridge	73	5	2	20
Total	427	22	8	90

<sup>25</sup> [sr492\\_edinburgh-newcraighall\\_tweedbank\\_may\\_2023.pdf](https://www.scotrail.co.uk/sr492_edinburgh-newcraighall_tweedbank_may_2023.pdf) (scotrail.co.uk)

<sup>26</sup> [ScotRail station information](https://www.scotrail.co.uk/station-information) (accessed July 2023)

<sup>27</sup> [ScotRail station information](https://www.scotrail.co.uk/station-information) (accessed July 2023)

<sup>28</sup> <https://chargeplacescotland.org/>

## Rail fares

- 6.5.1 The current single and return fares to Edinburgh from each station in Midlothian are set out in the table below.

Table 6-6: Cost of single and return tickets to Edinburgh from each station in Midlothian

	Single	Return
Shawfair	£4.10	£4.40
Eskbank	£5.40	£5.70
Newtongrange	£5.90	£6.20
Gorebridge	£6.60	£7.00

- 6.5.2 As part of the ScotRail Peak Fares Removal Pilot, between 2<sup>nd</sup> October 2023 and 29<sup>th</sup> March 2023, all off-peak fares and products that are set and controlled by ScotRail are valid for travel all day<sup>29</sup>. This has resulted in a significant reduction in fares for commuters with a fall in the cost of a peak time return ticket to Edinburgh of between £2.30 and £3.70 depending on origin station. While rail travel is not included in the National or Under-22s Concessionary Travel Schemes, paid railcards are available. The OneTicket scheme above which allows travel across multiple operators (bus and rail) does not cover the Borders Railway.

## Rail demand

- 6.5.3 Figure 6-18 shows the total passenger entries and exits as recorded in the Office for Road and Rail (ORR) data since the Borders Railway opened in 2015 for each Midlothian station. It is noted that since the line opened in September, the data for 2015-16 does not represent a whole year.

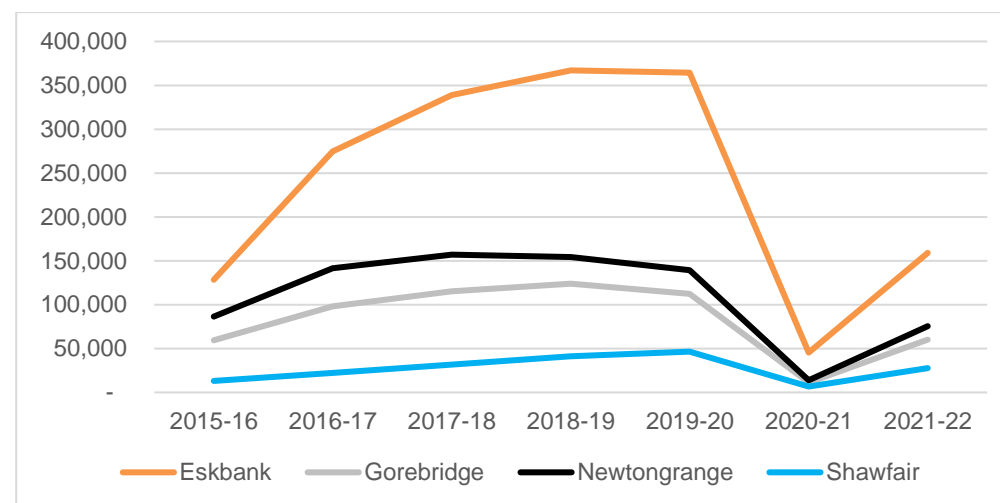


Figure 6-18: Passenger entries and exits by station 2015/16 – 2021/22 (Office of Road and Rail, 2022)

- 6.5.4 Overall, Eskbank is the busiest station in Midlothian, accounting for nearly 50% of the total number of passengers using the service from one of the Midlothian stations. This is followed by Newtongrange, Gorebridge, and Shawfair.
- 6.5.5 Since the line opened in 2015, the number of people using the service had been steady increasing, reaching a peak in 2018/19. The rate of increase in passenger numbers at Shawfair was particularly high over this period, with numbers almost doubling between 2016/17 and 2019/20, reflecting significant residential development in this area during this time.
- 6.5.6 From 2019/20 there was a significant fall as a result of the COVID-19 pandemic, with COVID-19 restrictions continuing into 2022. While station by station ORR data is not yet available post 2021/22, the most recent GB level datasets

<sup>29</sup> <https://www.transport.gov.scot/news/peak-fares-removal-pilot-dates-confirmed/>

indicate that rail usage has not yet returned to pre-COVID-19 levels. Data published by the ORR<sup>30</sup> shows that in the quarter January to March 2023) national passenger journeys were **88%** of the same quarter four years ago (i.e., pre-pandemic), however if the Elizabeth Line (which has had a major impact on the statistics) is excluded from the comparison this reduces to **73%**.

**Key point:** Use of the Midlothian Borders Railway stations had been increasing since the stations opened in 2015. However, there was a sharp fall in numbers as a result of COVID-19. While station by station counts covering the post-COVID period are not currently available, national level datasets indicate that rail use has not yet returned to pre-COVID-19 levels.

Punctuality

- 6.5.7 ScotRail publishes figures covering the following for the terminal stations on the ScotRail network:
- **On time** – the percentage of services which terminate at the station on time, where ‘on time’ is defined as arriving within 59 seconds of their booked arrival time, having called at all booked stations on the route
  - **Public Performance Measure (PPM)** - the percentage of ScotRail services that arrive within 5 minutes of their booked arrival time, having called at all booked stations on the route
- 6.5.8 Data for Tweedbank (the terminal station of the Borders Railway) for the 12-month period up to mid-September 2023 is set out in Table 6-7.

Table 6-7: Punctuality data for the Borders Railway (Source: ScotRail<sup>31</sup>)

	On time	PPM
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Tweedbank	51.7%	88.2%
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6.5.9 The target PPM figure for the entire ScotRail network is 92.5%. The above data for Tweedbank is below this figure and suggests that punctuality is an issue on the Borders Railway.

**Key point:** the most recent data suggests that the Borders Railway is not meeting ScotRail’s PPM.

6.6 Findings from previous public engagement activities

6.6.1 Figure 6-19 shows satisfaction with the rail services amongst Midlothian respondents to the 2021 public survey undertaken to inform the SEStran RTS. Responses are shown for only those who indicated that they typically travel by train at least monthly.

<sup>30</sup> <https://dataportal.orr.gov.uk/media/2207/passenger-rail-usage-jan-mar-2023.pdf>

<sup>31</sup> <https://www.scotrail.co.uk/performance-and-reliability>

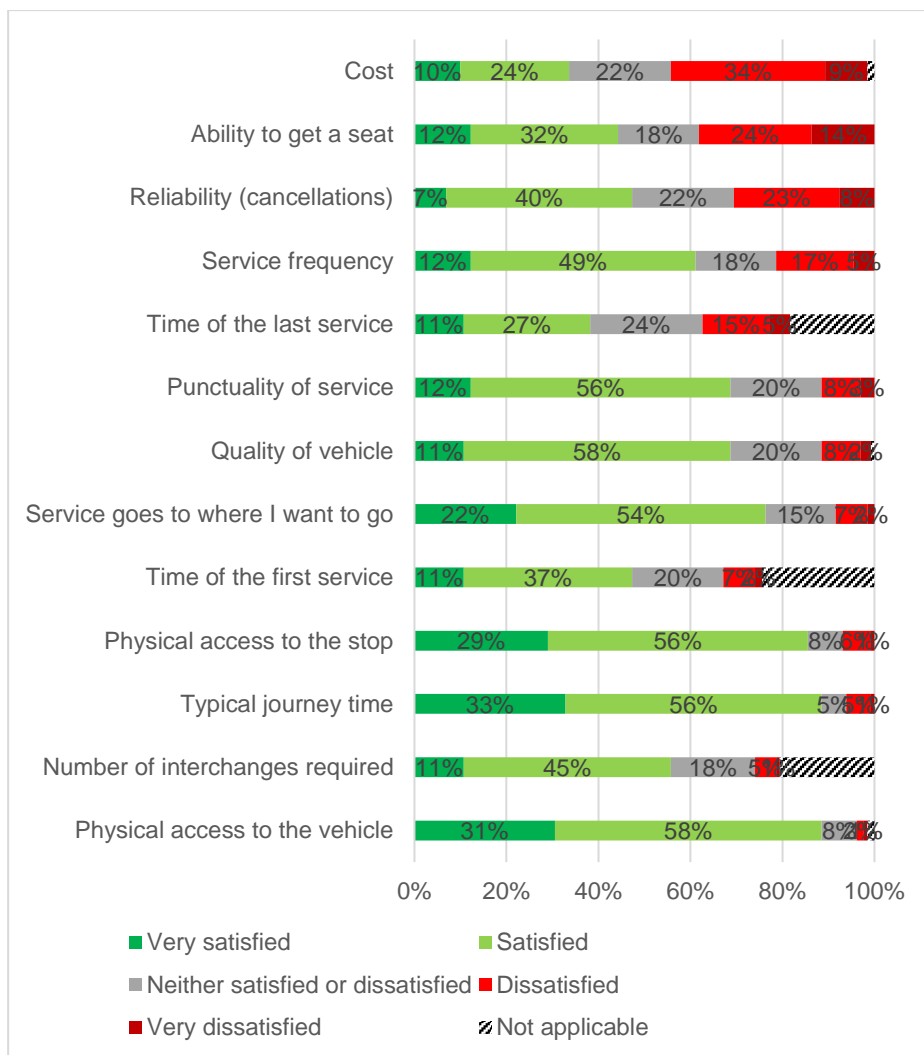


Figure 6-19: Satisfaction with the train prior to the Pandemic (n=131) (Source: SEStran Regional Transport Strategy Public Survey 2021)

6.6.2 The highest levels of dissatisfaction were with the cost of rail travel. Satisfaction with rail fares may now be slightly higher than in 2021 given the ScotRail Peak Fares Removal Pilot. There were also high levels of dissatisfaction with the ability to get a seat, and service reliability and frequency. Where respondents indicated they were dissatisfied with certain aspects, they were also invited to provide further comments if they wished. The key points raised with respect to rail travel were as follows:

- rail fares are too expensive (16 comments)
- poor quality trains (5 comments)
- overcrowded services (16 comments)
- poor reliability (14 comments)
- a lack of early or late services (2 comments)
- poor integration with bus services (1 comment)
- insufficient space for cyclists (1 comment)

6.6.3 The above findings along with the results of the Stakeholder Engagement undertaken to inform the development of this Stage 1&2 Technical Report (see Appendix B) have been used to help populate the problems framework as detailed below and will be a vital input into the subsequent option development process.

## 6.7 Potential Problems Around Rail Travel in Midlothian

Problem Theme	Transport Problem	Supply Side Cause(s)
Awareness of travel options	<i>No particular problems identified</i>	
Cost of travel	I can't afford to travel by train regularly	<ul style="list-style-type: none"> <li>- high cost of rail travel compared to bus travel</li> <li>- prohibitive cost of peak rail fares (temporarily resolved)</li> <li>- low awareness of discount products-</li> </ul>
	Travel by train uses a high proportion of my disposable income	<ul style="list-style-type: none"> <li>- People who cannot afford up front cost cannot benefit from season tickets so spend more per journey</li> </ul>
Environmental concerns	I am concerned about the environmental impacts when I travel by train	<ul style="list-style-type: none"> <li>- Borders Railway services are provided by diesel trains as the line is not electrified</li> </ul>
Fuel / power issues	No user problem other than 'environmental concerns' above	
Integration of travel to onward modes	<i>No particular problems identified</i>	
Journey information	<i>No particular problems identified</i>	
Journey quality	My local station has poor facilities	<ul style="list-style-type: none"> <li>- Midlothian stations are very basic – for example there are no ticket offices, waiting rooms or public toilets</li> <li>- All stations are unstaffed</li> </ul>
Journey times	Journey times by train are long compared to other rail services serving Edinburgh	<ul style="list-style-type: none"> <li>- number of station stops (6) in the 12 miles or so between Newtongrange and Edinburgh</li> <li>- line speeds</li> <li>- services slow down to join East Coast Main Line</li> <li>- use of diesel trains which are slower to accelerate and deceleration</li> </ul>
Personal accessibility	I find it difficult to, or am unable to travel by train due to a disability	<ul style="list-style-type: none"> <li>- Absence of journey assistance offer for those unable to travel unaccompanied</li> <li>- Stations have some poor access routes to / from stations</li> </ul>
Personal security (fear of crime)	I do not feel secure when travelling by train	<ul style="list-style-type: none"> <li>- Low volumes of people on train and at stations can make people feel vulnerable</li> </ul>
	I do not feel secure at rail stations	<ul style="list-style-type: none"> <li>- Low station usage levels can make users feel vulnerable</li> <li>- Unstaffed stations can make users feel vulnerable</li> </ul>
Reliability of journey times (including public transport service punctuality)	Travel by train in Midlothian is unreliable	<ul style="list-style-type: none"> <li>- The Borders Railway is mainly single track which impacts reliability</li> <li>- The Borders Railway interfaces with the East Coast Main Line which impacts reliability</li> <li>- Industrial action can affect services</li> </ul>



Problem Theme	Transport Problem	Supply Side Cause(s)
		<ul style="list-style-type: none"> <li>- Weather events, some linked to climate change</li> <li>- PPM at Tweedbank is below the ScotRail target</li> </ul>
Safety	<i>No particular problems identified</i>	
Capacity	I sometimes cannot get a seat on the train	<ul style="list-style-type: none"> <li>- overcrowding due to one-off events</li> <li>- knock on effects of train cancellations</li> </ul>
Comfort	<i>No particular problems identified other than through lack of capacity (above)</i>	
Connectivity (availability of services)	There is no railway station near where I live so it's not practical for me to use the train	- absence of rail network in the west of Midlothian
	I cannot travel south by rail beyond Tweedbank without going via Edinburgh	- the rail network terminates at Tweedbank
Integration between services (within mode, e.g., bus to bus)	I have to wait a long time to make a connection at Waverley	<ul style="list-style-type: none"> <li>- trains are half hourly and hourly on a Sunday</li> <li>- late running trains</li> </ul>
Service reliability (cancellations)	The train is sometimes cancelled	<ul style="list-style-type: none"> <li>- incidents on the line and weather events</li> <li>- train crew shortages</li> <li>- train crew shortages can cause cancellations</li> <li>- train set failures</li> <li>- PPM at Tweedbank is below the ScotRail target</li> </ul>
Timetables (first and last / frequency)	The train service is not frequent enough	- infrastructure constraints on the line preclude a more frequent service on the line
Long term uncertainty around services	<i>No particular problems identified</i>	

# 7 Road

## 7.1 Road network

7.1.1 This section provides an overview of the road network in Midlothian. While focused on car and freight use of the network, it is worth noting that the road network is also relevant for both public transport and active travel users.

7.1.2 Midlothian is traversed by several key A and B roads travelling north-south through the local authority area, the majority of which connect to the City of Edinburgh Bypass (A720) which skirts / traverses the northern extent of Midlothian (see Figure 7-1). The key routes include the:

- **A702** – trunk road which connects the Lothianburn Junction at the City of Edinburgh Bypass (A720), with the A74(M) in South Lanarkshire, passing through Hillend (Midlothian), West Linton and Carlops (Scottish Borders) and Biggar (South Lanarkshire). Within the Midlothian local authority boundary, the route skirts the eastern extent of the Pentland Hills Regional Park.
- **A701 / A703 Corridor** – which connects the Straiton Junction at the City of Edinburgh Bypass (A720), with Peebles (Scottish Borders), passing through the Straiton Retail Park, Loanhead, Bilston and Penicuik. At Leadburn at the southern extent of Midlothian, the route splits into the A701 for Moffat and the A703 for Peebles. The A6094 via Howgate is used by most north-south traffic to avoid Penicuik.
- **A7** – trunk road which connects the Sheriffhall Roundabout at the junction with the City of Edinburgh Bypass (A720) to Newtongrange and Gorebridge (Midlothian) and onward to Galashiels (Scottish Borders)
- **A68** – trunk road which connects the Millerhill Junction with the City of Edinburgh Bypass (A720) with Pathhead (Midlothian) and onward to Lauder (Scottish Borders)

- **A6904** – which connects Bonnyrigg (Midlothian) with Leadburn and the junction with the A703 / A701 in the south-west of the local authority area, passing around Rosewell.

7.1.3 In contrast to the north-south connections, direct east-west connections are more limited with the bypass providing the key east-west link.

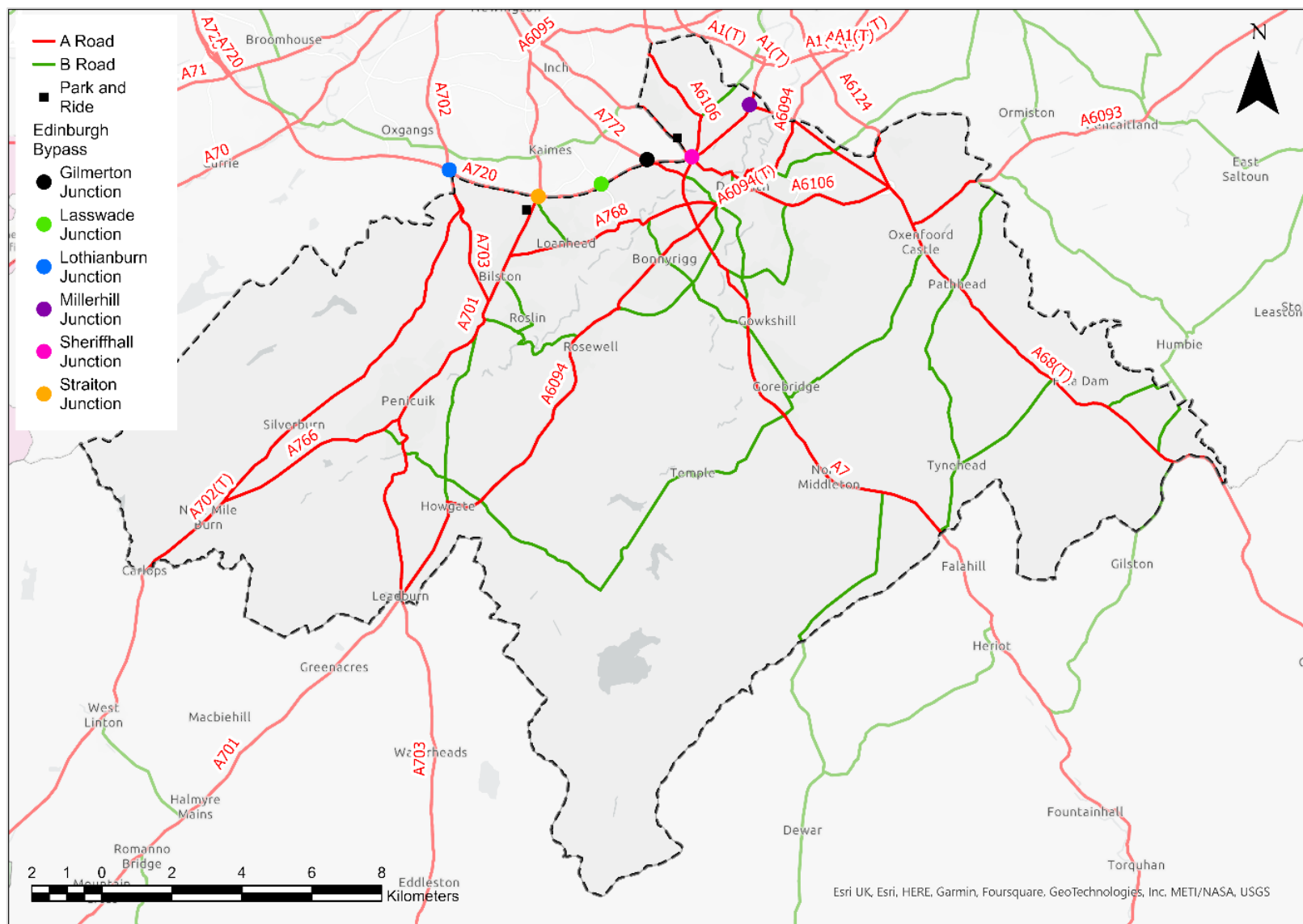


Figure 7-1: Midlothian A and B Road Overview

7.1.4 The **A720 City Bypass creates significant severance across the north of Midlothian**. There are only five crossing points by road and routine congestion and incidents on the bypass can cause north-south traffic accessing the bypass to queue back and block north-south travel.

7.1.5 As discussed in Section 5.1, **Sheriffhall Roundabout** is the only A720 at-grade junction. As a result there is often significant queuing, especially during peak hours. There has been a long-term ambition to upgrade the junction to help relieve traffic congestion and the need for grade-separation was initially identified in the first STPR in 2008, with a preferred option for the scheme identified in 2017. As previously noted, in September 2021, the Edinburgh and South East Scotland City Region Deal Joint Committee ratified their support for the scheme, with £120m of City Region Deal funding committed for its delivery. However, STPR2 (published December 2022) did not specifically reference the scheme. In early 2023, a Public Local Inquiry to consider objections received to the proposed scheme was held and the independent reporter has now made recommendations to Scottish Ministers.

7.1.6 A As discussed in Section 2.4.1 and 3.3, to ease congestion on the A701 and support development in the A701 corridor, including at the Easter Bush Campus and wider Midlothian Science Zone, the 2017 LDP identified the need for an A701 relief road. Midlothian Council completed a consultation on various route options for this link in October 2021 and subsequently announced its preferred route. Following an increase in estimated costs, the council is exploring ways to deliver the project in phases as funds become available.

**Key point:** The Edinburgh Bypass creates significant severance issues across the north of Midlothian and incidents on the bypass can cause issues on the key north south links through the local authority with significant congestion during peak hours. In terms of aspirations for improvements, there are long-term ambitions to provide grade separation at Sheriffhall Roundabout and deliver the

A703 relief road in order to help relieve traffic congestion and support development. It is understood that provision for active travel and public transport modes have been incorporated into both schemes.

## 7.2 Speed limits

7.2.1 The default speed limit for urban areas in Midlothian is currently 30mph. This is in contrast to the neighbouring authorities of the City of Edinburgh and Scottish Borders where the limit is 20mph. However, in April 2023, Midlothian Council undertook a Speed Limit Review which considered speed limits across the Council area with a view to adjusting speed limits to 20mph in appropriate locations. This review identified 850 streets where it was recommended that the speed limit should be changed from 30mph to 20mph and just 70 streets where it was recommended that the current 30mph speed limit be retained. The Speed Limit Review was subsequently approved by Councillors in May 2023 and the statutory process to introduce the new speed limits and associated traffic calming measures is now underway.

## 7.3 Traffic volumes

7.3.1 Figure 7-2 shows motorised vehicle traffic levels in Midlothian between 2000 and 2021, split between trunk roads and local authority roads.

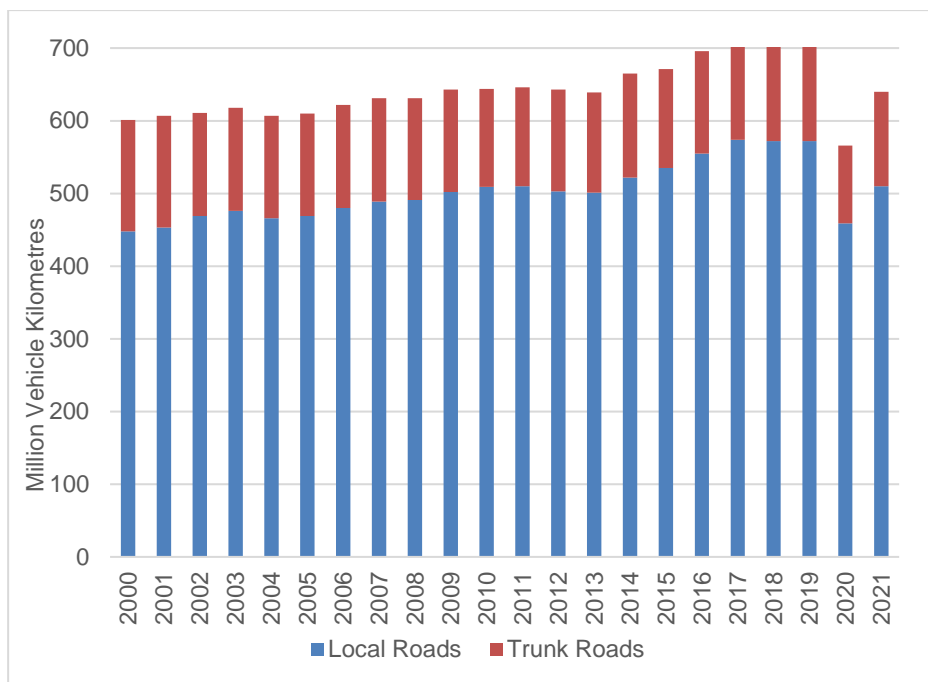


Figure 7-2: Motorised traffic in Midlothian between 2000 and 2021 (Scottish Transport Statistics)

7.3.2 Traffic levels were therefore broadly flat between 2000 and 2013 (up 6% in 13 years) before growing faster between 2013 and 2019 (up by 13% in six years). During the COVID-19 pandemic, there was a fall of around 20% with the data indicating that there has been some level of recovery to pre-COVID-19 levels by 2021. This pattern broadly reflects the growth in population between 2010 and 2021, with population growing by 12% over this period compared to a 11% growth in traffic or so seen previously.

7.3.3 At the Great Britain level, as of September 2023, 'car' traffic has returned to pre-pandemic levels with 'all motor vehicle' traffic (which includes commercial vehicles) typically at or slightly above pre-pandemic levels. This is important context

and illustrates the scale of the challenge associated with Transport Scotland's target to reduce car-kilometres by 20% by 2030 (based on 2019 traffic).

7.3.4 Data from Transport Scotland's permanent count sites on the key routes in Midlothian was collated to determine the current Average Annual Daily Traffic (AADT) flows. Figure 5:2 shows the 2022 AADT flows and percentage HGVs at the count sites across Midlothian.



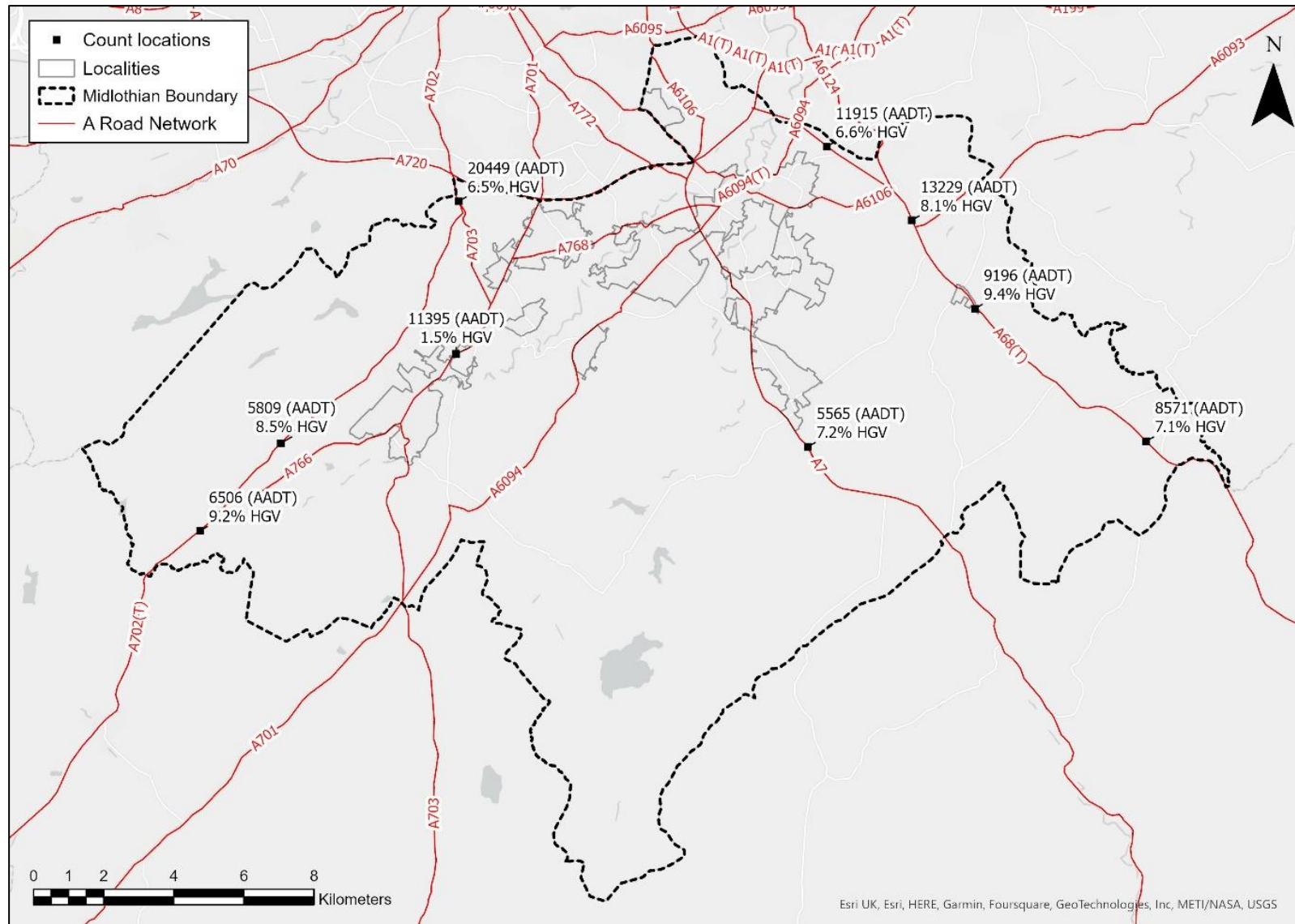


Figure 7-3: 2022 AADT Counts on key routes

- 7.3.5 As shown, AADT flows are higher further north in Midlothian, reflecting the dominate traffic flows to and from Edinburgh. Flows are particularly high at the junctions on the Edinburgh City Bypass, with around 20,500 vehicles per day on the A703 south of the Lothian Burn junction and 12,000 vehicles per day on the A68 south of the Millerhill junction.

**Key point:** Traffic levels in Midlothian have grown broadly in line with population increases in the recent period and have now likely returned to pre-COVID-19 levels. Given the significant level of development planned, should this continue to the case, vehicle kilometres and traffic congestion in Midlothian would increase. In line with wider policy, the LTS must focus on both reducing the need to travel and encouraging the use of sustainable modes.

## 7.4 Journey time reliability

- 7.4.1 Traffic congestion is a regular problem which affects many routes in Midlothian. In order to assess journey time reliability in the local authority area, 2022 INRIX journey time data on license from Transport Scotland<sup>32</sup> was reviewed for the corridors shown in Figure 7-4. Table 7 1 shows the traffic profile across the day on each of these corridors and provides a summary of the key trends in each case. The discussion includes comparisons between the 5th (fastest) and 95th (slowest) percentile journey times, with large differences between these figures indicating that journey times are variable and therefore the routes are more congested.

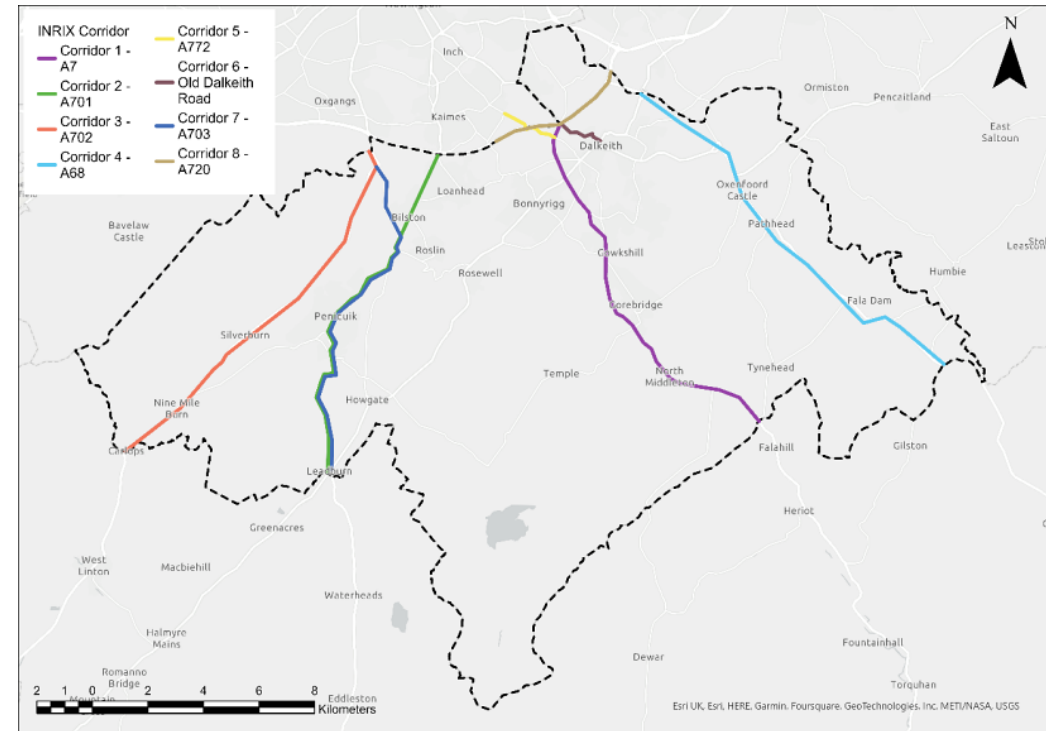


Figure 7-4: Road Corridors for which INRIX journey time data was reviewed

<sup>32</sup> <https://inrix.com/products/speed/>, with permission from Transport Scotland





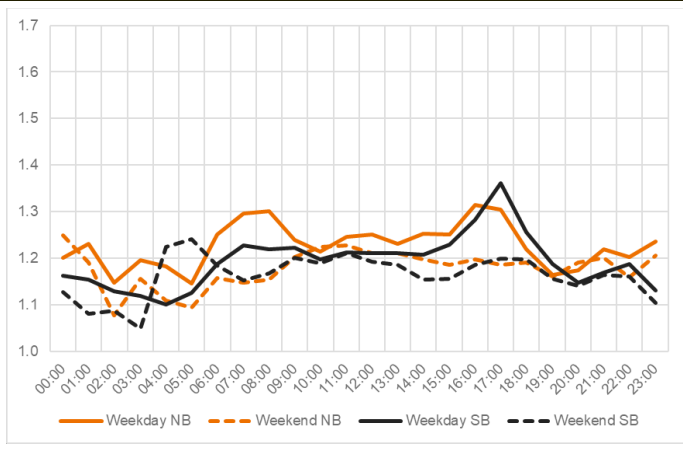
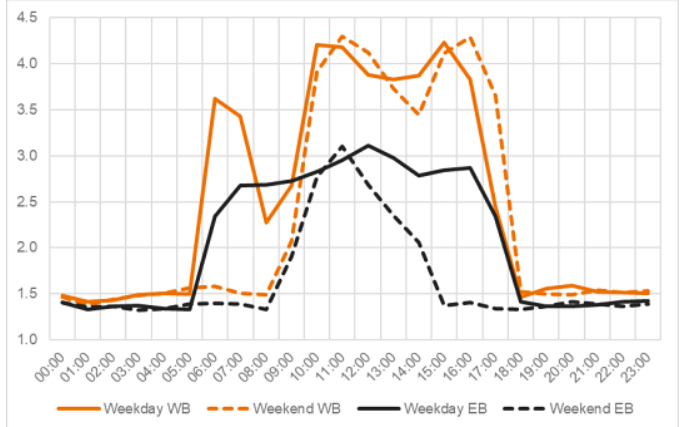
Table 7-1: Journey time variability for key road corridors in Midlothian

Route	Northbound and Southbound traffic across the day – Weekday and weekend	Comments
(1) A7 Middelton-Sheriffhall		<p>The greatest variability is seen in the northbound AM peak associated with queuing at Sheriffhall where the slowest journeys can be 24 minutes compared to a free flow time of around 13 minutes.</p> <p>Weekend variation peaks northbound around the middle of the day</p> <p>Southbound variation is greatest in the PM peak period although not as significant as for the AM peak northbound.</p>
(2) A701 Leadburn to Straiton		<p>Outbound traffic from Edinburgh in the weekday PM peak sees the highest variability with the 95<sup>th</sup> percentile journey time some 8 minutes longer than the 5<sup>th</sup> percentile journey time.</p> <p>The PM peak sees more variability than the AM inbound period.</p> <p>Weekend journey time variability peaks around midday reflecting traffic to the Straiton retail park.</p>
(3) A702 Carlops to A720 Hillend		<p>Northbound weekday AM peak travel sees the greatest variability with a 95<sup>th</sup> percentile time of 18 minutes compared to an uncongested time of 11 minutes.</p> <p>This northbound route can be affected by traffic queuing back from the Edinburgh City Bypass.</p>



Route	Northbound and Southbound traffic across the day – Weekday and weekend	Comments
(4) A68 Midlothian		<p>The A68 on this section includes the relatively recent A68 northern bypass section to the A720.</p> <p>There is much less variability on this route than the others considered here indicating the road is generally free flow reflecting the absence of junctions and high route standard.</p>
(5) A772 (A7 to B701)		<p>This is a short section so journey time variability is exaggerated.</p> <p>Eastbound PM peak weekday traffic sees significant variability of journey times.</p>
(6) Old Dalkeith Road – Dalkeith to A720		<p>This is a short section so journey time variability is exaggerated.</p> <p>As expected westbound (to Sheriffhall) traffic sees the greatest variation associated with traffic conditions at Sheriffhall.</p>



Route	Northbound and Southbound traffic across the day – Weekday and weekend	Comments
(7) A703 Leadburn to Hillend		Weekday northbound traffic experiences the largest variability with peaks in the AM and PM period. Southbound traffic sees a larger peak in the PM period.
(8) A720 A68 to Lasswade junctions		Freeflow conditions on this section of the A720 would see travel times of around 3 minutes. 95 <sup>th</sup> percentile travel times increase to 12 minutes westbound for much of the day. The A720 therefore evidences very significant levels of journey time variability which would be amplified across a longer stretch of the route.

**Key point:** The significant routine and less predictable congestion which affects many routes in Midlothian leads to variable journey times. This means that more time needs to be allowed for trips which require arriving at a certain time. This affects personal travel and also commercial vehicle traffic. The levels of routine congestion in Midlothian suggests that many routes are currently operating beyond capacity. Given this, any additional traffic associated with new development would likely have a considerable impact on congestion, with even small increases leading to significant delays.

## 7.5 Road Collisions

7.5.1 Figure 7-5 shows the location of the collisions involving vehicles in Midlothian during the period 2013 to 2022, with the colours in each case indicating casualty severity. It is noted that the below map includes the collisions shown in Figure 5-7 and Figure 5-8 where the collision involved both a pedestrian and a vehicle or a cyclist and a vehicle.

7.5.1 In total, there were 1,347 collisions involving vehicles in Midlothian during this period, a 35% fall on 2013 figures. In total, there 1,823 casualties. Of these, the majority (81.3%, n=1,482) were categorised as slight, while 17.4% (n=318) were serious and 1.3% (n=23) were fatal. As would be expected, the location of collisions reflects traffic patterns with higher concentrations on the northern sections of the key routes in the local authority area.

## 7.6 Parking

### Park and ride

7.6.1 There are two bus park and ride (P&R) sites in Midlothian (these are shown in Figure 7-1). These are as follows:

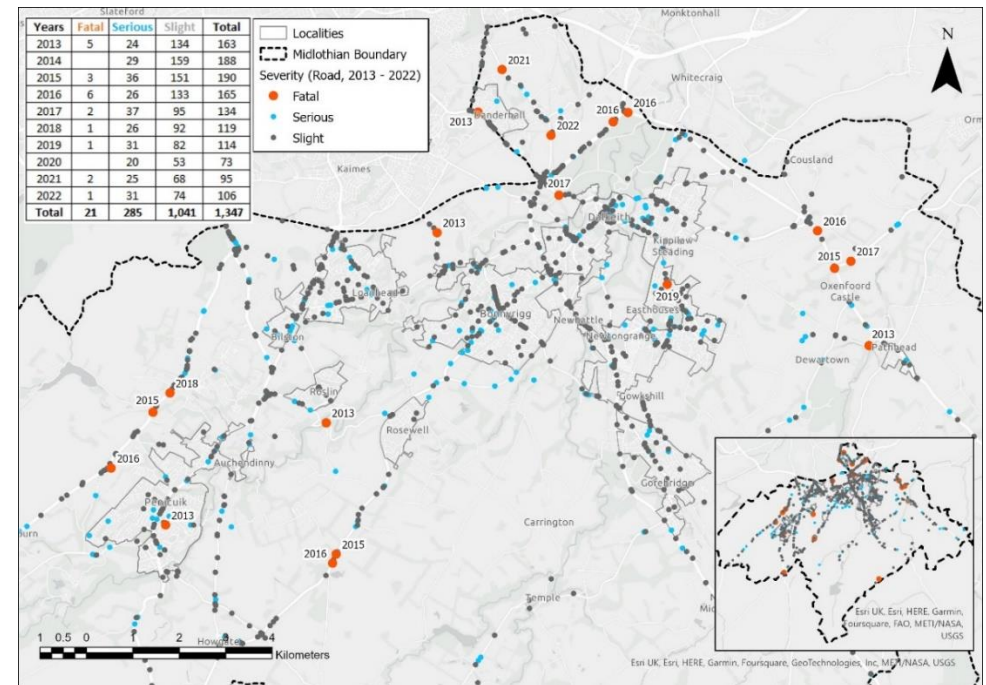


Figure 7-5: Road Collisions between 2013 and 2022 by casualty severity

- **Straiton P&R** – located to the south of the Edinburgh Bypass near the Straiton Retail Park. This facility is operated by the City of Edinburgh Council. It has 600<sup>33</sup> spaces and is served by the following bus services:
  - Service x37 (Penicuik / Loanhead-Granton via Edinburgh City Centre) – peak express service with three AM services to Edinburgh and three PM return services to Straiton
  - Service 47 (Penicuik – Cammo via Edinburgh City Centre) – Every 20 minutes

<sup>33</sup> [Straiton Park and Ride – The City of Edinburgh Council](#)



- Service 47B (Penicuik – Cammo via Easter Bush and Edinburgh City Centre) - Peak time service with nine AM peak services to Easter Bush and six PM peak services to Edinburgh / Cammo
- **Sheriffhall P&R** – located to the north of the Edinburgh Bypass and Sheriffhall Roundabout at Danderhall. This facility has 561 spaces<sup>34</sup> and is served by the following bus services:
  - Service 33 (Wester Hailes to Millerhill via Edinburgh City Centre) – Every 20 minutes
  - Service 48 (Gorebridge to Musselburgh via Fort Kinnaird – Every 30 minutes
- 7.6.2 Both Straiton P&R and Sheriffhall P&R are purpose-built sites and operate 24 hours a day. Parking is free and a single Lothian Bus ticket costs £2.00. The sites are now unstaffed, and the facilities buildings are not currently in use. This has led to some security concerns amongst some users. Midlothian Council upgraded the lighting at Sheriffhall P&R in 23/24 and CCTV at the site will be upgraded in 2024.
- 7.6.3 The SEStran Park and Ride Strategic Study, produced in June 2020 noted that neither P&R was operating at capacity, with Sheriffhall 70% utilised and Straiton just 25% utilised at that time.<sup>35</sup>
- 7.6.4 There is no evidence as to the origins of those using the P&R sites and the destinations to which people are travelling to.

### Town centre parking

- 7.6.5 In total, there are nine dedicated council owned public car parks in Midlothian<sup>36</sup>. There are also council car parks associated with council buildings, such as schools. Information on the location of the dedicated council car

parking sites, the number of spaces and the max occupancy and average duration of stay at each is set out in Table 7-2. It is noted that the max occupancy and average duration of stay figures are based on surveys undertaken in May 2016 to inform the development of the 2017 Midlothian Parking Strategy and are therefore somewhat out of date. All but two of the council owned car parks are free to use with charges as set out below applicable in North Wynd and St Andrews in Dalkeith:

- 1 Hour - Free
- 2 Hours - £1.00
- 3 Hours - £2.00
- 4 Hours - £4.00
- Max - £10.00

- 7.6.6 Midlothian Council is in the process of developing new planning guidance on parking standards, which, once adopted, will set out new requirements for new planning applications in relation to bike, car (including EV) and disabled bay parking requirements. The new guidance aligns with NPF4 and includes guidance for new town centres.

<sup>34</sup> [Sheriffhall Park and Ride – The City of Edinburgh Council](#)

<sup>35</sup> See [SEStran-Park-and-Ride-Strategy.pdf](#)

<sup>36</sup> [https://www.midlothian.gov.uk/info/200294/parking/540/car\\_parks](https://www.midlothian.gov.uk/info/200294/parking/540/car_parks)

Table 7-2: Council car parks in Midlothian

Location	Car Park	Spaces	Disabled spaces	Max occupancy (May 2016)	Average duration of stay (May 2016)
Bonnyrigg	Campview Road	34	2	~80%	3.8 hours – 19% stay for more than 5 hours
	High Street	36	2	~85%	4 hours – 22% stay for more than 5 hours
Dalkeith	Croft Street	65	2	>90% most of the day	5.6 hours – 38% stay 5 -10 hours
	Ramsay Croft	250	4	+100% most of the day	6.8 hours – 58% stay 5 -10 hours
	North Wynd	90	-	~75%	<2 hours
	St Andrews	43	-	~50%	1.3 hours
Gorebridge	Hunterfield Road	64	3	80% (10-11am)	2.7 hours - 9% stay 5 -10 hours
Loanhead	Loanhead	46	3	69%	4 hours – 8% stay for 5-10 hours
Penicuik	Jackson Street	24	2	77%	4 hours - 26% stay for more than 6 hours

7.6.7 The surveys undertaken in 2016 suggest capacity was an issue in the car parks in Dalkeith with Ramsay Street particularly oversubscribed. In some locations, there were a high proportion of vehicles staying longer than 5 hours. This was attributed to people using the facilities as informal park and rides, whereby they park and commute via public transport to their place of employment in Edinburgh. The lack of a direct bus connection to Edinburgh from some localities may be contributing to this pattern.

## On-street parking and enforcement

7.6.8 In addition to dedicated public car parks, there is also on-street parking which is mostly unrestricted, particularly in residential and rural locations. There are, however, some parking restrictions in some town centre locations and in areas where road safety is a concern (e.g., at junctions or at schools). These restrictions are managed via decriminalised parking enforcement (DPE) which was introduced in Midlothian in April 2018. A high-level overview of the parking restrictions in each locality in Midlothian is set out in Table 7-3.





Table 7-3: Overview of on-street parking restrictions by locality (Source: Midlothian Council)<sup>37</sup>

Locality	Parking restrictions
Bilston	<ul style="list-style-type: none"><li>- Double yellow parking controls on the A701</li><li>- Short length (4 spaces) of on-road parking restrictions restricting stay to 30 minutes (Mon-Sat) outside shops on Meadow Place</li></ul>
Bonnyrigg	<ul style="list-style-type: none"><li>- Single / double yellow parking controls around schools and within town centre</li><li>- On-road parking restrictions in town centre restricting stay to 30 minutes (Mon-Sat)</li><li>- Vehicle loading and unloading zones in town centre</li></ul>
Dalkeith	<ul style="list-style-type: none"><li>- Single / double yellow parking controls around schools and within town centre</li><li>- On-road parking restrictions in town centre restricting stay to 30 minutes (Mon-Sat)</li><li>- Vehicle loading and unloading zones in town centre</li></ul>
Danderhall	<ul style="list-style-type: none"><li>- Single / double yellow parking controls around school</li></ul>
Gorebridge	<ul style="list-style-type: none"><li>- Single / double yellow lines on Main Street</li><li>- On-road parking restrictions outside shops on the main through route (Main Street / Station Road) restricting stay to 30 minutes (Mon-Sat)</li></ul>
Loanhead	<ul style="list-style-type: none"><li>- Double yellow parking controls on the A701</li><li>- On-road parking restrictions restricting stay to 30 minutes (Mon-Sat) in town centre on B702</li></ul>
Mayfield	<ul style="list-style-type: none"><li>- Double yellow parking controls around school and some isolated junctions.</li></ul>
Pathhead	<ul style="list-style-type: none"><li>- No parking restrictions</li></ul>
Penicuik	<ul style="list-style-type: none"><li>- Single / double yellow lines on A701</li><li>- On-road parking restrictions restricting stay to 30 minutes (Mon-Sat) in town centre on A701</li></ul>
Rosewell	<ul style="list-style-type: none"><li>- No parking restrictions</li></ul>
Roslin	<ul style="list-style-type: none"><li>- Double yellow lines at key junctions</li><li>- Vehicle loading / unloading bays on Main Street</li></ul>

<sup>37</sup> See [Parking restrictions map](#) | [Parking restrictions](#) | [Midlothian Council](#)



7.6.9 The 2017 Parking Strategy (which was produced prior to the implementation of Decriminalised Parking Enforcement (DPE)) identified a series of problems with respect to parking in Midlothian at that time along with a set of objectives and policies to be delivered to help resolve these issues. While somewhat out of date, key issues identified included:

- **Overspill parking** – parking on surrounding streets around schools, rail stations and retail parks
- **Lack of enforcement of restrictions** – leading to illegal parking and low turnover of spaces – as above DPE was introduced following the delivery of the strategy and therefore this issue is likely to be somewhat resolved
- **Balance of parking supply** – lack of balance between short, medium and long stay parking, with use of car parks and on-street provision as informal park and rides in some locations, resulting in a lack of short stay parking for those wishing to use local shops.
- **General issues with parking and loading** – including lack of disabled parking, lack of residential parking management, poor signage / lack of awareness, and loading issues.

## 7.7 Electric Vehicle Charging

7.7.1 The Scottish Government has made a legal commitment to deliver net zero carbon emissions by 2045 and set out a number of interim targets, including phasing out the need for new petrol and diesel cars and vans by 2030. While reducing car use in favour of active travel (walking, wheeling, and cycling) and public transport will be key to reaching the

overarching goals with respect to climate change, it will also be necessary for there to be a transformative shift to zero emission vehicles, such as electric vehicles (EV).

- 7.7.2 Reflective of this wider policy context, the number of EVs in Midlothian has grown by 39% between 2015-2021 and forecasts suggest there may be 4,500 EVs in Midlothian by 2026 and 15,000 by 2030<sup>38</sup>.
- 7.7.3 A lack of convenient public EV charging infrastructure has been identified as a key barrier to the uptake of EVs. Wave 7 of the DfT's National Travel Attitudes Survey (NTAS) focussed on attitudes towards ultra-low emission vehicles (ULEV)<sup>39</sup>. This found that 59% of respondents believe that there are not enough public EV charge points, with 67% stating that 'more convenient charging infrastructure' and 58% stating that 'more local chargepoints' would encourage them to buy a low emission vehicle, the third and fourth most popular responses after lower purchase and lower running costs. The availability of public EV chargepoints is particularly important for residents without access to off-road parking who have no ability to charge their vehicle at home.

As of February 2024, there were approximately 71 public EV chargepoints in Midlothian, 34 owned by the Council and 37 independently provided. Note that no private household charging infrastructure were included in these figures.

<sup>38</sup> [More information to help you fill in the survey | EV charging network consultation | Midlothian Council](#)

<sup>39</sup> <https://www.gov.uk/government/statistics/national-travel-attitudes-study-wave-7/national-travel-attitudes-study-ntas-wave-7>

7.7.4 Table 7-4 provides a breakdown of the available charge points by charger type.

Table 7-4: Existing EVCI within Midlothian (Source: Midlothian Council, ChargePlace Scotland, DfT National Chargepoint Registry)

	Destination Slow (7kW)	Destination Fast (22kW)	Rapid (50 kW)	Total
Midlothian Council	2	28	4	34
Independently Provided	14	10	13	37
<b>Total</b>	<b>16</b>	<b>38</b>	<b>17</b>	<b>71</b>

7.7.5 In common with other local authorities in Scotland, Midlothian Council is currently producing a public EV Charging Strategy using funding from the Electric Vehicle Infrastructure Fund (EVIF). The Strategy will set out how public EVCI in Midlothian will be expanded up to 2026 and will be published in mid to late 2024. The plan will be reviewed by the EVIF Programme Board who will make recommendations to Transport Scotland as to the level of EVIF capital funding to be allocated to Midlothian Council over the period up to 2026.

**Key Point:** To meet the Scottish Government's targets around phasing out petrol and diesel vehicles and cater to the increasing levels of demand for EVs in Midlothian (particularly given Midlothian's projected increase in population), there will need to be a significant expansion of public EV charging infrastructure over the coming years. This should include both public charging facilities and bus based charging facilities.

## 7.8 Car Pooling and Car Sharing

7.8.1 Car-pooling and car sharing are forms of shared mobility. They can be defined as follows:

- **Car-pooling** - ride sharing where people with similar travel requirements share one vehicle rather than make separate trips. Can be informal or organised via an organisation such as an employer or coordinated via an online platform or app via a dedicated car-pooling organisation.
- **Car-sharing** – car clubs where people share access to a vehicle, rather than sharing a journey with someone. Customers typically access vehicles by joining a car sharing organisation that provides a fleet of vehicles in the local area. Vehicles can then be booked online or via a smartphone app. The operator provides fuel, parking and maintenance with users paying a fee each time they use the vehicle.

7.8.2 There are a number of commercial carpooling websites on which you can search for particular journeys <sup>40</sup>. However, it is understood that there are no council supported / promoted car-pooling schemes and there are no formal car clubs operating in Midlothian.

**Key Point:** There is a lack of formalised council supported / promoted car-pooling and car-sharing options in Midlothian and there is potentially an opportunity through the LTS to develop such schemes.

## 7.9 Findings from previous public engagement activities

7.9.1 Figure 7-6 shows satisfaction with car travel amongst Midlothian respondents to the 2021 public survey undertaken to inform the SEStran RTS.

<sup>40</sup> For example, see [Carpool to your next destination | BlaBlaCar](#)

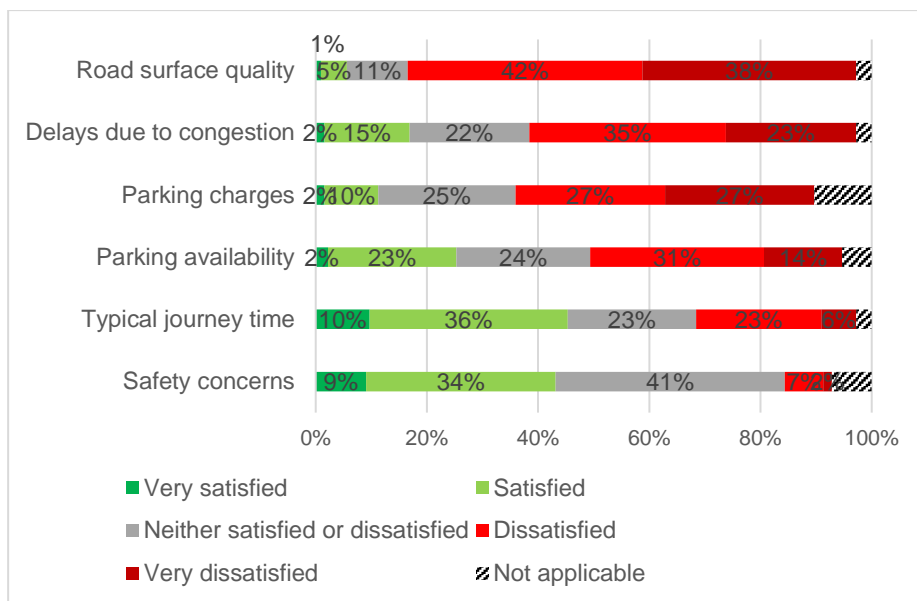


Figure 7-6: Satisfaction with car travel prior to the Pandemic (n=320) (Source: SEStran Regional Transport Strategy Public Survey 2021)

7.9.2 The highest levels of dissatisfaction were with road surface quality with over 80% (n=258) of those surveyed indicating that they were dissatisfied with this aspect. Respondents from Midlothian and Scottish Borders had the second highest levels of dissatisfaction with this aspect, differentiating by just 1% from residents of Fife (81%) which came first. All other local authorities had dissatisfaction rates of 65% or less. It should be noted though that during the engagement undertaken to inform this CfC, Lothian Buses noted that road condition and maintenance in Midlothian was reasonable compared to other locations.

7.9.3 There were also high levels of dissatisfaction with delays due to congestion for which 58% (n=188) indicated they were dissatisfied. This accords with the analysis above which

suggests several of Midlothian's key routes experience congestion delays on a routine basis.

7.9.4 Where respondents indicated they were dissatisfied with certain aspects, they were also invited to provide further comments if they wished. The key points raised with respect to car travel were as follows:

- pop-up infrastructure causing further delays
- congestion, particularly at Sheriffhall Roundabout
- poor road surface quality
- Sheriffhall P&R is poorly located and is not fit for purpose
- poor planning for new developments
- cyclists causing tailbacks.

7.9.5 The above findings along with the results of the Stakeholder Engagement undertaken to inform the development of this Stage 1&2 Technical Report (see Appendix B) have been used to help populate the problems framework as detailed below and will be a vital input into the subsequent option development process.

## 7.10 Potential Problems Around Road-Based Travel in Midlothian

Problem Theme	Transport Problem	Supply Side Cause(s)
Awareness of travel options	<i>No problems identified</i>	
Cost of travel	I cannot afford to run a car	- Cost of purchase, operation (insurance, fuel, parking, VED) and maintenance
	The cost of using a taxi is too high for me	- Higher costs during travel at anti-social hours - Absence of competition to traditional taxi model e.g., Uber-type operations
	I cannot afford an electric vehicle	- EV prices are higher than petrol / diesel equivalent and low supplies of second hand EVs mean they are unaffordable for many at present
Environmental concerns	I am concerned about the environmental impact when I travel by car or taxi	- High ongoing use of fossil fuelled vehicles generating greenhouse gases and other pollutants - Embedded carbon in EVs - Absence of alternatives to car use for many
Fuel / power issues	I cannot charge an electric vehicle at home / when away from home on a longer journey	- Lack of public EV charging infrastructure - Homes without suitable off-street parking - Cost of converting off-street space for home charging
Integration of travel to onward modes	Bus-based Park and Ride is not an attractive option	- Location of bus P&R sites, particularly in relation to congestion - Quality of / environment at P&R sites - Frequency of P&R bus services - Bus journey times from P&R sites (especially off peak when there are no limited stop services) - Connectivity provided by P&R bus services and the need to interchange
	Rail-based Park and Ride is not an attractive option	- Location of bus P&R sites, particularly in relation to congestion - Frequency of P&R train services - Train journey times from P&R sites
	I cannot park at my preferred station	- Station car parks are too small relative to demand for parking
Journey information	I do not know if there are incidents on the road when I set off	- Limited real time traffic information other than that provided by app, local radio etc
Journey quality	I find the quality of the road surfaces poor	- Level of road maintenance - Increases in severe weather events linked to climate change
	I cannot park where I need to park as a disabled person	- Lack of disabled parking bays and increasing number of blue badge holders
Journey times	Journey times by road are long for passenger travel and road freight	- Routine congestion during peak times around key hot spots including A720 junctions - parking search times at busy periods in Midlothian settlements

Problem Theme	Transport Problem	Supply Side Cause(s)
Personal accessibility	I am unable to access taxi services due to a disability	<ul style="list-style-type: none"> <li>- Availability of fully accessible taxis</li> <li>- Lack of text-based booking options for those with hearing difficulties</li> </ul>
Personal security (fear of crime)	I do not feel secure travelling by taxi	- Perception of taxi drivers / driver training and certification
	I do not feel secure when using the P&R	- Security concerns amongst some users at Sheriffhall P&R due to the facility being unstaffed
Reliability of journey times	Journey times by road are variable meaning longer journeys at times or having to leave extra time to travel for an appointment, also affects road freight and just-in-time delivery schedules	<ul style="list-style-type: none"> <li>- Congestion caused by incidents on the network – breakdowns, accidents, weather (likely to be exacerbated by climate change)</li> <li>- Congestion caused by higher-than-normal traffic levels</li> <li>- Congestion blocking back onto other roads, particularly A720 City Bypass traffic blocking back onto north-south routes</li> <li>- These issues will be further pronounced with projected population growth if accompanied by increased road traffic</li> </ul>
Safety (transport)	I am concerned about the risk of road collisions despite the reduction in the number of accidents	<ul style="list-style-type: none"> <li>- rural nature of some routes</li> <li>- road surface conditions</li> <li>- volume of traffic on Midlothian's roads</li> <li>- junction layouts at accident hotspots (e.g., A703/A702, Leadburn)</li> </ul>



## 8 Strategy Outcomes

### 8.1 Overview

- 8.1.1 As discussed in Chapter 2, the LTS sits in a policy context driven by Transport Scotland's NTS2 and the SEStran RTS. The vision and objectives associated with each of these documents is provided in full in Figure 8-1 and Figure 8-2.



Figure 8-1: National Transport Strategy Vision, Priorities and Outcomes



Figure 8-2: Regional Transport Strategy Vision and Objectives

- 8.1.2 Transport Scotland's LTSDG used the terminology of 'outcomes' rather than 'objectives', noting that 'outcomes' should encapsulate *what the local authority sees transport as enabling in their communities i.e., what do we want people to have access to - employment, education, leisure, family and friends, healthcare.*
- 8.1.3 The outcomes noted below express the transport supply-side changes we will seek to deliver through the LTS and working in partnership with others. In each case, the main resulting changes in travel behaviour and societal impacts associated with these supply side changes are noted.

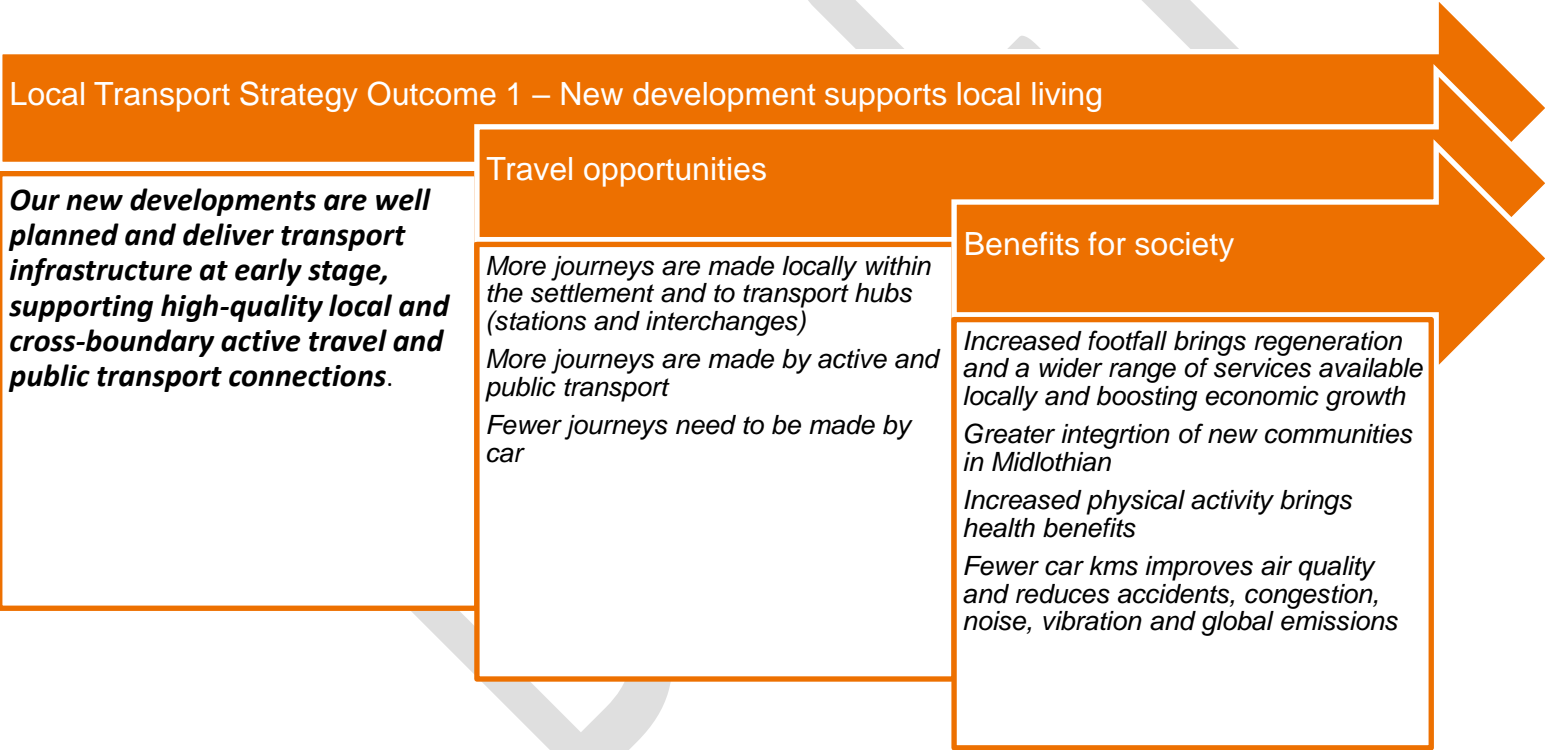




## 8.2 Local Transport Strategy Outcomes

### Local Transport Strategy Draft Outcome 1 – New development supports local living

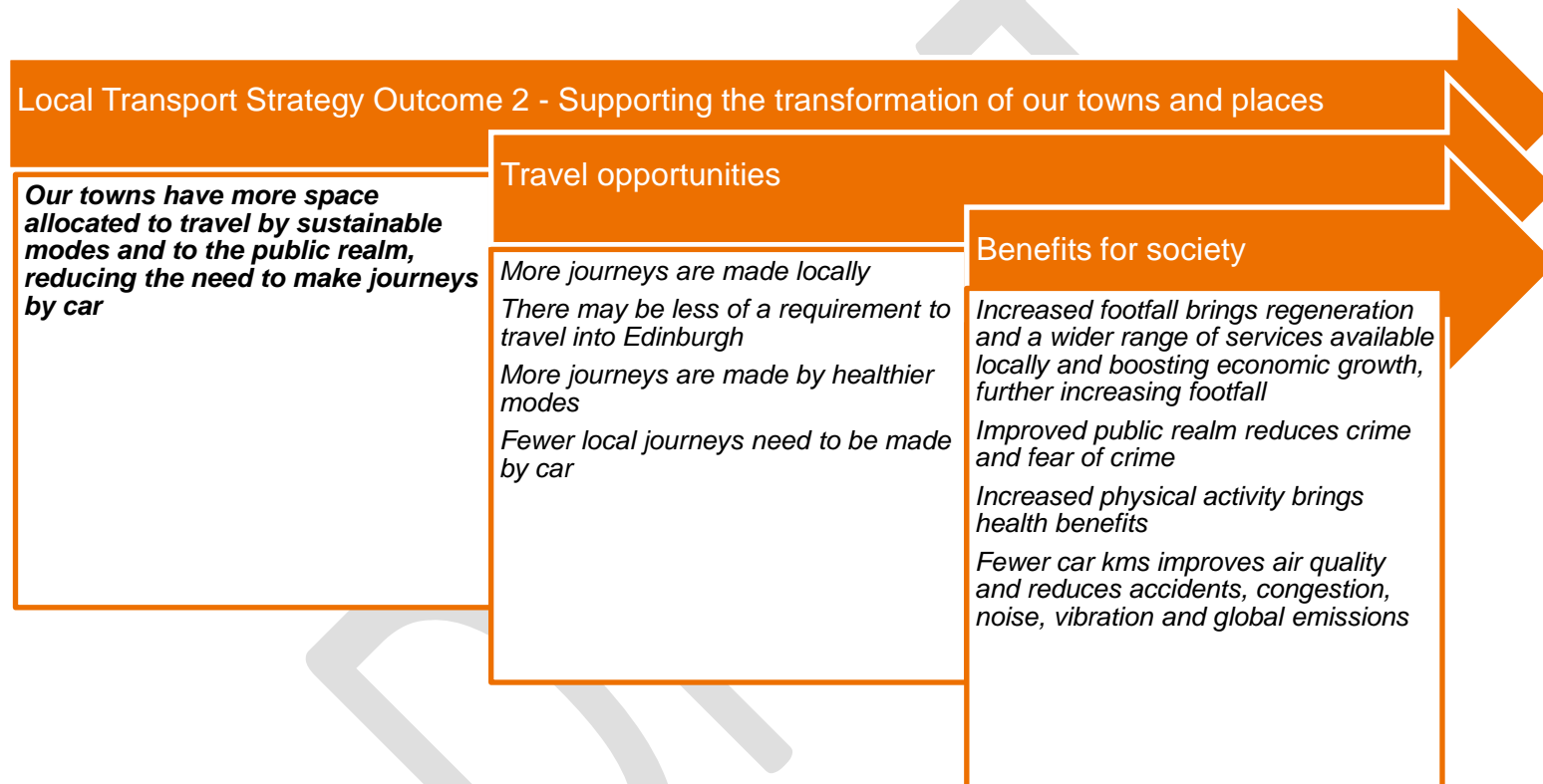
**8.2.1** Midlothian's population has grown rapidly in recent years and this growth is expected to continue in the next two decades with this being reflected in a substantial allocation of new housing. There is a risk that much of this development will generate high levels of car use which would have a range of negative impacts. If developments are not well connected to existing communities, there is a further risk of developments acting as 'dormitory' communities focussed on Edinburgh for employment, retail, leisure etc. The LTS seeks to accommodate this growth through integrating transport and land use planning and ensuring development is well connected by active travel and public transport to neighbouring towns and villages and travel hubs.





## Local Transport Strategy Draft Outcome 2 – Supporting the transformation of our towns and places

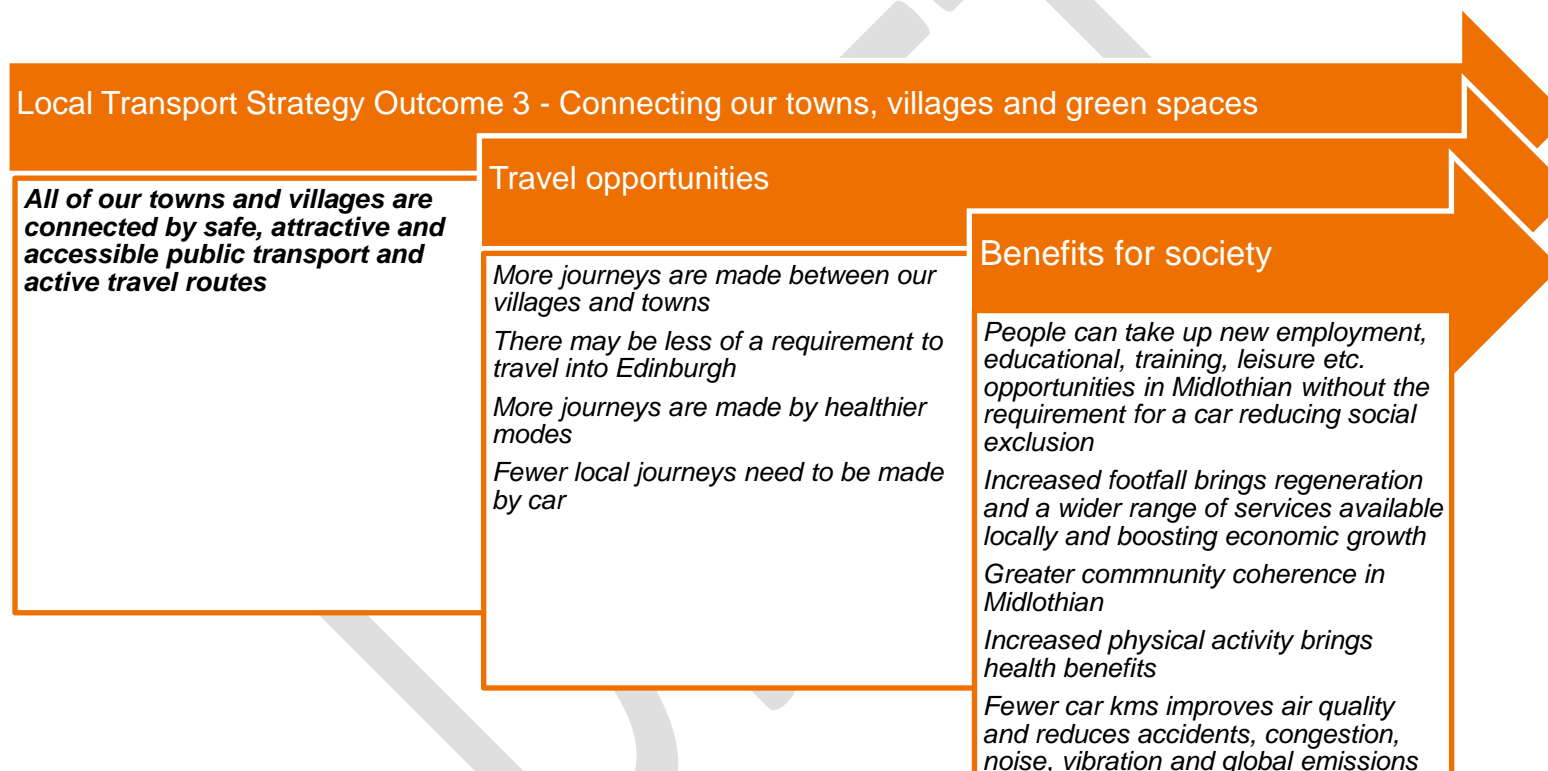
- 8.2.2 We need to make our towns more attractive places, enabling people to make healthier and more sustainable travel choices, and encouraging more people to spend time and money in our High Streets. Population growth in the area provides an opportunity to grow the retail and leisure 'offer' in our towns and promote more local employment opportunities, all reducing 'leakage' to Edinburgh and growing the local economy.





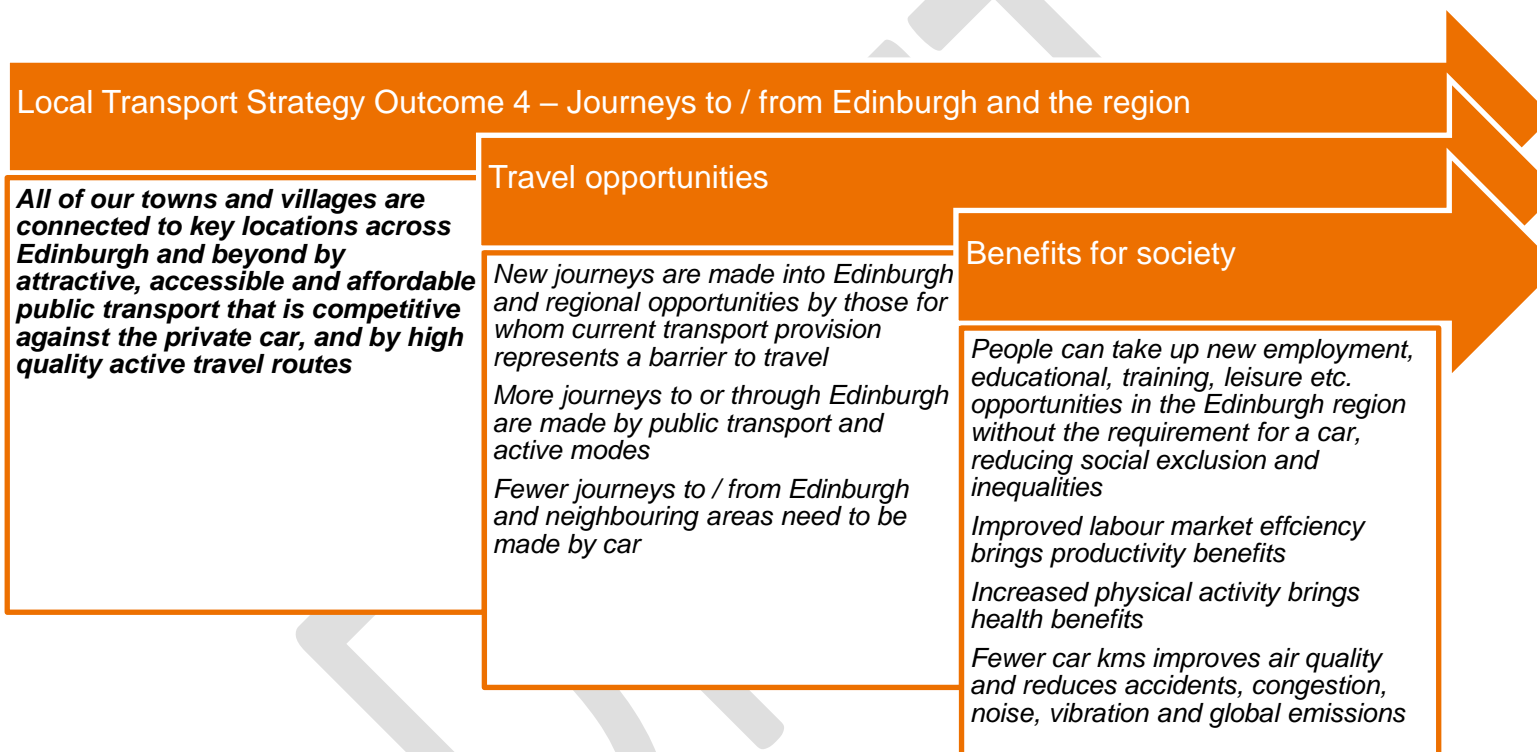
## Local Transport Strategy Draft Outcome 3 – Connecting our towns, villages and green spaces

- 8.2.3 Midlothian is a compact area, and our centres of population are in relatively close proximity. However public transport services between some of our localities are poor and opportunities for safe walking / cycling are limited. Bus services tend to be focussed on north-south travel with poorer east-west connections and this limits opportunities for those without access to a car. Improving connections between our localities for active and public transport will provide new opportunities for those without access to a car and provide alternatives for those who would rather not use a car.



## Local Transport Strategy Draft Outcome 4 – Journeys to / from Edinburgh and the region

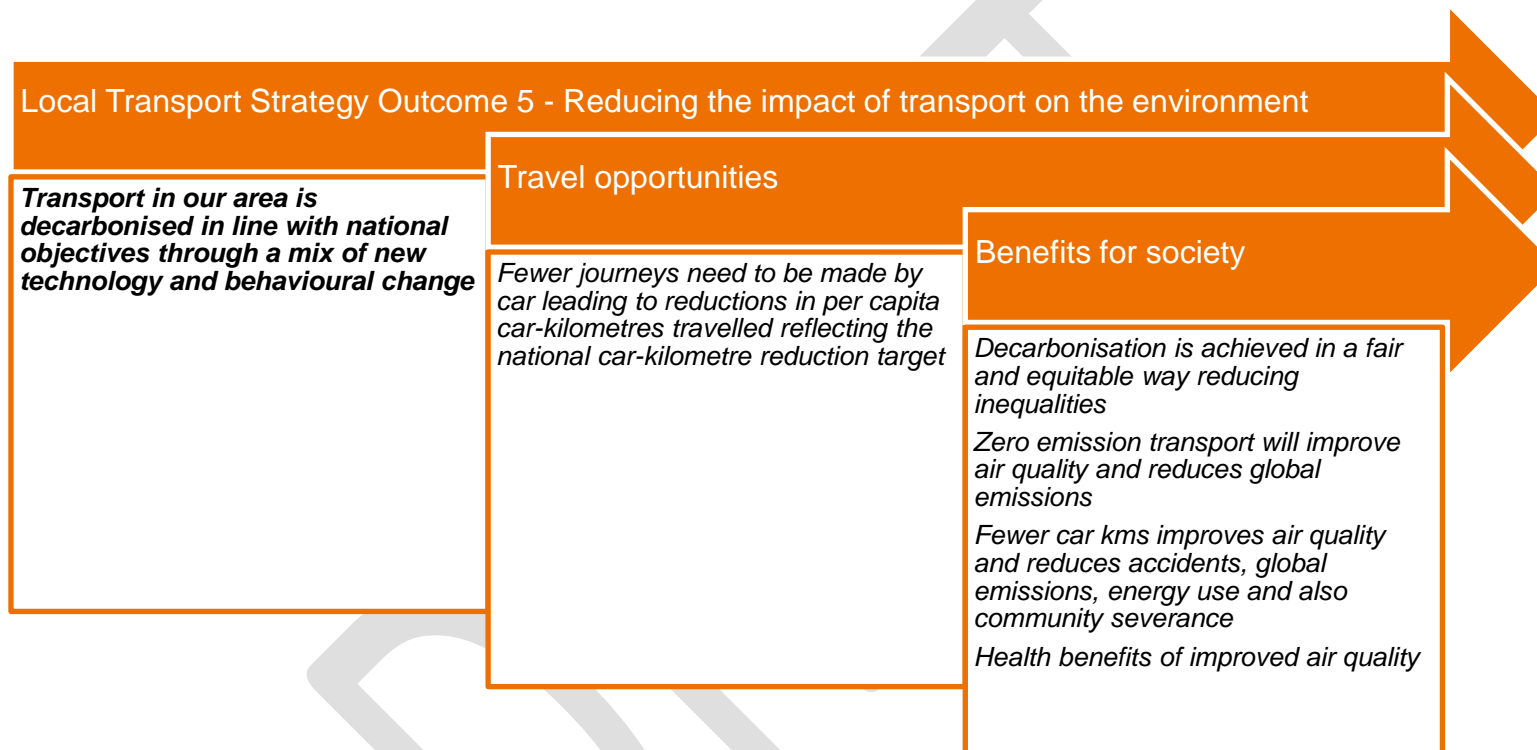
- 8.2.4 Midlothian's location in the region inevitably means that many residents travel frequently to locations across Edinburgh, and beyond, for work, education and training, healthcare, business and leisure. Travel time by bus tends to be long and some localities are less well served by public transport, so many of these trips are made by car. Overall, those most poorly served by public transport, and those without access to a car are less able to access opportunities away from the main bus corridors into Edinburgh.





## Local Transport Strategy Draft Outcome 5 – Reducing the impact of transport on the environment

- 8.2.5** Transport is still a major contributor to carbon emissions. In addition, roads and road traffic can have a negative impact on our communities in terms of noise, air quality, vibration and community severance. Reducing traffic volumes would therefore bring a range of benefits.



## 8.3 Summary

8.3.1 In summary, the five draft LTS outcomes are:

- **LTS Outcome 1:** Our new developments are well planned and deliver transport infrastructure at early stage, supporting high-quality local and cross-boundary active travel and public transport connections.
- **LTS Outcome 2:** Our towns have more space allocated to travel by sustainable modes and to the public realm, reducing the need to make journeys by car.
- **LTS Outcome 3:** All of our towns and villages are connected by safe, attractive and accessible public transport and active travel routes.
- **LTS Outcome 4:** All of our towns and villages are connected to key locations in Edinburgh and beyond by attractive, accessible and affordable public transport that is competitive against the private car, and by high quality active travel routes.
- **LTS Outcome 5:** Transport in our area is decarbonised in line with national objectives through a mix of new technology and behavioural change.

8.3.2 The table below shows how the proposed LTS Outcomes link to the four NTS2 Priorities and the five RTS Strategy Objectives.

Table 8-1: Relationship between LTS Outcomes and NTS2 Priorities / RTS Strategy Objectives.

	LTS Outcome 1: Our new developments are well planned and deliver transport infrastructure at early stage, supporting high-quality local and cross-boundary active travel and public transport connections	LTS Outcome 2: Our towns have more space allocated to travel by sustainable modes and to the public realm, reducing the need to make journeys by car	LTS Outcome 3: All of our towns and villages are connected by safe, attractive and accessible public transport and active travel routes	LTS Outcome 4: All of our towns and villages are connected to key locations across Edinburgh and beyond by attractive, accessible and affordable public transport that is competitive against the private car, and by high quality active travel routes	LTS Outcome 5: Transport in our area is decarbonised in line with national objectives through a mix of new technology and behavioural change
<b>National Transport Strategy 2 Priorities:</b>					
Reduces inequalities	✓	✓	✓	✓	✓
Tackles climate change	✓	✓	✓	✓	✓
Helps deliver inclusive economic growth	✓	✓	✓	✓	✓
Improves our health and wellbeing	✓	✓	✓	✓	✓
<b>SEStran Regional Transport Strategy Objectives:</b>					
Transitioning to a sustainable, post-carbon transport system					✓
Facilitating healthier travel options	✓	✓	✓	✓	
Widening public transport connectivity and access across the region	✓		✓	✓	



	LTS Outcome 1: Our new developments are well planned and deliver transport infrastructure at early stage, supporting high-quality local and cross-boundary active travel and public transport connections	LTS Outcome 2: Our towns have more space allocated to travel by sustainable modes and to the public realm, reducing the need to make journeys by car	LTS Outcome 3: All of our towns and villages are connected by safe, attractive and accessible public transport and active travel routes	LTS Outcome 4: All of our towns and villages are connected to key locations across Edinburgh and beyond by attractive, accessible and affordable public transport that is competitive against the private car, and by high quality active travel routes	LTS Outcome 5: Transport in our area is decarbonised in line with national objectives through a mix of new technology and behavioural change
Supporting safe, sustainable and efficient movement of people and freight across the region	✓	✓	✓	✓	

## 9 Next Steps

### 9.1 Overview

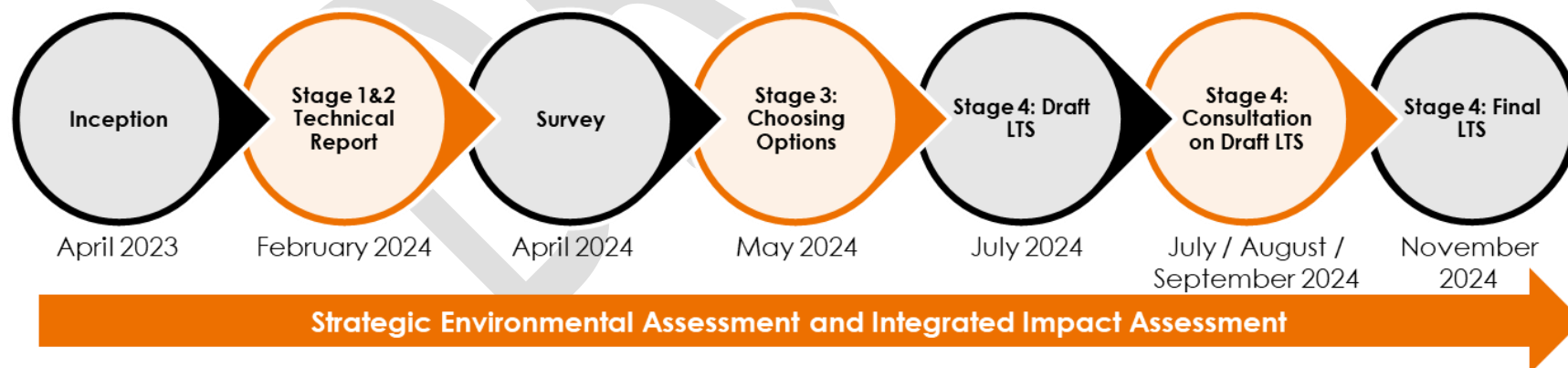
9.1.1 This Stage 1&2 Technical Report has set out the detailed technical analysis which underpins Stages 1 and 2 of the LTS development process and summarised the emerging outputs from this work.

9.1.2 The document has been produced in line with Transport Scotland's LTSDG and the principles of the refreshed STAG and includes a:

- detailed **review of national, regional, and local policy and the associated policy implications for the development of the LTS**
- detailed **baseline of current transport provision and transport demand in Midlothian** by transport mode
- **structured approach to the identification of transport problems**, as well as their supply side cause and travel behaviour and societal consequences

- set of **transport problems** by mode along with their supply side cause
- set of **Draft Strategy Outcomes** and the main resulting changes in travel behaviour and societal impacts associated with these.

9.1.3 As shown in Figure xx, the next stage of work involves an online public survey which aims to ensure the full range of problems (and any opportunities) relating to transport in Midlothian are captured and gather any thoughts on the emerging Strategy Outcomes. The findings from this engagement will then be used to inform Stage 3 (choosing options) and Stage 4 (the preparation of the LTS document).



## Appendix A Wider Policy Documents

DRAFT

## Appendix B Stakeholder Engagement

### B.1 Overview

B.1.1 This appendix provides a summary of the stakeholder engagement undertaken to inform the evidence review. In line with STAG, the engagement focused on gathering information on the current and future transport problems within the localities of Midlothian. Discussions covered active travel, public transport, and other road-based transport; including suggestions on how identified problems could be alleviated.

B.1.2 The engagement involved a series of stakeholder workshops as well as a one-to-one meeting with Lothian Buses. Further information on each of these is provided below.

### B.2 Stakeholder workshops

B.2.1 Three stakeholder workshops were held as follows:

- Midlothian Council Workshop – 6<sup>th</sup> November 2023
- External Stakeholder Workshop – 22<sup>nd</sup> and 27<sup>th</sup> November 2023

B.2.2 Each workshop was held remotely via Microsoft Teams. The workshops included a brief presentation on the aims and objectives of the study before an open discussion covering transport problems and opportunities in Midlothian. To help structure the discussion, the local authority area was divided into the following six separate areas with dedicated time allocated to each of these:

- Penicuik / Loanhead / Bilston / Roslin

- Bonnyrigg / Rosewell

- Dalkeith / Newbattle

- Mayfield / Gorebridge

- Danderhall / Shawfair

- Pathhead and other rural locations outside of the above settlements

B.2.3 An online Mural page was set which was open to stakeholders before, during, and after the workshop, allowing them to leave comments on maps of the six areas. The Mural page remained open for one week after the meeting for any further comments and reflections. A project email address was also set up and stakeholders could also provide comments directly via this means.

### Findings

B.2.4 The following sections provide a summary of the points raised in the workshops and recorded via the Mural page and / or sent via email to the project email address.

### Penicuik / Loanhead / Bilston / Roslin

#### Planned and committed schemes

- The A701 Bypass / Relief Road is a committed scheme and plans are progressing, with delivery anticipated to be 2028. The scheme aims to reduce congestion on the A701. The new route alignment bypasses the landfill site.
- Large development at Auchendinny and Beeslack High School which will have a larger catchment area is being relocated to the A703. Safe routes to school will need to be provided.

- New high school being delivered at Bilston with associated improvements in active travel connections to the site.
- University of Edinburgh is planning to expand Easter Bush campus and the wider 'triangle' site
- Redevelopment of Hillend's Sport centre with development of a new junction (still in the design process, Transport Scotland) which will allow buses to serve the sports centre and will accommodate cycle lanes.

### Existing Problems

#### Active travel

- Edinburgh to Easter Bush is a very significant active travel route but there is currently no cycling infrastructure, and the footways are narrow.
- Cycle provision is lacking or poor connecting Penicuik to Bilston, the Bush and onward to Edinburgh. While there are on road cycle lanes from Penicuik to Straiton, the roads are busy.
- Topography (steep gradients) is a barrier, particularly between Roslin, Rosewell, and Loanhead.
- Regarding off-road cycling infrastructure, there are several well-used off-road routes, including NCN 196. However, links to railway stations are limited. The Roslin to Shawfair route is lit, but part of the Penicuik to Dalkeith route is not.
- Links to the Roslin to Shawfair route could be improved.
- The footways on roads linking Roslin to the A701 are narrow and the speed limit is relatively high (40mph on the B7006).

- The Shawfair to Roslin path is good for leisure, but not great for commuting.
- Several Mural comments suggested designated cycle routes, including from Bush to Fairmilehead, Penicuik to Edinburgh via Loanhead/Straiton, and Gowkley Moss to Straiton, as well as an increase to public transport provision.

#### Public transport

- There are few east-west links across the local authority area
- Connectivity by non-car modes to the Pentlands is poor.
- The bus route from Dumfries to Penicuik and onward to Hillend (Houstons Coaches services 101 / 101A / 102) is infrequent, runs late and is unreliable.
- Residents in Roslin have difficulties accessing buses to / from Penicuik and the Borders because they must go to the main corridors (A701 or A702).
- Bus service 15 from Damhead no longer stops in Penicuik despite Penicuik being the local high school for Damhead.
- There is a lack of buses for students accessing Bush junction, which affects the community's accessibility.

#### Other road-based transport

- A702 / A703 junction at Hillend is problematic with poor sightlines and resultant delays and collisions. Topography at the junction makes improvements challenging. Potential to signalise the junction.
- Bush Loan / A702 junction used as an alternative resulting in delays at this junction also. Providing two lanes of traffic and

realigning the right hand turn to Edinburgh coming from Bush Loan may improve traffic flow at the junction.

- The A701 / Niven's Knowe Road junction (towards Loanhead), causes delays because of right-turning vehicles, resulting in traffic congestion up to the Bilston roundabout.
- Traffic congestion on the A701 in general - a Park and Ride south of Penicuik to allow people to park and then take the bus to Edinburgh would be beneficial.
- Edinburgh City Bypass causes severance and delays.

### Bonnyrigg / Rosewell

#### Planned and committed schemes

- There is a major development planned to the south side of Bonnyrigg which involves a large expansion of 200 houses.

#### Existing problems

##### Active travel

- Bonnyrigg and Rosewell are largely residential and the current speed limit is an issue for active travel users. There is a proposal to introduce 20mph speed limits for current 30mph roads.

##### Public transport

- In May 2023, Lothian Buses withdrew Service 49 which provided a direct connection from Rosewell to Edinburgh, with residents of Rosewell now having to travel via Service 46 to the Royal Infirmary and interchange there for onward connections to Edinburgh.

- Bus connections from Bonnyrigg to Edinburgh / Edinburgh Royal Infirmary are unreliable and have long journey times, with no bus priority and a lack of integration between buses causing long wait times.

### Dalkeith / Newbattle

#### Planned and committed schemes

- New primary school is being provided in Easthouses, Dalkeith and associated improvements in active travel connections to the site
- Bus priority (signalisation) is being provided in Dalkeith
- Midlothian Council has secured funding from Sustrans to improve active travel connections between Sheriffhall Roundabout and Newtongrange. The scheme is at an early stage but will likely involve separate plans for pedestrians and cyclists.
- A7 Urbanisation Scheme being progressed by Midlothian Council along the A7 between Gilmerton Road Roundabout and Dalhousie Road, Newtongrange.

#### Existing problems

##### Active travel

- Sheriffhall Roundabout is a barrier to active travel
- Penicuik to Dalkeith walkway (riverside) is well used but cyclists complain about the surface of the route.
- Lack of accessibility and safety at Eskbank Toll roundabout – barrier for active travel.

- Roads in Dalkeith are very busy and unappealing for family cycling. Eskbank Toll is challenging for active travel.
- Unpleasant and insecure environment when accessing Eskbank rail station, with narrow pathways, high fencing walls.

#### Public transport

- Dalkeith is the most important hub in terms of bus services, but there is a lot of traffic resulting in delays.
- The live information boards in Dalkeith need to be replaced. Lothian Buses is aware of the issues in the area. Around 45 need to be replaced but there is a need to secure funding.
- There is a lack of public transport in the Easter Langside development.
- There is no bus stop outside Dalkeith Country Park
- There are no bus stops on the A7 (it is understood the provision of bus stops will be considered as part of the A7 Urbanisation scheme).

#### Other road-based transport

- Congestion at Sheriffhall Roundabout resulting in delays
- Lack of parking in Dalkeith town centre

### **Mayfield / Gorebridge**

#### **Planned and committed schemes**

- There is a proposal for two large-scale developments in the south side of Mayfield / Industrial Estate although these are in a very early stage of development

#### **Existing problems**

##### Active travel

- The school that serves Gorebridge is based in Mayfield but there is no safe walking and cycling route between the areas.

##### Public transport

- Beneficial to have a connection from Gorebridge Railway Station to Vogrie Country Park.

### **Danderhall / Shawfair**

#### **Planned and committed schemes**

- A crematorium is due to be built in Old Craighall
- Old Craighall Road is closed because of a new development. The link will be closed for about 2 months. Active travel provision on the link will be improved prior to it re-opening.

#### **Existing problems**

##### Active travel

- Edinburgh City Bypass causes severance issues; it would be beneficial to have a connection avoiding the Sheriffhall roundabout e.g., Dalkeith Country Park to Shawfair.
- Lack of footways around schools in Shawfair

##### Public transport

- Lack of public transport connections between Shawfair and Edinburgh



- East-west connection desirable to help link Musselburgh and Queen Margaret University to Little France and Fort Kinnaird.

#### Other road-based transport

- Rat-running on the Whitehill Road and Cauldcoats Road (from Fort Kinnaird) during busy periods (e.g. Christmas)

### **Pathhead and other rural locations outside of the above settlements**

#### **Planned and committed schemes**

- Plans for 20mph limits and narrowing of roads as part of 20mph proposals

#### **Existing problems**

##### Active travel

- Footways in rural areas are not well maintained. A number of specific comments were made on this within the Mural including flooding on the road connecting Gorebridge to Vogrie Country Park;
- Lack of active travel connections were noted within Mural, including between Vogrie Country Park and the A68, Pathhead and Dalkeith, and Edgehead and Whitehill, contributing to high car use– it is noted that a survey of users of Vogrie Country Park was undertaken in July 2022 and this demonstrated that 91% of the 138 people surveyed had travelled to the site by car.
- Local road network used by larger vehicles when there are delays on the A68 which makes active travel unappealing
- Feedback from the ATS engagement suggested that high speeds on rural roads are a significant barrier to active travel,

especially on winding roads, for example Gorebridge to Temple, and to Gladhouse. Reduced road speeds may encourage more active travel.

##### Public transport

- Pathhead has only one bus service. Midlothian Council is exploring transporting school children by public bus to increase demand and encourage bus companies to provide a service.
- Borders Buses bus timetables are not suitable for Midlothian residents, with the service not starting early enough and finishing too early – this impacts all users, restricting connectivity to employment, education and leisure opportunities. This is particularly the case without access to a car who are therefore dependent on public transport, including older and younger people, those with disabilities who are unable to drive, and those on lower incomes.
- Pathhead has a much larger fare cost per mile compared to other locations.
- Lack of east-west public transport connections.

##### Other road-based transport

- Issues regarding the competing demands of a national trunk road and the needs and demands of local traffic.
- Lack of suitable alternative routes. When there are delays on the A68, diverted traffic causes problems on the local road network which is not designed for larger vehicles.
- Lack of EV charging points in rural areas and problems with provision of EV charging points in areas where off-road parking is limited.

- Several junctions were isolated on the Mural page and regarded as unsafe, including the A6093 / A68 junction, a five-way junction between Pathead and Ford, and the Roman Camp and Main Street junction.

### B.3 Overview

B.3.1 The tables below provide a summary of the wider national, regional, and local policy documents reviewed to inform the development of this Case for Change Report.

Table B-1: Wider national policy documents reviewed

Policy	Description
<b>A Route Map to Achieve a 20 per cent Reduction in Car Kilometres by 2030 (2022)</b>	This document sets out a route map of how Scotland will achieve a 20% reduction in car kilometres by 2030. The documents presents a framework of sustainable travel behaviours (namely: reducing the need to travel; living well locally; switching modes to walk, wheel, cycle or public transport where feasible; and combining trips or sharing journeys) and sets out a series of actions which will be taken forward to support each of these. The latter includes extending superfast broadband; improving town centres; increasing investment in active travel; introducing low emission zones (LEZ); investing in the public transport network; and testing Mobility as a Service (MaaS).
<b>A Fairer, Greener Scotland: Programme for Government 2022 - 23</b>	<p>The Scottish Government's Programme for Scotland sets out the Government's ambitions for each fiscal year. The document provides strategies and policies across all departments of Government, including transport. Within this document, there is a focus on Scotland's transition to a Net Zero Nation in a fair and just way. There are six policy interventions that will shape the development of the LTS, namely:</p> <ul style="list-style-type: none"> <li>Removing the majority of diesel buses from public transport by the end of 2023</li> <li>Reducing car kilometres by 20% by 2030</li> <li>Decarbonising Scotland's railways by 2035</li> </ul>

Policy	Description
	<ul style="list-style-type: none"> <li>Phasing out the sale of new petrol and diesel cars by 2030</li> <li>Nationwide free bus travel for young people under the age of 22</li> <li>Spending at least £320 million or 10% of the total transport budget on active travel (beginning in 2024-2025)</li> </ul> <p>The vision for increased spending on active travel and free bus travel for under 22s will promote these modes of transport, while reducing private vehicle usage. The introduction of new rail traction and buses also has the potential to decrease travel times and decarbonise the transport network (depending on the technology used).</p>
<b>Scotland's Road Safety Framework to 2030</b>	Sets out a Vision and Outcomes for Scotland to have the best road safety performance in the world by 2030 and a long term goal where no one is seriously injured or killed on our roads by 2050.
<b>Just Transition Commission: A National Mission for a fairer, greener Scotland (2021)</b>	<p>Includes 24 headline recommendations including:</p> <ul style="list-style-type: none"> <li>Scottish Government, Local Authorities and Developers must commit to creating communities that embed low-carbon lifestyles, while improving our health and wellbeing</li> <li>Ensure sufficiently developed roadmaps exist for the net zero transition in Scotland, including for key technology options</li> <li>Implement Green Participatory Budgeting with agreed target levels of funding</li> </ul>
<b>Active Travel Framework</b>	The Active Travel Framework brings together the key policy approaches to improving the uptake of walking and cycling in Scotland for travel.
<b>Scotland's Accessible Travel Framework (2016)</b>	<p>Vision: All disabled people can travel with the same freedom, choice, dignity and opportunity as other citizens.</p> <ul style="list-style-type: none"> <li><b>Outcome 1:</b> more disabled people make successful door-to-door journeys, more often</li> </ul>

Policy	Description
	<ul style="list-style-type: none"> <li>• <b>Outcome 2:</b> disabled people are more involved in the design, development and improvement of transport policies, services and infrastructure.</li> <li>• <b>Outcome 3:</b> everyone involved in delivering transport information, services and infrastructure will help to enable disabled people to travel.</li> <li>• <b>Outcome 4:</b> disabled people feel comfortable and safe using public transport – this includes being free from hate crime, bullying and harassment when travelling</li> </ul>
<b>A Network fit for the Future: Draft Vision for Scotland's Public Electric Vehicle Charging Network</b>	<p>Transport Scotland published a draft vision for Scotland's public electric vehicle (EV) charging network in late January 2022. The plan aims to encourage the uptake of zero emission vehicles through increasing the number of publicly available EV chargers.</p> <p>The strategy includes a Vision and four main objectives as follows:</p> <ul style="list-style-type: none"> <li>• <b>A People Focused Network</b> – ensuring that people have access to a well-designed and comprehensive charging network which works for everyone, regardless of age, health, income or other needs.</li> <li>• <b>Accelerating Commercial Investment</b> – enabling new models of public electric ChargePoint funding to allow for private investment; and ensuring public funds are targeted at areas where commercial investment is unable to fully deliver.</li> <li>• <b>Coordinating With the Electricity Network</b> - Creating a new partnership with the energy network to allow for new electricity storage opportunities, end-to-end net zero energy generation, and ensuring optimal capacity on Scotland's power grid</li> <li>• <b>Integration with Scotland's Sustainable Transport System</b> - Locating EV charge points where they can promote active and public transport usage inline with the 20% reduction in car KM and sustainable transport hierarchy</li> </ul> <p>Funding has been made available for each Local Authority to produce its own public EV Infrastructure Strategy. Midlothian Council has produced a draft of this document. This is discussed further below</p>

Policy	Description
<b>Transport (Scotland) Act 2019</b>	<p>The Transport (Scotland) Act 2019 is an important legal framework that was designed to help make Scotland's transport network cleaner and more accessible. The law grants new powers to local authorities in the areas of bus provision, parking, low emission zones, road works, and smart ticketing. A summary of new powers available to local authorities is provided below:</p> <p><b>Bus Services:</b></p> <ul style="list-style-type: none"> <li>• Allowance of Bus Service Improvement Partnerships (BSIPs)</li> <li>• New local franchising powers</li> <li>• New/extended powers for local transport authorities to provide bus services to meet social needs</li> <li>• Powers to require bus operators to make more information available to the public on services, including routes, timetables and fares</li> <li>• Powers to require operators withdrawing services to provide more information to local transport authorities</li> </ul> <p><b>Smart Ticketing:</b></p> <ul style="list-style-type: none"> <li>• Extending existing ticketing arrangements and schemes to include connecting services</li> <li>• Giving Scottish Ministers the power to set a national technological standard for smart ticketing</li> <li>• Creating a National Smart Ticketing Advisory Board</li> <li>• Providing a guide for a consistent approach for smart ticketing arrangements and schemes, and clearer processes for implementation</li> <li>• The requirement for local transport authorities to produce annual reports on ticketing arrangements and schemes to evaluate and adapt for best practices</li> <li>• Scottish Ministers have new powers to direct a local transport authority to make or adjust a ticketing scheme</li> </ul> <p><b>Low Emission Zones (LEZs):</b></p> <ul style="list-style-type: none"> <li>• Local authorities are able to create, enforce, operate or revoke a low emissions zone in their area, and are able to design the shape, size and vehicle scope of the LEZ</li> </ul> <p>The ability for local authorities to promote permanent and/or time-limited exemptions from the requirements of</p>



Policy	Description
	<p>a low emission zone, in line with Scottish Minister regulations</p> <ul style="list-style-type: none"><li>Local authorities are required to ring-fence the funds received from penalties to facilitate the achievement of LEZ scheme objectives</li></ul> <p><b>Workplace Parking Licensing:</b></p> <ul style="list-style-type: none"><li>Local authorities are able to implement workplace parking licensing locally, and shape proposals to suit local circumstances</li><li>Local authorities may use revenues from the workplace parking levy to support the policies in their Local Transport Strategy</li></ul>

Table B-2: Wider regional policy documents reviewed

Policy	Description
<b>SEStran Park and Ride Strategic Study (June 2020)</b>	<p>An update to the existing SEStran Park and Ride Strategy (2009) was published in 2020. The study acts as an evidence base and will inform future investment priorities for enhancement of Park and Ride facilities. The study identifies the following interventions for further consideration to provide a more sustainable transport network in the SEStran region:</p> <ul style="list-style-type: none"><li>Support active travel to Park and Ride facilities – developing joined up routes that are safe and secure for all users</li><li>Orbital Park and Ride investment – constructing new Park and Ride sites to encourage Park and Ride usage</li><li>Improve connectivity within Edinburgh – facilitating more ‘cross-city’ journeys via public transport to encourage public transport usage</li><li>Peripheral Park and Ride facilities – building new Park and Ride sites at locations near to strategic roads and transport links to encourage modal shift on journeys into Edinburgh</li><li>Park and Ride Digital twin – developing live utilisation and turn over capture mechanism to provide information to users, local authorities and SEStran</li><li>Public transport as a service – Integrating MaaS at Park and Ride locations</li></ul>

Policy	Description
<b>SEStran Strategic Network – Cross Boundary Active Travel Routes, Connecting People and Place (May 2020)</b>	<p>The SEStran Strategic Network provides a framework for the coordinated development of cross boundary active travel routes. The Network builds on the 2015 SEStran Strategic Cross Boundary Cycle Development study. The study included a review of the network, identification of problems and the option development. Problems included:</p> <ul style="list-style-type: none"><li>Many existing junctions on strategic network corridors are difficult to negotiate acting as significant barriers for active travel</li><li>Awareness of some routes is low, particularly those that are off-road</li></ul> <p>The route options identified for progression in Midlothian include:</p> <ul style="list-style-type: none"><li>S1 – Little France to Eskbank Station</li><li>S2 – Dalkeith to Bonnyrigg</li><li>S3 – Danderhall to Straiton</li><li>S4 – Straiton to Cameron Toll</li><li>S5 – Straiton to Penicuik</li><li>S6 – Bilston to Easter Bush</li></ul>
<b>City Region Deal Workforce Mobility Project</b>	<p>This project aims to work across sectors to improve communication, and the effectiveness of local transport to support access to employment, training and education. The first phase of the Workforce Mobility Project, to be complete in March 2024, is focused on working with partners to improve bus services through the use of demand data from the existing commuting workforce (not currently using public transport). This data will be collected and analysed to provide the opportunity to optimise the public transport network, and cater for a new demand that supports a viable alternative to the private car</p>

Table B-3: Wider local policy documents reviewed

Policy	Description
<b>Midlothian Parking Strategy</b>	<p>The Midlothian Parking Strategy was developed in 2017 to supplement the Midlothian Local Transport Strategy and to assist the Council's application to assume powers in relation to decriminalised parking enforcement (DPE). The strategy set out</p>





Policy	Description
	<p>a series of problems with respect to parking in Midlothian at that time along with a set of objectives and policies to be delivered to help resolve these issues. While somewhat out of date, key issues identified included:</p> <ul style="list-style-type: none"><li>• Overspill parking – parking on surrounding streets around schools, rail stations and retail parks</li><li>• Lack of enforcement of restrictions – leading to illegal parking and low turnover of spaces – as above DPE was introduced following the delivery of the strategy and therefore this issue is likely to be somewhat resolved</li><li>• Balance of parking supply – lack of balance between short, medium and long stay parking, with long-stay parking in inappropriate locations – the latter included use of town centres as informal park and rides with commuters travelling into Edinburgh parking in town centres and travelling by bus into the city, resulting a lack parking for those wishing to use local shops.</li><li>• General issues with parking and loading – including lack of disabled parking, lack of residential parking management, poor signage / lack of awareness, and loading issues.</li></ul> <p>The objectives were as follows:</p> <ul style="list-style-type: none"><li>• To provide balanced and appropriate parking facilities that support the economic, environmental and accessibility requirements of Midlothian's towns</li><li>• To maximise the efficient use of parking provision</li><li>• To provide a stimulus for economic activity</li><li>• To assist with controlling air pollution</li></ul> <p>In total, 25 parking policies were outlined. These covered a wide spectrum of topics, including introducing decriminalised parking enforcement (DPE), improved parking management, more park and ride provision, and the delivery of cycle parking at key locations. Following the development of Strategy Midlothian Council introduced DPE in April 2018.</p>

Policy	Description
<b>Dalkeith Town Regeneration</b>	Midlothian Council is currently updating the regeneration masterplan for Dalkeith. An initial set of proposals for the town were developed and consulted upon between 25 August and 4 September 2022. Comments received indicated that there was support for pedestrianising some of the town centre, so that people can feel safe walking, wheeling and cycling. The consultation also indicated that there was support for providing new, safe transport connections between local places and the town centre, especially Eskbank station, with some suggesting cycle routes and improved accessibility for pedestrians and wheelchair users. Following the consultation, work is now underway on an updated Draft of the Masterplan.
<b>Electric Vehicle Infrastructure Strategy</b>	In common with other local authorities in Scotland, Midlothian Council is currently producing a public EV Charging Strategy using funding from the Electric Vehicle Infrastructure Fund (EVIF). The Plan will set out how public EVCI in Midlothian will be expanded up to 2026 and will be completed by the end of March 2024. The plan will be reviewed by the EVIF Programme Board who will make recommendations to Transport Scotland as to the level of EVIF capital funding to be allocated to Midlothian Council over the period up to 2026.
<b>Midlothian Speed Policy / Speed Limit Review</b>	Following the completion of the Roads Hierarchy Review in early 2022, Midlothian Council produced an updated Speed Policy and, in April 2023, completed a Speed Limit Review. The latter considered speed limits across the Council area with a view to adjusting speed limits to 20mph in appropriate locations. This review identified 850 streets where it was recommended that the speed limit should be changed from 30mph to 20mph and just 70 streets where it was recommended that the current 30mph speed limit be retained. The Speed Limit Review was subsequently approved by Councillors in May 2023 and the statutory process to introduce the new speed limits and associated traffic calming measures is now underway.

Policy	Description
<b>Gorebridge Community Action Plan 2015-2020</b>	<p>A plan was published in 2015 and it is understood an update to this plan is currently being developed. The 2015 plan includes a vision for Gorebridge which includes the ambition that:</p> <p><i>“Gorebridge will be accessible to all, with good transport links for rail, road, pedestrians and cyclists. There will be an excellent network of local paths for walkers and cyclists, giving access to our beautiful countryside”. The plan includes a number of priorities. Those with specific relevance to transport include: continuing to lobby for improved bus services, identify additional parking areas in Gorebridge, and develop a tourism/economic strategy to make the most of the opportunities presented by rail.</i></p>

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## Appendix C Midlothian Bus Services

### C.1 Overview

C.1.1 The table below provides a summary of the bus routes which serve Midlothian as of August 2023. For ease of reference, the services have been grouped into the following categories based on the areas they connect:

- Midlothian and Edinburgh City Centre
- Scottish Borders and Midlothian (and onward to Edinburgh City Centre)
- Dumfries and Galloway / South Lanarkshire and Midlothian (and onward to Edinburgh City Centre)
- Midlothian and East Lothian
- Local services largely internal to Midlothian

C.1.2 For each service, information is included on the operator, service number, route, Midlothian settlements served and weekday frequency.



Table C-1: Summary of Midlothian bus services

	Operator	Service number	Route	Settlements served	Weekday Frequency
Midlothian and Edinburgh City Centre	Lothian Buses	3	Mayfield (Midlothian) - Clovenstone (West Edinburgh) via Edinburgh City Centre	Mayfield, Easthouses, Dalkeith, Eskbank	Every 12 mins
		15	Easter Bush, Midlothian - Waterloo Place (Edinburgh City Centre)	Bilston	Hourly
		29	Gorebridge (Midlothian) - Silverknowes (north Edinburgh) via Edinburgh City Centre	Gorebridge, Newbattle, Newtongrange	Every 20 mins
		X29	Gorebridge (Midlothian) -Waterfront Gait (north Edinburgh) via Edinburgh City Centre	Gorebridge, Newbattle, Newtongrange	Peak Express service (two in the morning to Edinburgh and two return services in the evening)
		31	Bonnyrigg / Polton Mill (Midlothian) - East Craigs (west Edinburgh) via Edinburgh City Centre (Usher Hall) and Gyle Shopping Centre	Polton, Bonnyrigg, Lasswade	Every 30 minutes to / from each of the branch lines (Bonnyrigg and Polton Mill) and therefore every 15 minutes on the core line
		X31	Rosewell – Edinburgh (West Maitland Street)	Rosewell, Bonnyrigg	Peak Express service (3 morning to Edinburgh and 3 evening return)
		33	Wester Hailes – Millerhill via Edinburgh City Centre and Sheriffhall P&R	Danderhall, Sheriffhall P&R, Millerhill	2-3 per hour
		37	Penicuik / Loanhead (Midlothian) – Silverknowes (north Edinburgh) via Edinburgh City Centre	Loanhead, Roslin, Penicuik	Every 30 mins to/from Penicuik and every 15 from Loanhead
		X37	Penicuik / Loanhead (Midlothian) – Granton (north Edinburgh) via Straiton P&R and Edinburgh City Centre	Straiton P&R, Loanhead, Roslin, Penicuik	Peak Express service (3 morning to Edinburgh and 3 evening return)

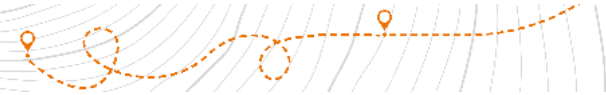
	Operator	Service number	Route	Settlements served	Weekday Frequency
		47 <sup>41</sup>	Penicuik (Midlothian) – Cammo (northwest Edinburgh) via Straiton P&R and Edinburgh City Centre	Penicuik, Bilston, Straiton, Straiton P&R	Every 20 mins
		47B	Penicuik (Midlothian) – Cammo (northwest Edinburgh) via Easter Bush Straiton P&R and Edinburgh City Centre	Penicuik, Easter Bush, Bilston, Straiton, Straiton P&R	Peak time service – nine AM peak services to Easter Bush and six PM peak services to Cammo
		N3	Haymarket – Gorebridge (Midlothian) via Edinburgh City Centre	Dalkeith, Mayfield, Newtongrange, Gorebridge	Hourly
		N31	Edinburgh City Centre - Bonnyrigg	Bonnyrigg	2 departures
		N37	Silverknowes (northwest Edinburgh) – Penicuik	Loanhead, Bilston, Roslin, Penicuik	Hourly
Scottish Borders and Midlothian (and onward to Edinburgh City Centre)	Borders Buses	51 / 52	St Boswells (Scottish Borders) to Edinburgh City Centre (Edinburgh Bus Station)	Fala, Pathhead, Edgehead, Dalkeith, Danderhall	Every 1.5 hours
		X62 (bike bus)	Galashiels to Edinburgh City Centre (Edinburgh Bus Station)	Penicuik	Every 30 mins
		X95 (bike bus)	Carlisle to Edinburgh City Centre (Edinburgh Bus Station)	Middleton, Newtongrange, Eskbank, Danderhall	Every hour

<sup>41</sup> This service was revised on 28<sup>th</sup> May 2023, with services now terminating at Cammo instead of Granton

	Operator	Service number	Route	Settlements served	Weekday Frequency
Dumfries and Galloway / South Lanarkshire and Midlothian (and onward to Edinburgh City Centre)	Houstons Coaches	101 / 101A / 102	101: Biggar (South Lanarkshire) - Edinburgh City Centre (Edinburgh Bus Station) 101A Dumfries – Edinburgh City Centre (Edinburgh Bus Station) – excluding Penicuik 102: Dumfries – Edinburgh City Centre (Edinburgh Bus Station) – stopping in Penicuik	Penicuik	Hourly from Biggar, with one service every four hours beginning in Dumfries
Midlothian and East Lothian	East Coast Buses	140/141 <sup>42</sup>	Penicuik - Musselburgh	Penicuik, Easterbush (141), Roslin (140), Loanhead, Bonnyrigg, Eskbank, Dalkeith	Each service runs hourly providing 2 buses per hour
	Lothian Buses	46	Rosewell - Musselburgh	Rosewell, Eskbank, Dalkeith, Musselburgh	Every 30 mins
	Lothian Buses	48 <sup>43</sup>	Gorebridge (Midlothian) – Musselburgh via Fort Kinnaird (southeast Edinburgh) and Sheriffhall P&R	Gorebridge, Newtongrange, Mayfield, Easthouses, Dalkeith, Sheriffhall P&R	Every 30 mins
	Prentice of Haddington	111/111A	Haddington (East Lothian) to Royal Infirmary (Edinburgh)	Millerhill, Danderhall	Hourly
Internal Midlothian only	East Coast Buses	139	Midlothian Community Hospital (Bonnyrigg) - Dalkeith	Bilston, Dalkeith	Hourly
	Lothian Community Transport Services	R1	Dalkeith, Bonnyrigg, Carrington, Temple, Gorebridge, Tesco	Dalkeith, Eskbank, Bonnyrigg, Gorebridge,	Two services every Thursday

<sup>42</sup> 141 diverts via Easter Bush

<sup>43</sup> This service was revised on 28<sup>th</sup> May 2023. The service previously terminated at Fort Kinnard via Edinburgh City Centre. The revision saw the service extended to serve Musselburgh and route via Fort Kinnard.



	Operator	Service number	Route	Settlements served	Weekday Frequency
		R2	Dalkeith, Gorebridge, Bonnyrigg, Tesco (Eskbank)	Dalkeith, Bonnyrigg, Gorebridge,	One service every Thursday
		R3	Dalkeith, Danderhall, Newton Village, Millerhill, ASDA (The Jewel)	Dalkeith, Danderhall	One service every Thursday
		R4	Dalkeith, Lasswade, Loanhead, Sainsbury's and ASDA (Straiton)	Dalkeith, Eskbank, Loanhead	One service every Monday
		R5	ASDA (Straiton), Bonnyrigg, Carrington, Temple, Gorebridge	Loanhead, Bonnyrigg, Gorebridge, Lasswade	One service every Monday

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**Pavement, Double and Dropped Kerb Parking Restrictions****Report by Derek Oliver, Chief Officer, Place****1 Recommendations**

- a) Council notes inconsiderate and obstructive parking on pavements, footways, dropped kerbs and double parking causes inconvenience and accessibility issues; and
- b) Approves that pavement, footway, double and dropped kerb parking restrictions, as introduced by The Parking Prohibitions (Enforcement and Accounts) (Scotland) Regulations 2023, be enforced effective from 1<sup>st</sup> April 2024.

**2 Purpose of Report/Executive Summary**

The purpose of this report is to update Council on the introduction of new parking prohibitions for pavement, double and dropped kerb parking. The Parking Prohibitions (Enforcement and Accounts) (Scotland) Regulations 2023 came into force on 11 December 2023.

It is recommended that Council enforce these new Regulations utilising its decriminalised parking powers with effect from 1<sup>st</sup> April 2024, prioritising locations where public safety and accessibility are impacted. There will be a graduated approach, with a short introductory period to allow the public to adjust to the new rules. A targeted, awareness campaign will be launched during this period, where behavioural change will be the focus and compliance with the prohibitions will be encouraged.

**Date:** 8 March 2024  
**Report Contact:** Robbie Beattie Neighbourhood Services Senior Manager  
**Email:** Robbie.Beattie@midlothian.gov.uk

### **3 Background**

- 3.1** The Transport (Scotland) Act 2019 part 6 provided powers for local authorities to prohibit pavement parking, double parking, and dropped kerb parking. These powers became live when the Parking Prohibitions (Enforcement and Accounts) (Scotland) Regulations 2023 came into force on 11 December 2023.
- 3.2** There are two main reasons for introduction of these parking powers a) Damage to infrastructure. Pavements are not normally designed to accommodate vehicles driving or parking on them. This leads to damaged surfaces, higher maintenance costs and increasing the risk of trips and falls and b) Accessibility. The Government's Inclusive Transport Strategy (July 2018) aimed to create a transport system that provides equal access for disabled people by 2030.
- 3.3** Inconsiderate and obstructive parking on footways and at dropped kerbs as well as double parking causes inconvenience and accessibility issues. It particularly affects those with mobility issues, parents with pushchairs and older people. It also causes difficulties for those, such as children, trying to cross a road due to impaired visibility caused by inconsiderate parking. Enforcement of the regulations will improve accessibility for these groups.

### **4 Main Report**

- 4.1** In preparation for the introduction of the regulations 2,097 roads were assessed in May 2023 by the Project Centre. The assessment aimed to provide an understanding of parking behaviour in Midlothian and in particular, the potential impact of the legislation where footway parking currently exists.
- 4.2** A robust set of criteria were used to assess each road. A Red classification was given where there was a significant level of pavement parking currently taking place (pavement parking on >25% road's length). Amber where there were moderate levels of pavement parking currently taking place (pavement parking on between 1% and 25% road's length). Green, where there was negligible pavement parking taking place (pavement parking on <1% road's length).
- 4.3** For those roads where an amber classification was assessed they were further to determine if the resulting unobstructed footway width where footway parking is taking place was less than 1.5metres
- 4.4** Following the assessment 151 roads or 7.2% of the total were classified red requiring further assessment. 162 roads that were private or under development were unclassified.

Midlothian		
Classification	Number	Percent
Red	151	7.2%
Amber	5	0.2%
Green	1779	85%
Unclassified	162	7.7%
	<b>2097</b>	<b>100%</b>

Table 4.4

- 4.5** The 151 roads classified as red were assessed against criteria in table 4.5 to determine the likely impact of enforcement of pavement parking.

Impact Parking Displacement	Assessment
No impact	0% of identified footway parking will be likely to be displaced to nearby roads. Sufficient on-carriageway space on the same road
Minor	<25% of identified footway parking will be likely to be displaced to nearby roads AND 100% of parking displacement can be accommodated on surrounding roads without introducing additional parking pressures (i.e. available parking spaces on nearby roads will likely be reduced by <25%)
Moderate A	<25% of identified footway parking will be likely to be displaced to nearby roads AND 100% of parking displacement can be accommodated but leading to 'Moderate' parking pressures on surrounding roads (i.e. available parking spaces on nearby roads will likely be reduced by 25%-50%)
Moderate B	25-50% of identified footway parking will be likely to be displaced to nearby roads AND Up to 50% of parking displacement could be accommodated on surrounding roads without introducing additional parking pressures (i.e. available parking spaces on nearby roads will likely be reduced by <25%)
Significant A	<25% of identified footway parking will be likely to be displaced to nearby roads AND 100% of parking displacement can be accommodated but leading to 'Significant' parking pressures on surrounding roads (i.e. available parking spaces on nearby roads will likely be reduced by >50%)
Significant B	25-50% of identified footway parking will likely be displaced to nearby roads AND Up to 50% of parking displacement could be accommodated but 'Moderate' parking pressures will be introduced on surrounding roads (i.e. available parking spaces on nearby roads will likely be reduced by 25%-50%)
Significant C	>50% of identified footway parking will be likely displaced to nearby roads AND 100% of parking displacement can be accommodated on surrounding roads without introducing additional parking pressures (i.e. available parking spaces on nearby roads will likely be reduced by <25%)
Significant D	>50% of identified footway parking will be likely displaced to nearby roads AND 100% of parking displacement can be accommodated but leading to 'Significant' parking pressures on surrounding roads (i.e. available parking spaces on nearby roads will likely be reduced by >50%)

Table 4.5

- 4.6** Of the 151 red classified roads only 8 or 5% were suspected of causing a significant impact which may require mitigation measures to be introduced such as double yellow lines. The eight significant impact roads represent 0.4% of the roads in Midlothian.

Red Classification		
Impact	Number	Percent
None	130	86%
Minor	8	5%
Moderate	5	3%
Significant	8	5%
<b>Total</b>	<b>151</b>	<b>100%</b>

Table 4.6



- 4.7** The eight streets where significant impact on pavement parking displacement is anticipated are listed in table 4.7.

Street	Town
Almond Crescent	Bonnyrigg
Argyll Place	Bonnyrigg
Auld Coal Grove	Bonnyrigg
Harlaw Grove	Penicuik
North Wynd	Dalkeith
Park Avenue	Loanhead
Park Crescent	Easthouses, Dalkeith
The Avenue	Hunterfield, Gorebridge

Table 4.7

- 4.8** It is hoped that parking behaviour change will deliver the necessary improvements and avoid the introduction of mitigation measures. A targeted, awareness campaign will also be launched during the transition period where behavioural change will be the focus and compliance with the prohibitions will be encouraged.
- 4.9** If enforcement and introduction of mitigating measures impact on the wider road network, road safety or servicing cannot be resolved using parking restrictions and prohibitions then an Exemption Order from the regulations may be considered. If such a measure is contemplated an Exemption Order will be submitted to Council for approval. Any approval would require the budget for marking of formal parking places and the installation of associated signage.
- 4.10** It is known that inconsiderate and obstructive parking on pavements, footways, dropped kerbs and double parking causes inconvenience and accessibility issues. Therefore, it is recommended to Council that pavement, double and dropped kerb parking restrictions, as introduced by The Parking Prohibitions (Enforcement and Accounts) (Scotland) Regulations 2023, be enforced effective from 1st April 2024, prioritising locations where public safety and accessibility are impacted.

## **5 Report Implications (Resource, Digital and Risk)**

### **5.1 Resource**

No additional financial resource is required to enforce the Regulation through the council decimalised parking contractor who will enforce as part of normal routine.

If mitigation measures such as introduction of double yellow line restrictions are required this may require £5k to £15K of revenue funding to deliver.

### **5.2 Digital**

There are no Digital Services issues associated with any aspect of this project.

### **5.3 Risk**

Displacement of parking could potentially result in the inefficient operation of the road network, associated delays to public transport and emergency services, parking pressures in nearby streets and road safety issues.

## **6 Ensuring Equalities (if required a separate IIA must be completed)**

The project aims to address equality-related access to the pavement. The parking prohibition was introduced by the Scottish Government to reduce obstruction of pavements for pedestrians, and in particular those with mobility issues or visual impairments, or parents pushing prams and buggies.

### **Appendices**

**Appendix A – Report implication**

**Appendix B – Frequently asked questions**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☒ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☒ Sustainable
- ☐ Transformational
- ☒ Preventative
- ☒ Asset-based
- ☒ Continuous Improvement
- ☒ One size fits one
- ☐ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- ☒ One Council Working with you, for you
- ☒ Preventative and Sustainable
- ☐ Efficient and Modern
- ☒ Innovative and Ambitious
- ☐ None of the above

### A.4 Delivering Best Value

The report does not directly impact on Delivering Best Value.

### A.5 Involving Communities and Other Stakeholders

Transport Scotland/Scottish Government carried out a consultation exercise before introducing the new regulations.

<https://www.transport.gov.scot/consultation/scotland-s-pavement-parking-prohibitions-consultation-on-enforcement-regulations-for-local-authorities/#:~:text=As%20part%20of%20this%20work,to%20enforce%20these%20new%20provisions.>

### A.6 Impact on Performance and Outcomes

The report does not directly impact on Midlothian Council's performance and outcomes.

### A.7 Adopting a Preventative Approach

Applying enforcement will improve pavement accessibility and avoid those with mobility issues, visual impairments, or parents pushing prams and buggies going on to the road to avoid vehicle obstruction on pavements.

### A.8 Supporting Sustainable Development

Not applicable.

## **APPENDIX B - Frequently asked questions:**

### **Am I likely to be issued with a fine (PCN) if I park on the pavement, double park or park across a dropped kerb?**

Yes, Parking Attendants will be patrolling and Penalty Charge Notices may be issued at any time of the day. Please make sure you observe these rules to assist other road users, including wheelchair users and children in buggies to travel safely.

### **What is the value of the fine?**

The fine is £100 reduced to £50 if paid within 14 days of issue.

### **There is nowhere else to park, what can I do?**

In some locations, some residents may feel they have had no option but to park on the footway/pavement. This is no longer legal. You will need to find an alternative location to park.

### **If I park on the road, I will block the traffic – what I am supposed to do?**

In most cases, parking with all four wheels of your vehicle on the road carriageway should not block the road to other traffic. If that is the case, it would be advisable to park elsewhere because it is an offence to block traffic and Police Scotland may take action. It is recognised that more vehicles on the carriageway may serve to reduce overall traffic speed in some streets.

### **Can I park on a grass verge or grass strip?**

No, the pavement parking ban includes grass verges so these must be avoided. As a rule of thumb, if a pedestrian can walk on it, it should be avoided.

### **I heard the rules did not apply when loading?**

There is an exception in the rules that seeks to support some traders to continue making deliveries. This only applies to activity in the 'course of business' so does not apply to personal activities like unloading shopping or lifting young children out of a car. Delivery drivers can only park on the pavement when the following two conditions apply - 1) There must be no reasonable place to park fully on the road, and 2) there is still 1.5m of pavement width between their vehicle and any wall, fence or bush. If these two conditions apply, then the maximum length of time for the delivery driver being parked on the pavement is 20 minutes.

### **Can I drop a passenger off, or collect, on the pavement?**

No, you shouldn't drive on to the pavement to allow a passenger to board or alight your vehicle. If you are observed sitting behind the steering wheel, while parked on a pavement, a Parking Attendant will ask you to move before issuing a Penalty Charge Notice.

### **I only had one wheel on the pavement – will I get penalised?**

Potentially yes, the law states that even one wheel on the pavement is enough to result in a Penalty Charge Notice being issued to your vehicle. Make sure you park with all four wheels on the road.

**My pavement is wide with room for both cars and pedestrians – why can't I park there?**

The guidance with the new legislation explains that exemptions should only be given in certain circumstances and pedestrians should be prioritised. If there is sufficient space on the carriageway for drivers to park, and still allow vehicles to pass, it is not appropriate to allow an exemption. Most pavements have not been designed to take the weight of vehicles and can be damaged by persistent pavement parking.

**I live in a cul-de-sac and there are very few pedestrians – do the rules apply everywhere?**

Yes, the new rules apply in all streets, irrespective of their design, length or purpose.

**Do the rules apply on private roads or privately owned pavements?**

Yes, if the road is available to pedestrians to use, the rules will apply irrespective of ownership.

**I am a Blue Badge holder. Do these new rules apply to me?**

Yes, all these rules apply. There are no exceptions for Blue Badge holders.

**Is there going to be signage to show me where I can't park?**

No, the default position is that parking on the pavement is banned. Parking across dropped kerb crossing points is also banned. Signage will only be provided where there is a formal exemption to the rules.

**Can I park across my own driveway?**

Potentially yes, if you are sure that the dropped kerb for the driveway does not also serve as a crossing point for pedestrians. You should not park across someone else's driveway.

**How can I tell if the dropped kerb is used as a crossing point?**

Generally, it will be clear because there will be no corresponding driveway or garage for a vehicle to enter. You should consider how a wheelchair user might want to cross from one pavement to another. If you are in doubt, it would be advisable to avoid the dropped kerb and park elsewhere.

## **Covert Surveillance Annual Report**

### **Report by Executive Director, Place**

#### **Report for Noting**

#### **1 Recommendations**

Council is invited to note the terms of this report.

#### **2 Purpose of Report/Executive Summary**

The purpose of this report is to advise the Council of covert surveillance actions in terms of the Regulation of Investigatory Powers (Scotland) Act 2000 ("RIPSA") by the Council during 2023.

**Date: 21 February 2024**

**Report Contact:**

**Alan Turpie, Legal and Governance Manager**

[alan.turpie@midlothian.gov.uk](mailto:alan.turpie@midlothian.gov.uk)

0131 271 3667

### 3 Background

- 3.1** In some circumstances, it is necessary for Midlothian Council employees, in the course of their duties, to make observations of a person or persons in a covert manner, i.e. without that person's knowledge, or to instruct third parties to do so on the Council's behalf. By their nature, actions of this sort are potentially intrusive (in the ordinary sense of the word) and may give rise to legal challenge as a potential breach of Article 8 of the European Convention on Human Rights and the Human Rights Act 1998 ("the right to respect for private and family life").

The Regulation of Investigatory Powers (Scotland) Act 2000 ("RIPSA") provides a legal framework for covert surveillance by public authorities such as Midlothian Council. Any covert surveillance by officers must be carried out in terms of the [Council's Covert Surveillance Policy](#). The objective of this policy is to ensure that all covert surveillance by Midlothian Council employees is carried out effectively, while remaining in accordance with the law.

- 3.2** It must be stressed that Midlothian Council does not engage in surveillance activities which are legally classed as "intrusive" e.g. phone tapping or mail interception. The Council's covert surveillance has simply involved test purchasing, social media, noise monitoring or CCTV of anti-social behaviour.
- 3.3** The Council's covert surveillance policy requires that, if an investigating officer considers it necessary, any surveillance must be approved by one of the five Authorised Officers within the Council (the Chief Executive, Executive Director, Place, Executive Director, Children, Young People and Partnerships, Chief Officer, Place and the Legal and Governance Manager). These authorisations and consequent reviews and cancellations are then stored within legal services in line with the Council's data retention policies.
- 3.4** Whilst the Council has never made prolific use of covert surveillance (peak usage being 42 cases in 2012/13 and 22 cases in 2014/15), there has been a downward trend in the Council's surveillance activities in recent years although numbers are starting to rise slowly following the pandemic. The Council only carried out 4 covert surveillance activities in 2023.

It must be noted that none of these activities disclosed sensitive or personal data.

The Council has not authorised any Covert Human Intelligence Sources during this period.



- 3.5** The Council not only has the Covert Surveillance Policy referred to above but also has [Covert Human Intelligence Sources](#) and [Surveillance through Social Media](#) policies. These Policies were all reviewed during 2022, the updated versions were approved by the Corporate Management Team and the final versions were reported to Council on 21 March 2023. The current versions of these policies are hyperlinked within this report and available on the Council's website. Members are reminded of the terms of the Policies.

#### **4 Report Implications (Resource, Digital and Risk)**

##### **4.1 Resource**

None

##### **4.2 Digital**

None

##### **4.3 Risk**

There are no risks inherent in this report, however, if the procedures outlined in the Covert Surveillance Policy are not followed, any evidence acquired may have been acquired unlawfully. It may therefore not be admissible in court, and the Procurator Fiscal is unlikely to take proceedings on the basis of such evidence. Midlothian Council may also be exposed to legal action.

##### **4.4 Ensuring Equalities (if required a separate IIA must be completed)**

This report does not recommend any change to policy or practice and therefore does not require an Equalities Impact Assessment.

##### **4.4 Additional Report Implications**

See Appendix A

## **Appendices**

### **Appendix A – Additional Report Implications**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

Not applicable

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☐ Sustainable
- ☐ Transformational
- ☐ Preventative
- ☐ Asset-based
- ☐ Continuous Improvement
- ☐ One size fits one
- ☒ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☐ Preventative and Sustainable
- ☐ Efficient and Modern
- ☐ Innovative and Ambitious
- ☒ None of the above

### A.4 Delivering Best Value

The report does not directly impact on delivering Best Value

### A.5 Involving Communities and Other Stakeholders

The report does not directly relate to involving communities.

### A.6 Impact on Performance and Outcomes

The report does not directly impact on Midlothian Council's performance and outcomes.

### A.7 Adopting a Preventative Approach

Not applicable

### A.8 Supporting Sustainable Development

Not applicable

## **Pre-Election Publicity Guidance**

**Report by Dr Grace Vickers, Chief Executive**

**Report for Information**

### **1 Recommendations**

The Council is asked to note the terms of the Council's Pre-Election Publicity Guidance in advance of the forthcoming UK Parliamentary General Election.

### **2 Purpose of Report/Executive Summary**

The purpose of this report is to update Members of the terms of the Council's Pre-Election Publicity Guidance which has previously been approved to ensure that Council facilities are not used to support any particular political party in any election, by-election or referendum.

**Date 13 March 2024**

**Report Contact:**

Alan Turpie, Legal and Governance Manager

[alan.turpie@midlothian.gov.uk](mailto:alan.turpie@midlothian.gov.uk)

### **3 Background/Main Body of Report**

- 3.1** Local authorities are prohibited by section 2 of the Local Government Act 1986 from publishing any material which appears to be designed to affect public support for a political party. Publicity is defined very widely. It includes 'any communication, in whatever form, addressed to the public at large or to a section of the public.'

The Council also has duties under common law to taxpayers which prohibit the use of public funds and the activities of Council officers where the Council is not fulfilling its statutory functions. With some limited exceptions specified in the Guidance, any support given to political parties or election candidates is very likely to breach this obligation.

For the avoidance of doubt, it should be noted that these duties apply at all times but the implementation is particularly sensitive during the pre-election period.

- 3.2** The date of the next UK Parliamentary General Election has not yet been announced but in terms of the Dissolution and Calling of Parliament Act 2022, Parliament must be dissolved no later than 17 December 2024 and the general election held 25 working days after that date (i.e. 28 January 2025).
- 3.3** The Council has some discretion when the pre-election period starts but it cannot be later than the publication of the Notice of Election. The Civil Service use the date of dissolution of Parliament as the start of the pre-election period. Given the sensitivity of actions prior to an election, it is intended that the Council will follow that practice and enter the pre-election period on the date of dissolution. The pre-election period will then run to close of poll.
- 3.4** The Guidance is as attached as Appendix B to this report and members are referred to that Appendix for its terms.
- 3.5** The Guidance should not prevent Councillors from carrying out their Council duties during that time nor in using Council facilities to do so; rather it is the use of Council facilities to affect support for any party or candidate that is to be prevented.
- 3.6** Members will be aware that the Election Act 2022 introduces the requirement that voters show photo ID at Polling Stations. It is proposed to run a communications campaign in the run up to the Election to advise the voters of the accepted forms of photo ID and also of the right to apply to the Electoral Registration Officer at the Valuation Board for a Voter Authority Certificate if other forms of ID are not available. The list of accepted forms of Photo ID is attached as Appendix C to this report.

#### **4 Report Implications (Resource, Digital and Risk)**

##### **4.1 Resource**

There are no resource implications arising from this report.

##### **4.2 Digital**

There are no digital implications arising from this report.

##### **4.3 Risk**

There is risk in relation to the Council's reputation if the Guidance is not fully adhered to during the pre-election period.

##### **4.4 Ensuring Equalities (if required a separate IIA must be completed)**

This report does not recommend any change to policy or practice and therefore does not require an Equalities Impact Assessment.

##### **4.5 Additional Report Implications**

See Appendix A

#### **Appendices**

**Appendix A – Additional Report Implications**

**Appendix B – Pre-Election Period Guidance**

**Appendix C – Accepted forms of Photo ID**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

Not applicable

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- ☐ Modern
- ☐ Sustainable
- ☐ Transformational
- ☐ Preventative
- ☐ Asset-based
- ☐ Continuous Improvement
- ☐ One size fits one
- ☒ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- ☐ One Council Working with you, for you
- ☐ Preventative and Sustainable
- ☐ Efficient and Modern
- ☐ Innovative and Ambitious
- ☒ None of the above

### A.4 Delivering Best Value

The report does not directly impact on Delivering Best Value

### A.5 Involving Communities and Other Stakeholders

The report does not directly relate to involving communities

### A.6 Impact on Performance and Outcomes

The report does not directly impact on Midlothian Council's performance and outcomes

### A.7 Adopting a Preventative Approach

Not applicable

### A.8 Supporting Sustainable Development

Not applicable

## APPENDIX B

Appendix B - Pre-Election Period Guidance

Appendix C – Accepted forms of Photo ID

## Pre-election period guidance – Midlothian Council

Use ctrl+click to browse this document using the links.

### Contents

1. [Applicability](#)
  - Elections / referendums
  - Timescales
  - Independent organisations
2. [Key points](#)
3. [Background and timing](#)
  - What is the pre-election period?
  - Timing of the pre-election period
  - Legal and other obligations
4. [Premises](#)
  - Definition
  - Use as offices and for public meetings
  - Visits to Council premises by candidates
  - Use of Council premises for publicity
  - Candidate's posters and other advertising
  - Surgery Notices
5. [Publicity](#)
  - General
  - Specific points on local government elections
  - Opening ceremonies or other events
  - Media requests
  - By-elections
  - Referendums
  - Social Media
6. [Other issues](#)
  - Staff candidature
  - Staff - other political activity
  - Working relationships between staff and councillors
  - Use of Council facilities and resources by councillors
  - Freedom of Information requests



7. [Questions and answers](#)
8. [Contacts and further information](#)

## **1. Applicability**

(Back to [contents](#))

### *Elections / referendums*

These guidance notes apply to all elections: local government, Scottish parliament and UK parliament . Some provisions also apply to by-elections (discussed in section 5). The guidance will also apply to referendums. In the case of Referendums, references in this guidance to political parties and candidates should be interpreted as referring to Designated Organisations, Permitted Participants and campaigners as appropriate.

Where there may be specific issues relating to particular elections these are covered in the notes.

### *Timescales*

Although the formal pre-election period begins with the issuing of the notice of election, care should be taken in the few days immediately before this to avoid any potential perception of political partiality.

### *'Independent' organisations*

Care should be taken to ensure that projects, initiatives or organisations funded by an authority do not create the potential for allegations that public money is being used in support of a party or candidate. This is likely to be less of an issue where funding is general, as opposed to funding for, say, communications activity by an organisation.

## 2. Key points

(Back to [contents](#))

While there are some specific areas that required detailed advice, the essence of this guidance is:

- Council staff must discharge their duties in a politically neutral way at all times.
- There is particular sensitivity around this political neutrality in the run-up to an election.
- Particular care needs to be taken to ensure that any events, publicity or other communications are politically neutral.
- Council facilities and resources must not be used in support of a political party or election candidate.
- Councillors, if standing as a candidate in any election, are still entitled to use Council facilities and resources whilst acting on constituency or Council business.
- Unless otherwise stated, it should be assumed that normal Council business will continue.
- Unless otherwise covered by this guidance, staff should respond positively to requests for information or advice from parties or candidates.

### **3. Background and timing**

(Back to [contents](#))

#### **What is the pre-election period?**

It is the period between the announcement of an election and the date of the election. It is generally taken to be from the publication of the notice of election until polling day, inclusive of both days. This is the definition referred to in the Code of Recommended Practice on Local Government Publicity, which guides local authorities on fulfilling the requirements of section 2 of the Local Government Act 1986.

In respect of a Referendum, the period will run from the announcement of the date of the Referendum with specific, more onerous rules operating in the period from 28 days before the day of poll.

The main significance of the pre-election period is in the need for heightened sensitivity, to ensure that public resources are not used in any way that might influence the result of an election.

The pre-election period has commonly been known as ‘purdah’. However, this is felt by some to be an inappropriate term because of its cultural and religious origins in referring to the separation of women from men.

#### **Timing of the pre-election period**

Local authorities have some discretion on the exact timing of the publication of the notice of election, although it needs to be within a timeframe which is set out in legislation according to individual elections.

It is worth noting that the civil service tends to use the date of dissolution of parliament as the beginning of its pre-election period, as opposed to the notice of election. This can lead to the UK and Scottish governments, and their agencies, using different pre-election period dates however.

The section of a local authority responsible for elections management should communicate to its elected members and staff the date of the pre-election period. It is usually helpful if this is done several months in advance to help with event and other planning.

In some authorities, convention – although not law – means that the pre-election period is effectively observed a few days before it officially begins.

#### **Legal and other obligations**

Local authorities are prohibited by section 2 of the Local Government Act 1986 from publishing any material which appears to be designed to affect public support for a political

party. Publicity is defined very widely. It includes 'any communication, in whatever form, addressed to the public at large or to a section of the public.'

The Council also has duties under common law to taxpayers which prohibit the use of public funds and the activities of Council officers where the Council is not fulfilling its statutory functions. Unless otherwise specified in this guidance, any support given to political parties or election candidates is very likely to breach this obligation.

For the avoidance of doubt, it should be noted that these duties apply at all times but the implementation is particularly sensitive during the pre-election period.

Staff and elected members also have obligations under their respective codes of conduct.

Between the time of publication of a notice of an election and polling day, publicity should not be issued which deals with controversial issues, or which reports views or policies in a way that identifies them with individual members and groups of members.

The following publicity activities should therefore not take place during the formal election campaign period -

- Any proactive media releases/ media activity, including photocalls, involving cabinet portfolio holders, election candidates or elected members or mentioning any political party.
- The publication of any Council material (with the exception of election-related materials) that identifies, in any way, an election candidate or a political party.

Reactive media inquiries are business as usual and, in some circumstances, may involve the relevant cabinet portfolio holder (see section 5 for further details).

Any other activities will require to be considered in terms of the legislation and the relevant Code of Conduct.

#### **4. Premises**

(Back to [contents](#))

##### *Definition*

Council premises can include schools, offices, depots, stores and care homes where access is generally controlled or limited.

It can also include other spaces which might generally be open to the public but where there is an element of control, e.g. leisure centres and parks.

In this context, it is not taken to include public roads and pavements.

#### **Use as offices and for public meetings**

(Back to [contents](#))

The Local Government Act 1986 prevents local authorities from allowing Council premises to be used to promote support for a political party. However, there are some exceptions.

An authority may allow political parties to rent Council owned premises for use as offices, where such facilities are provided on a first-come, first-served basis on normal commercial terms.

Under the Representation of the People Act 1983 parties or candidates are entitled to use a school room for a public meeting in a Council run school within the candidate's constituency. The let will be free of charge, but the Council is entitled to be reimbursed for heating, lighting and other utilities, as well for any damage caused to the room by the let.

Candidates or their agents are required to give reasonable notice and any booking should not interfere with existing arrangements such as prior bookings or school hours.

In terms of the Representation of the People Act 1983, the Council must also prepare and keep for each constituency which is wholly or partly in its area, a list of rooms in school premises and a list of "meeting rooms" which candidates are entitled to use. Candidates are also entitled to inspect a list of these rooms. The list of such premises within Midlothian is attached as an appendix to this guidance.

During a referendum, "Designated Organisations" may also use these rooms on the same basis as above during the 28 day period prior to the Referendum in terms of schedule 12 of the Political Parties, Elections and Referendums Act 2000

#### **Visits to Council premises by candidates**

(Back to [contents](#))

As the election approaches, candidates may wish to visit Council premises to meet residents, e.g. in residential homes, or to be seen within the area, or to become more

familiar with Council facilities. The Council has previously allowed such visits subject to management rules but it has now been decided that, subject to the exceptions listed below, no candidate shall be allowed to visit Council premises from the date of nomination until the close of poll.

This moratorium will not apply however in the following circumstances:

- Premises rented by the Council to third parties on a commercial basis where entry shall be at the discretion of the tenant
- School rooms and other meeting rooms made available to candidates in terms of the Representation of the People Act 1983
- Visits at the invitation of a resident to their room in a Council residential home or hostel
- Visits to Council premises for business and Council meetings;
- Any activity in a Council managed public open space which has been approved by the Chief Executive (or her nominee); and
- Visits to Council premises by an elected member whilst acting in that capacity

### **Use of Council premises for publicity**

(Back to [contents](#))

#### *Visits by candidates*

The media may request the use of a council establishment to highlight a general aspect of the election. This may or may not involve election candidates or parties. The decision on whether to agree or not to such media requests will be taken by the relevant Executive Director in consultation with Communications.

In reaching their decision, the Executive Director should consider if such use by the media will favour one particular candidate or party, any sensitivities around the particular venue and its users, and the possible staff resource implications. Whatever decision is reached, it should be equally applied to all parties and candidates.

If the media is involved in a visit, employees must not be photographed, recorded or televised with prospective candidates. The consent of clients or service users must be sought and not assumed. The Council has media relations consent forms in place for situations where the people involved are under 16 or deemed to be vulnerable adults, and consent in these situations must be recorded and retained as per normal practice for media consents. The Executive Director(s) will be advised on this aspect by Communications.

An individual who lives in a Council residential home or hostel has a right, as an elector, to invite candidates and the media into their own room.



### *Visits by politicians other than candidates*

It is likely to be permissible for a sitting politician, who is not affected by a forthcoming election, to visit Council premises and seek publicity for this. Such visits are to be discouraged during the pre-election period but may be approved if there are exceptional circumstances. However, any candidates should not have a formal role at such events and Council staff should not facilitate any publicity involving election candidates, e.g. interview requests or photo opportunities.

Please note that a visit by an elected member of the Council, even if a candidate in the election, on constituency business should always be permitted.

### *Visits to Schools*

The franchise for the Scottish Parliamentary and Local Government Elections have been extended to 16 and 17 year olds. Accordingly, unless otherwise approved by the Executive Director, Children, Young People and Partnerships, no visits by politicians, candidates or campaigners will be permitted to secondary schools during teaching time in the pre-election period for those elections.

### *Party political broadcasts*

Council premises should not be used for the filming of party political broadcasts.

## **Candidate's posters and other advertising**

(Back to [contents](#))

Political posters are not permitted on streetlights, other street furniture (e.g. traffic lights, railings and benches) and roads (including verges, central reservations and roundabouts). Any posters on Council property will be removed. The Council does not however have any power to remove posters from other properties.

The Council will not object to A Boards being placed on the pavement outside polling stations on the day of poll provided these boards do not obstruct the public right of passage. The question of whether an obstruction is being caused will be a matter for Police Scotland.

Party political or campaigning material should not be placed on notice boards or displayed in Council buildings. This will include, for the avoidance of doubt, the display of materials visible in the windows of all offices in Council buildings, including those made available for use by elected members.

## **Surgery notices**

Sitting MPs, MSPs and councillors may have surgery notices displayed in Council premises. These can continue to be displayed during the pre-election period providing it is the usual notice which is being displayed.

There is one exception to this rule: sitting politicians for a particular election who no longer hold office once the notice of election is published whose posters must be removed. For example, an MP ceases to be an MP in the pre-election period for the UK Parliament elections and should have their posters removed. Other sitting politicians may continue to publicise their surgeries and, in particular as Councillors remain in post until the day of poll for a local government election, any such posters should not be removed.

## 5. Publicity

(Back to [contents](#))

### General

As the definition of publicity is very broad, and any content subject to interpretation, it is not possible to be prescriptive about what publicity is permissible or otherwise and each situation has to be discussed on its own merits. Publicity can cover news releases, publications, events, photos and videos. It also includes online and social media communications as well as 'traditional' publicity.

In determining whether publicity should be allowed, the main factors to take into account are:

- The content and style of the material.
- The time and circumstances of the publication.
- The likely effect of the material on those to whom it is directed.
- Whether the material promotes or opposes a point of view on a question of political controversy which is specifically identifiable as the view of one political party but not of another.
- Whether to not the material contains references to any political party or to person identified with a political party.
- Where the material is part of a campaign, the effect that the campaign appears to be designed to achieve.
- The extent to which any activity is 'business as usual' or where the timing might be beyond the reasonable control of the authority.

The key test is whether a particular act can be perceived as seeking to influence public opinion or to promote the public image of a particular candidate, or group of candidates (whether or not they are existing members).

### Specific points on local government elections

Public statements (reactive and proactive) may need to quote the relevant councillor responsible for a particular portfolio. Great care should be taken to ensure that any content is clearly and directly relevant to the service or issue being discussed and reflects an agreed Council decision or policy. It must not be a general comment on the position or achievements of the sitting administration.

Any Council newspapers or newsletters should not be published during the pre-election period. Routine publications advising on council services, such as Tonezones or the Midlothian Snowsports Centre at Hillend, may be published during the pre-election period.

It is worth noting that councillors remain as councillors until the day of poll for a local government election.

## **Opening ceremonies or other events**

Official openings or events, whether or not specifically designed to attract publicity, should not take place during the pre-election period before a local government election. Any variation on this must be agreed by the relevant Executive Director and be justified on the grounds of exceptional unavoidable and/or unforeseen circumstances.

## **Media requests**

In general, media requests for general filming or photo opportunities around elections should be treated as they would be normally. The only issue that would arise is if there is any question of the media outlet taking a particular stance that may be, or may be perceived to be, in favour of one party or candidate.

Requests to organise or cover hustings events would normally be permissible on the basis that they are open to all relevant candidates. In the case of broadcasters, there are strict rules that apply to maintain political neutrality and an authority should assume that the broadcaster concerned will meet its own obligations in this regard.

## **By-elections**

Particular care should be taken to avoid any publicity in the ward or constituency affected by a by-election during the period after the notice of election has been issued.

Depending on the circumstances, it may also be appropriate to stop normal Council publicity on the day before and the day of polling.

## **Referendums**

The Council may not publish any promotional material relating to a referendum within a period of 28 days prior to the referendum polling date in terms of section 125 of the Political Parties, Elections and Referendums Act 2000. This restriction is on all material regardless of political content or neutrality.

In terms of that Act, publish is defined as “make available to the public at large, or any section of the public, in whatever form and by whatever means.” “Promotional Material” is also widely defined as material which:

- Provides general information about the referendum
- Deals with any of the issues on which the referendum is being held
- Puts any argument for or against any issue on the referendum or
- Is designed to encourage voting at the referendum.

Schools and other educational establishments may wish to teach pupils about the terms of the Referendum and this should not be affected by the prohibition. Head Teachers and heads of other educational establishments should however seek clearance and guidance

from the Executive Director, Children, Young People and Partnerships if they receive requests for Referendum related activities from outside bodies before agreeing to them.

## **Social Media**

The Council hosts a number of social media profiles. Nothing will be permitted on any of these pages to promote political messages, support for a particular candidate(s) or any other political content. Any such messages, whether posted by or on behalf of the Council or by third parties, will be removed.

Councillors will be entitled at all times, including during the pre-election period, to post any political content or viewpoint on their own social media accounts even if the account refers to the Councillor as an elected member. It is only the use of the Council's social media for electioneering purposes that is prohibited by this guidance.

## **6. Other issues**

(Back to [contents](#))

### **Staff candidature**

If a Council employee in a political restricted post wishes to stand for election (whether to the Council, Scottish parliament or UK parliament) they must resign their post.

A Council employee not in a politically restricted post may stand for election to the Council without resigning their post but must resign within one day of the declaration of the result should they be elected otherwise they cease to be an elected member and will cause a by election.

### **Staff - other political activity**

Staff in politically restricted posts should not undertake any political activity at any time.

Staff in posts that are not politically restricted may carry out political activity. However, if they are a witness for any election-related documents or otherwise personally involved in support for a particular party or candidate, they must not be involved with polling or counting.

### **Working relationships between staff and councillors**

Some employees may have a close working relationship with councillors. It is important that this close working relationship is not compromised in any way. If an employee is asked by a councillor to provide assistance with a matter which is clearly party political or which does not have a clear link with the work of the Council, they should politely refuse and inform the councillor that they are referring the matter to their line manager for guidance. This rule also applies if a councillor seeks assistance of behalf of a candidate in the elections.

This rule applies at any time and not just during the pre-election period

### **Use of Council facilities and resources by councillors**

Facilities and resources provided by the Council for councillors to help them carry out their duties must never be used for party political or campaigning activities. This includes computer equipment, telephones, stationery and secretarial support. This is not an exhaustive list and councillors should check if they are not sure what is appropriate.

Communications by councillors to their constituents come within the definition of publicity detailed above, except where they are in response to particular issues initiated by their own constituents. Use of Council facilities for unsolicited mailings during this period should be made with extreme caution. To avoid any suggestion that actions may be motivated by the forthcoming elections, councillors should not issue communications to constituents in a form or style which they have not used before.

### **Freedom of Information requests**

There are no implications for FOI or other information requests covered by legislation. These should be handled as normal.



## 7. Questions and answers

(Back to [contents](#))

The following are examples of issues which have arisen previously. It must be remembered that the final advice will turn on the exact circumstances and these FAQs are only given to provide an indication of the type of issues you should be considering. They are not a substitute for specific, detailed advice.

1. **A controversial item is on the agenda for a meeting of the Council or a Committee which will be held during the pre-election period. Should consideration of the item be postponed until after the election?**

No. The work of the Council should continue and the item should be considered.

2. **A school has been approached by a candidate in the forthcoming election who wishes to meet pupils and have a general discussion with them about topics of concern to them. Is it okay to allow the visit?**

No, this does not constitute “business as usual” and as such the visit will come under the moratorium in terms of section 4

3. **Officers have been asked to attend an event to give advice on Council services. Is this okay?**

Whether or not it would be appropriate for officers to attend would depend on the nature of the event, who was running it and when it is being held. If the event is associated with a particular political party and is being held during (or a day or two before the beginning of) the pre-election period then officers should not attend. If it is being held outwith this period, then you would have to decide whether the event was designed to affect support for one political party. If so, then again officers should not attend.

4. **Is it okay for an election candidate to take photographs outside a Council office or facility?**

This should not be encouraged but cannot be prevented. Candidates and officials should be aware that photography in and around schools is controlled, as any existing parental consent, whether express or implied, in relation to photographs taken for school purposes cannot be regarded as extending to the use of photographs in connection with any political campaigning.

5. **What do I do if a candidate/political party refuses to accept my decision?**

Contact your Director, who can discuss the issues raised with the Chief Executive and let you and the candidate/party know the outcome of these discussions.

6. **A candidate turns up at Council premises for a pre-arranged business meeting but there are media following them. Should the media be allowed in?**

No. This is allowing a council facility to be used for a party political activity.

**7. A public consultation meeting is scheduled during the pre-election period as part of the formal planning process for a new school. Can it go ahead?**

Yes. This is both normal business and there are significant costs attached to any delay.

**8. A party wants to use a council-managed public space for their campaign launch. Should it be allowed?**

There is a convention that certain public spaces are used for campaign activity. It is generally acceptable for these to take place so long as the events are limited, e.g. around 1 hour and that there is equal opportunity for all parties or candidates to use them. The council resource/effort in facilitating these should also be minimal, e.g. enabling access to a space.

**9. The council was intending to facilitate a debate on an important issue to our area. Should it be cancelled?**

The debate must be open to participation by all parties and candidates, and it may be advisable to limit the media participation (e.g. reactive rather than proactive). With those caveats, it could go ahead, but thought would still need to be given to whether or not the issue at hand was likely to be particularly divisive along party lines.

**10. A councillor wants to give their view on a matter debated at committee to the media. Is this allowed?**

Any councillor at any time is at liberty to do this. The tests are whether they are using council resources to do so and, if so, whether the view is (or could be perceived to be) political in nature.

**11. A charity which receives funding from the council has taken an advert in a political party's newsletter. Is this allowed?**

There are two relevant issues here: what is the council's funding for (e.g. a general grant or for a specific purpose such as communications) and what is the advert for (e.g. notice of an event or self-promotion)? Generally, this is a low-risk activity so long as there is nothing overtly political about the organisation's activity or its advert.

**12. There is an event scheduled for the launch of a new service. Can local councillors be invited? And what about other politicians?**

Such events are generally very inadvisable before a local government election and should also be avoided before other elections. If the latter, local councillors can be invited, although this should be avoided if one of the councillors is a candidate. If the Director has agreed the event can go ahead, then all candidates for that ward should be invited.

**13. We want to highlight a new initiative. Can the relevant cabinet member be involved?**

No. Proactive publicity of this kind can go ahead without elected member involvement. We will use a service user or manager in these circumstances.

- 14 **A partner organisation has asked to use a council venue for the launch of an initiative. A minister will be attending and significant media presence is expected. Can we facilitate this?**

Yes. Hiring of council venues is business as usual.

## **8. Contacts and further information** (Back to [contents](#))

### **General advice on pre-election period guidance**

Alan Turpie, Legal and Governance Manager, [alan.turpie@midlothian.gov.uk](mailto:alan.turpie@midlothian.gov.uk), 0131 271 3667

## APPENDIX

### (A) List of Rooms in School Premises

#### (i) Primary Schools

Bilston	Park Avenue, Bilston, Roslin
*Bonnyrigg	Cockpen Road, Bonnyrigg
Burnbrae	144 Burnbrae Road, Bonnyrigg.
Cornbank St James	34 Marchburn Drive, Penicuik
Cuiken	150 Cuiken Terrace, Penicuik
Danderhall	59 Edmonstone Road, Danderhall
Glencorse	Graham's Road, Milton Bridge, Penicuik
Gorebridge	2C Barleyknowe Lane, Gorebridge
Gore Glen	Whitehouse Way, Gorebridge
Hawthornden	Polton Avenue Road, Bonnyrigg
King's Park	20 Croft Street, Dalkeith
Lasswade	7A Pendreich Drive, Bonnyrigg
*Lawfield	26 Lawfield Road, Mayfield
Loanhead	34 Edgefield Road, Loanhead
Mauricewood	11 Muirhead Place, Greenlaw Mains, Penicuik
Mayfield	Stone Avenue, Mayfield
Moorfoot	41 Borthwick Castle Road, North Middleton
Newtongrange	Sixth Street, Newtongrange
Paradykes	Mayburn Avenue, Loanhead
Rosewell	85 Carnethie Street, Rosewell
Roslin	8 Pentland View Place, Roslin
Sacred Heart	Crockett Gardens, Penicuik
St Andrew's	Gowkshill, Gorebridge
St David's RC	Kippielaw, Lauder Road, Dalkeith
St Luke's RC	Stone Avenue, Mayfield
*St Margaret's RC	36 Edgefield Road, Loanhead
St Mary's RC	62A Polton Street, Bonnyrigg
St Matthew's RC	32 Carnethie Street, Rosewell
*Stobhill	1 Bonnybank Road,, Gorebridge
*Strathesk	4 Eastfield Farm Road, Penicuik
*Tynewater	32 Crichton Road, Pathhead
Woodburn	5 Cousland Road, Dalkeith

(ii)/

## (ii) Secondary Schools

Beeslack Community High School	Edinburgh Road, Penicuik	01968 678060
Dalkeith Schools Community Campus	Cousland Road, Dalkeith	0131 660 0268
The Lasswade Centre (Lasswade High School)	Eskdale Drive, Bonnyrigg	0131 271 4530
Newbattle Community Campus	Easthouses Way, Dalkeith	0131 561 6740
Penicuik High School	39A Carlops Road, Penicuik	01968 674165

In respect of primary schools marked '\*', all enquiries regarding their availability and bookings should be made with [CLLBookingandLets@midlothian.gov.uk](mailto:CLLBookingandLets@midlothian.gov.uk).

In respect of all other primary schools, enquiries and bookings should be made to Business Services using their email address at [Business.Services.Support@midlothian.gov.uk](mailto:Business.Services.Support@midlothian.gov.uk).

In respect of Dalkeith Schools Community Campus, all enquiries and bookings should be made with the BAM FM Office, 4 Cousland Road, Dalkeith EH22 2PS - Telephone 0131 660 0268.

In respect of other secondary schools, all enquiries regarding their availability and bookings should be made direct to the relevant school office.

## (B) List of Meeting Rooms

*The following premises are available for meetings. The relevant booking telephone number is shown.*

Poltonhall Recreation Ground	0131 663 7702 (Bonnyrigg Rose FC)
Rosewell Pavilion	<a href="tel:01314480103">0131 448 0103</a> (Rosewell After School Club)
Waverley Park Pavilion	0131 271 4533 (Lasswade Centre)
King George V Park Pavilion, Bonnyrigg	0131 271 4533 (Lasswade Centre)
Penicuik Town Hall	01968 664 066 (Penicuik Leisure Centre)
Roslin Community Hall	0131 444 9033 (Loanhead Leisure Centre)
Loanhead Leisure Centre	0131 444 9033
Danderhall Community Hub	0131 444 9100
Danderhall Pavilion	0131 663 9280
King's Park Pavilion, Dalkeith	0131 561 6740 (Newbattle Community Campus)
Pathhead Pavilion	0131 561 6740 (Newbattle Community Campus)
Newtongrange Leisure Centre	0131 561 5325
Gorebridge Leisure Centre	01875 821739
Birkenside Pavilion	01875 821739 (Gorebridge Leisure Centre)
Dalkeith Arts Centre	<a href="tel:01316636986">0131 663 6986</a>





## Appendix C

### Accepted forms of photo ID

You can use any of the following accepted forms of photo ID when voting at a polling place.

#### International travel

- Passport issued by the UK, any of the Channel Islands, the Isle of Man, a British Overseas Territory, an EEA state or a Commonwealth country (including an Irish Passport Card)

#### Driving and Parking

- Driving licence issued by the UK, any of the Channel Islands, the Isle of Man, or an EEA state
- A Blue Badge

#### Local travel

- Scottish National Entitlement Card issued for the purpose of concessionary travel (including a 60+, disabled or under 22s bus pass)
- Older Person's Bus Pass funded by the UK Government
- Disabled Person's Bus Pass funded by the UK Government
- Oyster 60+ Card funded by the UK Government
- Freedom Pass
- 60 and Over Welsh Concessionary Travel Card
- Disabled Person's Welsh Concessionary Travel Card
- Senior SmartPass issued in Northern Ireland
- Registered Blind SmartPass or Blind Person's SmartPass issued in Northern Ireland
- War Disablement SmartPass issued in Northern Ireland
- 60+ SmartPass issued in Northern Ireland
- Half Fare SmartPass issued in Northern Ireland

#### Proof of age

- Identity card bearing the Proof of Age Standards Scheme hologram (a PASS card), for example a Young Scot card

#### Other government issued documents

- Biometric immigration document
- Ministry of Defence Form 90 (Defence Identity Card)
- National identity card issued by an EEA state
- Electoral Identity Card issued in Northern Ireland
- Voter Authority Certificate
- Anonymous Elector's Document