Arneil Johnston

Dundee City Housing Market Partnership

Housing Need & Demand Assessment Final Report

November 2022

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Appendix A: Core Output 2: Dundee Data book
Appendix B: May 2021 Dundee Stakeholder Engagement Workshop report

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HOUSING ESTIMATES - YEARS 10 TO 15		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	330	485
PRIVATE RENT	219	323
BELOW MARKET HOUSING	201	296
SOCIAL RENT	171	253
Total additional future housing units	**921**	**1,357**

HOUSING ESTIMATES - YEARS 15 TO 20		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	242	413
PRIVATE RENT	162	275
FELOW MARKET RENT	135	230
SOCIAL RENT	109	186
Total additional future housing units	**648**	**1104**

CUMULATIVE TOTAL AT END OF PROJECTION		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	869	1,436
PRIVATE RENT	578	957
BELOW MARKET HOUSING	535	888
SOCIAL RENT	2,718	3,029
Total additional future housing units	**4,700**	**6,310**

2021 Dundee City HNDA Housing Market Partnership Signatories

The following named senior housing and planning managers from Dundee City Council have signed this document confirming that they have produced this HNDA and agreed the Core Outputs.

This statement is in fulfilment of the requirements of Core Process 6 as detailed in the HNDA Practitioners Guide (December 2020).

Authorised by	Local Authority	Signature
Name David Simpson Designation Head of Housing and Communities Email address david.simpson@dundeecity.gov.uk	Dundee City Council	
Name Gregor Hamilton Designation Head of Planning and Economic Development Email address gregor.hamilton@dundeecity.gov.uk		

Producing an HNDA is the first stage in the housing planning process

The HNDA methodology and process is detailed in Scottish Government Guidance, which offers a toolkit and sets out the approach to build the evidence needed to:

Assess the contextual factors that influence housing requirements and delivery **Housing market drivers** **Housing pressures & solutions**	Calculate the number of additional homes that are needed in the Tayside area over the next 20 years **HNDA Calculation Tool**	Produce long term broad housing estimates to inform local decision making **Housing Supply Targets** **Housing land allocations**	HNDA estimates provide evidence to set Housing Supply Targets in Local Housing Strategies and Local Development Plans Considers local factors but should provide basis for a generous supply of housing land

The previous Housing Need & Demand Assessment for the Tayside Region was produced by the TAYplan Strategic Development Plan Authority. The Planning (Scotland) Act 2019 removed the requirement for strategic development plans and the associated authorities. Local Authorities may now choose to work together in regional partnerships to assess housing need and demand across functional housing market areas. On this basis, four local authority partners from across the Tayside region have come together to produce the 2021 HNDA.

The Tayside Housing Market Partnership is made up by the following partners

Angus Council; Dundee City Council; Fife Council (In relation to the North Fife area); Perth & Kinross Council

1.2 Tayside HNDA Methodology

Arneil Johnston was commissioned to deliver a Housing Need & Demand Assessment for Tayside Housing Market Partners in October 2020. To produce the evidence and calculations required, a nine-stage methodology was developed and agreed with the Tayside Housing Market Partnership.

The methodology focuses on producing the prescribed requirements for a robust and credible HNDA, through extensive desk based analysis and research. As secondary data has major limitations in providing consistent, real time data on the circumstances, needs, aspirations and future expectations of households living in the Tayside area; a primary research study was also commissioned to address gaps in insight and to allow credible analysis at a Housing Market Sub-area level. Working in partnership with Arneil Johnston, Resource Research carried out an extensive household survey across the Tayside area, reporting in April 2021.

As well as producing analysis to deliver the contextual insight on what's driving housing need and demand, and how housing need could be met by the existing housing stock or through specialist forms of provision (HNDA Core Outputs 1, 2 and 3); the HNDA evidence base was used to produce housing estimates detailing the number of new homes required to meet future housing need across the Tayside area and in each partner area including Dundee City.

This final report focuses on Dundee City HNDA evidence, outcomes and key issues, providing a high level overview of each Core Output as well as outcomes from the primary research and stakeholder engagement processes.

1.4 Quality Control

HNDA processes and outcomes have been scrutinised rigorously throughout the study period and are subject to detailed quality assurance procedures. This includes triangulating a range of data sources to ensure variations or anomalies are accounted for, and that HNDA calculations are based on, or derived from, evidence that is high quality, fit-for-purpose and aligns with local, professional validation.

The Tayside HMP governance arrangements, which apply to the Dundee City HMP, have provided project management and quality control oversight in relation to key HNDA processes and activities including:

- project managing the overall programme for HNDA production
- coordinating and validating the production of Core Output materials including proofing interactive briefings, data-books and stakeholder engagement materials
- coordinating and validating primary research materials including the production of survey tools, final reporting materials, crosstabulations
- validating the accuracy and credibility of HNDA calculation inputs and assumptions and providing final sign off on HNDA calculation scenarios and housing estimates
- proofing and validating all final HNDA reporting outputs and digital materials.

Consultants commissioned to produce HNDA outcomes were selected on their commitment to complying with professional standards and Codes of Conduct, as well as the quality systems in place to ensure data accuracy and integrity e.g.

- Arneil Johnston: Quality system based on requirement of BS EN ISO 9000, plus CIH and CIPFA professional practice standards
- Research Resource: MRS Code of Conduct and ISO20252:2012 – Market, Opinion and Social Research

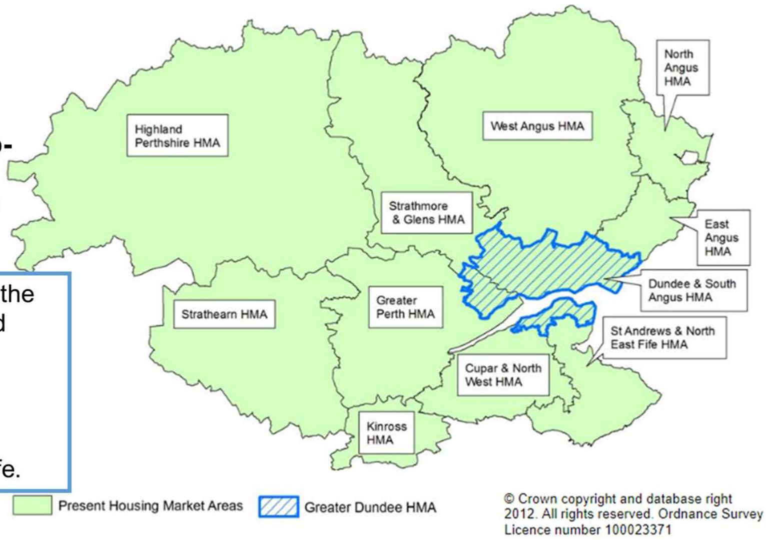
Final drafts of the individual chapters of the HNDA have been subject to thorough proof-reading to ensure both narrative and tabulated figures are accurate, consistent and fully evidenced.

The Greater Dundee HMA operates as a functional Housing Market Area centred on the City of Dundee

This area includes wider partner sub-market areas where significant house sales are made to purchasers from Dundee

The Greater Dundee HMA extends beyond the administrative boundary of Dundee City and includes areas in:

- the eastern Carse of Gowrie in Perth & Kinross,
- South Angus and
- Newport, Tayport and Wormit in North Fife.



Purchaser Origin	Dundee City
Dundee City	63%
Adjoining Councils	20%
Glasgow & Edinburgh	3%
Other Scotland/UK	15%
Dundee City	63%
2nd main origin	Angus

Table 2.1: HMA Self Containment/Migration Outcomes in Dundee City HMA

3.2 2021 HNDA Household Survey: Dundee City Outcomes

The 2021 Tayside HNDA household survey succeeded in delivering credible insight into housing need and demand across Dundee City, providing consistent up to date measures of housing need for the purposes of calculating housing estimates. The level of data accuracy achieved by the survey sample ensures that partners can be confident in using this research to inform housing and development planning policy judgements.

Furthermore, the survey intelligence provides crucial contextual evidence of housing market drivers, housing stock pressures and the need for specialist housing solutions across the region. This insight has been used to meet the requirements of HNDA Core Outputs detailed in Chapters 4 – 7 of this report.

Headline findings from 2021 HNDA Survey for Dundee City can be summarised as follows:

19% need to move to a more suitable home

28% would like to move elsewhere

6% are sharing amenities with another household

20% have too few rooms in their current homes

36% have property condition or disrepair issues in their current home

25% Spend more than 25% of their income on housing costs

29% moved home in the last 5 years

28% have someone living in their household who will form a new household in the next 5 years

47% have life limiting illness or disability

42% with a LLTI or disability live in a home not suitable for their needs

13% have a household member who needs specialist accommodation

Affordability issues for the local housing market	• **Household incomes:** According to Scottish Government income estimates for 2018, the median income in Dundee in 2018 was £24,440. It is the lowest median income within the Tayside partner area with the highest being in Perth & Kinross (£30,160). This profile reflects the median income benchmarks which populate the HNDA Tool v4.0 (sourced from CACI Paycheck data). • Between 2014-18, Dundee median household incomes increased by 2% from £23,920 in 2014 to £24,440 in 2018. • Analysis of data from the Scottish House Condition Survey (SHCS) 2017-19 reveals that the average income in Dundee was £23,500, which is significantly lower than both Scotland (£29,100) and all other Tayside partner areas. • CACI Paycheck data (2020) sets the median income in Dundee at £24,628 which is slightly higher than both Scottish Government 2018 estimates and SHCS estimates 2019. • ONS Annual Survey of Hours and Earnings (2020) suggests a median weekly pay for all employees in Dundee is £460. • **Access to Mortgage Finance:** Analysis from Bank of England data detailing residential loans provided via the FCA, shows that first time buyer mortgages accounted for 21-24% of all mortgage loans between 2015-22, with a rise of almost 3% taking place between 2019 and 2020. • The percentage of home-owners re-mortgaging accounted for 28% of all mortgages in Q4 2021 which is its highest rate since 2017. The Covid pandemic coupled with stricter bank lending requirements on large LTV mortgages have played a role with the figure for 2021 bouncing back to previously seen levels. • In Q4 2021, the mean Loan-to-Value (LTV) ratio on new mortgages to first-time buyers in Scotland stood at 82%, an annual increase of 4.8 percentage points. Meanwhile, the mean LTV ratio for home movers in Scotland stood at 71% in Q4 2021, up 1.4 percentage points on the previous year (Source: UK Finance). • Analysis of Bank of Income data on lending multiples reveals that for buyers on a single income, the most consistent lending multiple is 4.0 or over in 2021 (the highest in the 7 year period of data). For joint income borrowers, the most consistent LTV income multiple is 3 or over, representing 43% of all loans in Q4 of 2021. As the affordability calculation in the HNDA Toolkit uses a default LTI of 3.2 this analysis suggests there is no strong case to change this with 3.00 or over LTI (joint income) being the most recurring lending multiplier between 2015 and 2021. • **Home Ownership:** Dundee had the smallest increase in the volume of house sales between 2008 and 2020 at 7.4%. The median house sales value in Dundee (£145,942) was the lowest of all Tayside areas. In Dundee, 45% of households cannot afford a lower quartile market home. Households would need to spend 4.53 times the average local income to afford the average house price – a factor in excess of the typical 3.9 multiplier. • **Private Renting:** The Local Housing Allowance across Dundee (£571) averages at 30% less than the costs of market rents (£744)

5 Core Output 2: Estimating Future Housing Need and Demand

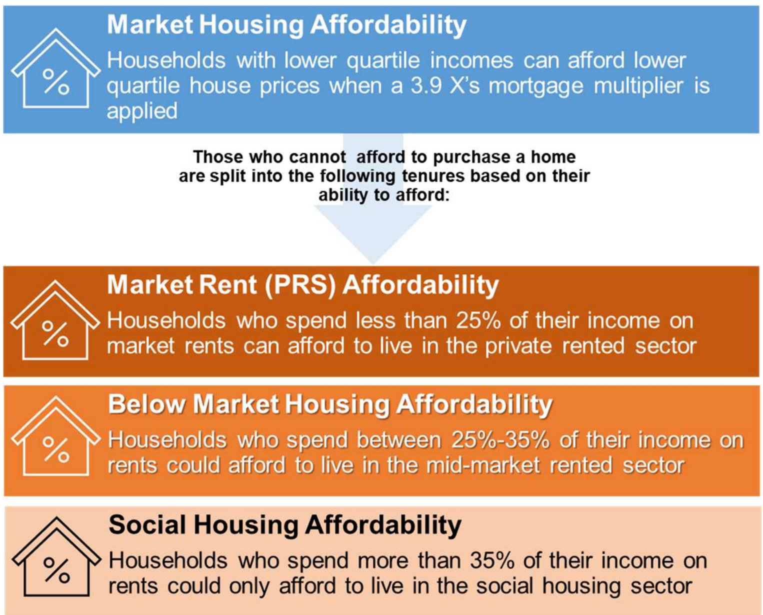
Chapter 5 explains how Dundee City Council has estimated the number of new homes that are likely to be required over the next 20 years to meet local need and demand. These housing estimates are then disaggregated by tenure, based primarily on a household's ability to afford:

- Market housing (owner occupation)
- Market rents (the PRS)
- Below market housing (a range of subsidised intermediate housing tenures including mid-market rent, shared equity/ownership and other forms of low cost home ownership)
- Social housing rents.

Estimates are based on the outputs of the HNDA Tool, which has been developed by the Scottish Government's Centre for Housing Market Analysis (CHMA). The tool is an Excel-based platform intended to produce broad, long-term measures of future housing need rather than precise estimates.

The Scottish Government's HNDA calculation tool is prepopulated with data to estimate the number of new homes needed in the area. The HNDA tool works by projecting the number of new households who will require housing in Dundee City by considering existing households who need new homes PLUS new households who will need homes in the next 20 years.

Partners can adjust the tool using local evidence of housing need and housing pressures.



Underpinning the primary inputs to the tool, which form the basis of the HNDA calculation, is an affordability assessment which splits overall housing estimates into the requirement for different housing tenures.

This calculation works by applying the following assumptions to input data on household incomes and housing costs (including house prices and rental values).

Scenarios on housing affordability can then be developed by varying economic, market and affordability assumptions, which affect the tenure split of housing estimates, but which do not have an impact on the overall estimates. These assumptions include testing scenarios on income growth, income distribution, house prices and market rent inflation.

5.1 Dundee City HNDA Scenarios and Assumptions

Informed by the evidence assembled in Core Output 1: Housing Market Drivers; two HNDA scenarios have been developed providing an upper and lower range of housing estimates across the Dundee area. Tables 5.2 – 5.4 set out the assumptions that underpin each scenario and as a benchmark, the assumptions which offer default settings in the HNDA toolkit. The evidence that has underpinned the selection of each assumption is also detailed:

HNDA Scenario: HNDA Toolkit Default for Tayside		
HNDA Model Input	Assumption	Evidence/justification
Households	Principle household growth	HNDA Toolkit Default Settings
Existing need	HoTOC utilised and affordability filter is off (i.e. all households in existing need to be met by social rent)	
Years to clear existing need	5 years	
Income growth	Moderate real terms growth 2.5%	
Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	
House prices	Trend growth 1.6% per annum	
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	

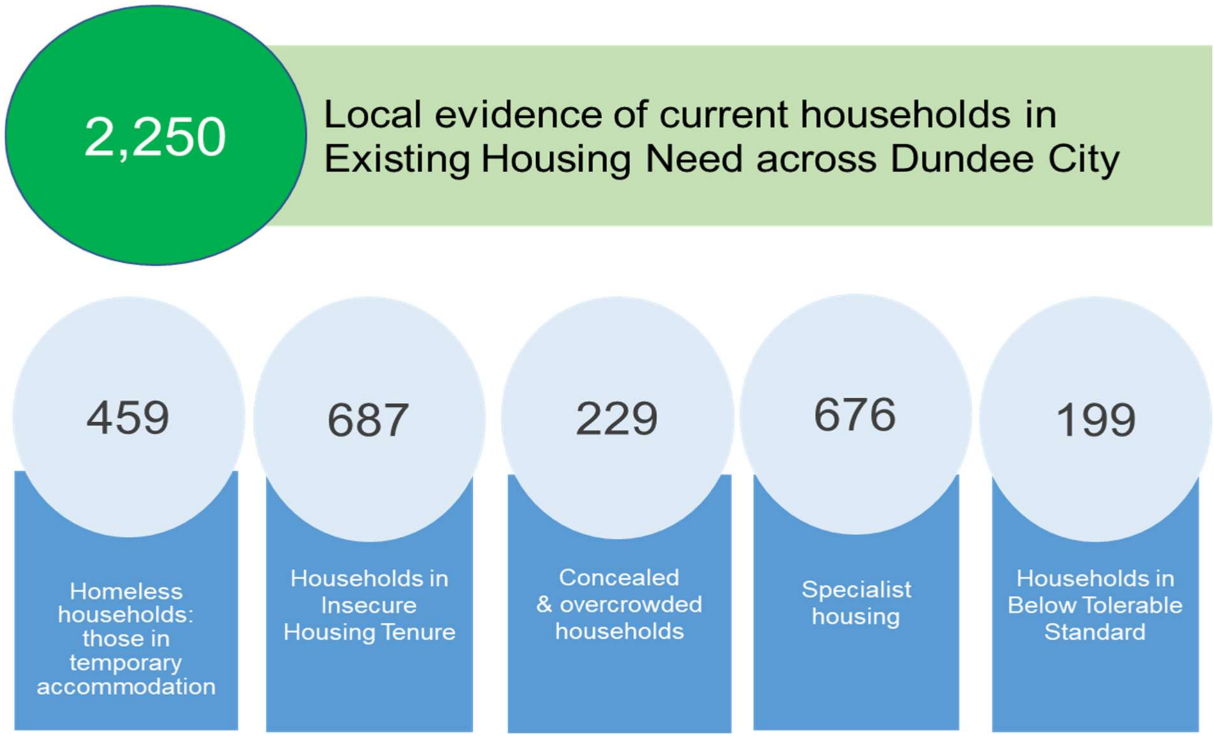
Table 5.2: Dundee HNDA Tool Default Assumptions

		economy via the Tay Cities Deal and associated £400M of investment in jobs and infrastructure.
House prices	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside house prices over the last 10 years has equaled 1.3%
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	Default assumptions selected – despite uncertainty in the economic context for Tayside in 2021, the scale of ambition in Tay Cities Deal should at a minimum hold any worsening of housing induced poverty
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside BRMA rents (excluding St Andrews) over the last 10 years has equaled 2%

Table 5.3: Dundee HNDA Scenario1: Principal

Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	Income distribution stability selected despite evidence of a higher % of Tayside households experiencing financial hardship (13%) in a post Covid environment; given scale of ambition to grow the Tayside economy via the Tay Cities Deal and associated £400M of investment in jobs and infrastructure.
House prices	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside house prices over the last 10 years has equaled 1.3%
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	Default assumptions selected – despite uncertainty in the economic context for Tayside in 2021, the scale of ambition in Tay Cities Deal should at a minimum hold any worsening of housing induced poverty
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside BRMA rents (excluding St Andrews) over the last 10 years has equaled 2%

Table 5.4: Dundee HNDA Scenario 2: High Migration



Each element of existing housing need is evidenced in detail in Appendix A: Core Output 2 Dundee City Databook, with the basis of each measure detailed below:

- Homeless households in temporary accommodation were established using an average of HL1 statistics for 2020/21 detailing the number of households in temporary accommodation on 31st March 2021 and a snapshot of households in temporary accommodation derived from partner temporary accommodation stock lists
- Households in secure tenure were established using an average of respondents to the 2021 Tayside HNDA survey who were 'under immediate threat of eviction, repossession or loss of housing' with 2020/21 HL1 statistics on households who have become homeless as a result of insecure tenure
- Households in the 2021 HNDA survey who identified themselves as overcrowded **OR** sharing amenities with another household with double counting eliminated from total respondent numbers
- Households who need to move due to medical needs or who require specialist housing established through analysis of local housing waiting lists
- Local estimates of poor housing quality using 2021 Tayside HNDA survey outcomes of households in poor quality housing.

Combining these requirements results in a local existing need estimate of 2,250 households across Dundee City who require moving to a new property.

Dundee City HNDA Toolkit New Arising Need Estimate: Principal – High Migration

2,449
- NRS 2018-based Principal Projections
- Projected 3% growth across the Dundee City area

4,060
- NRS 2018-based High Migration Projections
- Projected 6% growth across across the Dundee City area

	2021	2040	20 Year Change	Avg Annual	% Change
2018 Principal	71,077	73,526	2,449	122	3%
2018 High Migration	71,133	75,193	4,060	203	6%

The principal household projections estimate an overall growth in households across the Dundee City region of 3%. These projections create an average annual increase of 122 households in Dundee.

The high migration/growth scenario estimates an overall growth in households across Dundee of 6%. These projections create an average annual increase of 203 households across the City.

5.4 Dundee City Housing Estimates

The Dundee HNDA calculation combines each component of housing need to create a 20-year range of housing estimates as follows:

Dundee HNDA housing estimates range from 4,699 to 6,310 over the next 20 years. The high migration/growth scenario projects a 40% increase in estimated need from the principal scenario. This results in an additional net housing requirement of 81 homes per annum. Table 5.4; sets out the 20 year HNDA projections for Dundee City in 5 year bandings

Dundee	Principal	High Migration
2021-2025	2607	2912
2026-2030	524	937
2031-2035	920	1357
2036-2040	648	1104
Total	**4699**	**6310**
Average per annum	**235**	**316**

Table 5.7: Dundee City HNDA Housing Estimates 2021-2040 (Principal and High Migration/Growth Scenarios)

5.5 Housing Estimates by Housing Tenure

The HNDA calculation tool applies the housing affordability assumptions outlined above to create housing estimates by tenure. The Dundee HNDA affordability calculation is driven by the same

The 2021 HNDA calculation shows that between 48% - 58% of households in Dundee City will require social housing to meet future housing need, in the region of 2,700 – 3,000 new homes. A further 11% - 14% of households could benefit from below market housing solutions or through the enhanced delivery of market rents (12% - 15%).

The requirement for market housing ranges from 18% - 23% over the next 20 years, in the region of 900 – 1,400 new homes.

5.6 Estimating Housing Need & Demand: Key Issues

LHS & Local Development Plan	Key Issues identified in the HNDA
Future need for additional housing broken down by household who are likely to be able to afford: • owner-occupation • private rent • below market housing • social rent	The Local Housing Strategy and Local Development Plan for Dundee City should set achievable and deliverable Housing Supply Targets based on the housing estimates produced by the 2021 Tayside HNDA calculation, considering deliverability within a regional Tayside context, as well as the local strategic landscape. Between 2021 – 2040 the housing estimates for the Dundee City area, range from: • 4,669 using the principal projection • 6,310 using the high migration projection In the next 5 years (2021-26), the housing estimates for the Tayside area range from: • 2,607 using the principal projection • 2,912 using the high migration projection By tenure, across the Tayside region, it is estimated that: • 48% - 58% of housing estimates will be met by social housing • 11% - 14% of housing estimates will be met by below housing • 12% - 15% will be met by market rented housing • 18% - 23% will be met by market housing The LHS and LDP should consider the need for housing supply targets that extend beyond the duration of the 5-year LHS period by reviewing historic new build completion rates, considering the wider policy and economic context at a regional and local level. Strategic drivers to inform longer term and short term housing and development planning policy decisions using HNDA housing estimates as a starting point, are set out in more detail in Chapter 8, based on the views and perspectives of Dundee City partners and stakeholders.

Accessible, adapted and wheelchair housing	Non-permanent housing	Supported provision	Care & support for independent living	Site provision

Tables 6.1-6.5 detail the policy context, property needs, client groups and specialist housing requirements associated with each category.

6.2 Accessible, Adapted and Wheelchair Evidence

Accessible, adapted and wheelchair housing	
National policies	• **National Planning Framework (NPF4 Position Statement)** • **Scottish Homes (1998) Housing for Varying Needs, A Design Guide** • **Housing to 2040** - Scottish Accessible Homes Standard 2025-26 • **Accessible housing standards** including Scottish Building Standards • **Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations 2020** • **A Fairer Scotland for Disabled People Progress Report** • **Local Housing Strategy Guidance** requirement for an all-tenure wheelchair accessible housing target. • **Still Minding the Step:** Recommends three-tier approach 1) design and supply 2) adaptations 3) effective allocation of wheelchair accessible and adapted homes.
Local policies/strategies	**Strategic Housing Investment Plans:** **Dundee (2019-2024)** Within Dundee City there is a large demand for wheelchair adapted housing, the requirements are considered in every new build social rented development. The size of housing required varies from 1 bed units to 5 bed units, with c.100 people currently on waiting list as at August 2018. Since 2015 there has been 45 new build social rented wheelchair units either completed or currently under construction in the City, there are also a further 137 proposed wheelchair units for future developments identified in this New SHIP 2019 - 24. SHIP Commissioning Targets 2019-2023 equal 10 units per annum.
Property needs	**Accessible Housing** An accessible home is one where the design and layout of the property is free from physical barriers that might limit its suitability for households with disability, mobility or health conditions. It is sufficiently flexible and convenient to meet the existing and changing requirements of most households with an interior fabric that can be adapted to accommodate aids, adaptations or equipment. Across Tayside there are a range of property types that are commonly defined as accessible housing. These include amenity accommodation; ambulant disabled; medium

	disability is Physical Health Problems (24.7%), Mental Ill Health (22.5%) and Learning Disabilities (7%). This benchmark is lower than the Scottish House Condition Survey (2017-19) which estimates that 54% of households in Dundee have a household member with a long term illness or disability. The SHCS also estimates that 46% of households in owner-occupation contain one or more long-term sick or disabled person in comparison to 73% of those living in social housing. 9% of households with long term illness of disability in Dundee are limited by their current property, which is the highest of all Tayside partners. The concentration of flatted accommodation in Dundee aligned to a poorer health and mobility profile are likely to be driving factors in this statistic. Furthermore, 16% of older households contain an individual with a long-term sickness or disability restricted by the property, which is 6% points greater than found across Scotland as a whole. **Specialist Housing** It is estimated that there are 7,085 units of specialist housing provided by social landlords in Tayside, with 15% of all homes offering specialist forms of housing provision. Dundee accounts for a significant 56% of provision across Tayside, with 3,969 specialist homes in the social housing sector. In Dundee, 63% of specialist homes provide housing for older people including sheltered accommodation and 41% of specialist homes provide accessible housing for people with mobility needs. Across all Tayside partner areas, there has been a 8% turnover in specialist housing stock over the last three years. Dundee had 10% turnover over the same period. **Accessible Housing** Dundee has 666 units of accessible housing, which accounts for 3% of the total housing stock in Dundee. Across Tayside partners, Dundee accounts for 42% of all accessible housing provision. 5% of lets within the year 2019-20 were for accessible housing with around 108 accessible homes becoming available to let each year. Households in Dundee reported the most significant percentage of unmet need for accessible housing at 13%, significantly higher than the average for Tayside at 8.1%. Unmet need for accessible housing in Dundee is expressed by over 9,000 households (2021 HNDA Survey). **Adapted Housing** Projecting future adaptation requirements is challenging due to the changing demographics across Dundee. It is likely the current requirement will increase given there is an ageing population. This means targets in relation to specialist housing and adaptations will require continuous review to understand requirements as population demographics change. Dundee Council will undertake this as part of their Local Housing Strategy development work. In some instances where adaptation is not possible there may be need to identify alternative suitable housing options for such households. SHCS data suggests that 33% of the housing stock in Dundee has been adapted, approximately 71,000 homes. The Scottish House Condition Survey also provides estimates of properties requiring adaptations by local authority area. The majority of adaptations have been in social

	Homeless etc (Scotland) Act 2003 (Commencement No.4) Order 2019 removed local connection enabling presentation by homeless households at any Scottish local authority area of their choice. **Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2020** amendment extends the Unsuitable Accommodation Order to all homeless households meaning that anyone staying in accommodation deemed as 'unsuitable' for more than 7 days will constitute a breach of the Order. At present, this only applies to children and pregnant women in bed and breakfast accommodation. **The Homelessness & Rough Sleeping Action Group (HARSAG)** was set up by the Scottish Government to produce solutions to end homelessness and rough sleeping with a move towards a Rapid Rehousing approach. A requirement was placed on local authorities to produce 'Rapid Rehousing Transition Plans' (RRTP) with significant implications on the management and availability of non-permanent housing. **Ending Homelessness Together Action Plan** **Migrant Workers -** Non-EEA nationals may apply to work or train in the UK under a number of different schemes and categories. Some categories require the worker to obtain an Immigration Employment Document (IED), for example the Work Permits and Sectors Based Schemes, while others such as Fresh Talent Working In Scotland do not. Where an IED is required, this does not entitle the holder to enter or remain in the UK; they must also apply for leave separately, either as an Entry Clearance if outside the UK or Leave to Remain if already in the UK. **Armed Forces -** Taking the Strategy Forward (Jan 2020) outlines how Scottish Government will move this agenda forward and achieve the best possible outcomes for veterans now and in the future. A refreshed action plan was launched in August 2022 along with commitments to provide annual progress reports. The 'Welcome to Scotland' Guide published in 2022 provides advice for service personnel and their families in relation to housing, education, and healthcare in Scotland. Legislation in relation to armed forces personnel can be found in Armed Forces Act 2021 and Housing legislation. **Housing to 2040 reflects the 2020-21 Programme for Government which states that the Scottish Government will undertake a review of purpose-built student accommodation** which will help inform changes in the sector alongside the wider Rented Sector Strategy.
Local policies/ strategies	**Local Housing Strategies and Rapid Rehousing Transition Plans** **RRTPs** Rapid Rehousing Transition Plans outline how each local authority approaches providing a settled, mainstream housing outcome as quickly as possible through minimising the time spent in any form of temporary accommodation, with fewer transitions and how local authorities will move to use of mainstream furnished temporary accommodation within a local community. **Dundee City RRTP**

	This is usually delivered via the acquisition or reconfiguration of existing stock; however, the development of new build units can also be an also option, particularly for specific client or economic groups e.g. key workers or students. Provision can include temporary accommodation, specialist provision for homeless households, serviced accommodation, key/seasonal worker housing, student accommodation and housing for armed forces personnel.
Suitable for	Care leavers Homeless households Individuals leaving prison or institutional settings such as hospital Those with experience of criminal justice system Households experiencing domestic abuse Migrant/seasonal workers Refugee and asylum seekers Young People Students Armed Forces Veterans
Evidence	**Temporary Accommodation for Homeless Households** Dundee City has 309 units of temporary accommodation comprising 35% of the Tayside Total. Around 30% of households in temporary accommodation stay in self-contained accommodation within the community, which is a much lower proportion than the Tayside average (58%). Greater use of hostels (31%) and supported accommodation (32%) is evident than elsewhere in the region. Dundee city has the highest proportion of homeless assessment decisions where contact has been lost prior to assessment decision of all Tayside partner areas at 9%. The rate of households in temporary accommodation in Dundee City as of 31/03/2021 is 3.6 per 1000 population, the highest of all Tayside partner areas. Dundee City has an average total time in days spent in temporary accommodation in 2020/21 at 161 days. This is lower than the Scottish average at 199 days. **Student Accommodation** The Scottish Household Survey 2020 indicates that there were 5,013 full-time students aged 18-74 in employment in Dundee, with 1,710 unemployed. There are a higher proportions of full-time students living in the private rented sector than any other housing tenure. The adopted Dundee Local Development Plan 2019 sets out (in Policy 15: Student Accommodation) that over the past ten years there was comprehensive development of new and replacement purpose-built student accommodation within the City and that it is considered unlikely that there will be the need over the short to medium term for any significant additions to the supply of purpose-built accommodation for students. In the last 3 years since the adoption of the Local Development Plan 2019 there has been an increase in developer interest for purpose-built student accommodation and this has

6.4 Supported Provision Evidence

Supported Provision	
National policies	**Shared Spaces was commissioned by Homeless Network Scotland** to explore permanent and non-permanent provision for individuals experiencing homelessness with multiple and complex needs. There is recognition that some individuals may benefit from shared and supportive provision. **Building Better Care Homes for Adults Guidance by the Care Inspectorate** illustrates what good building design looks like for care homes for adults post-Covid. It promotes self-contained small group living settings. **Independent Review of Adult Social Care offers** recommended improvements to the adult social care system in Scotland and recommends that the safety and quality of homes must improve with more joint working between services to ensure support is provided to enable people to stay in their homes and communities.
Local policies/ strategies	**Housing Contribution Statements:** Housing Contribution Statements (HCS) were introduced in 2013 and provided an initial link between the strategic planning process in housing at a local level and that of health & social care. At that time the HCS had a specific focus on older people and most Local Authorities based their initial HCS on their existing Local Housing Strategy. With the establishment of Integration Authorities and localities, Housing Contribution Statements **now become an integral part of the Strategic Commissioning Plan** and have been expanded and strengthened to consider the role of supported housing provision in enabling key client groups to live well in the community they choose. **Dundee:** The Dundee HSCP Housing Contribution Statement sets out how the local housing sector will actively work with the Partnership to support delivery of the outcomes within the Strategic Commissioning Plan. This will include achievement of the following outcomes: • Communities, families and individuals, including carers, will thrive in the areas they live in. • People, including carers, will be happier living in rejuvenated localities with better quality, safer and more energy efficient housing. • More people with health conditions or disabilities will receive care and/or supports in their own home or homely setting and their accommodation will provide the best possible environment to support their care from carers and the Health and Social Care workforce. • Fewer people will spend time in temporary accommodation and when this is necessary only for short periods. • Housing and homeless advice/ information will be easily accessible in localities and available closer to home
Property needs	In assessing the need for supported accommodation, as well as considering the future requirements associated with housing for older people, the HNDA guidance should also consider the provision of care homes and residential homes for this client group. Future requirements for accommodation based

	• Third Sector support and advocacy services • Nursing staff • Social work support staff • Care/Home care workers offering personal care • Warden, kitchen and cleaning staff
Suitable for	Households with high support and care needs, including • Frailty • Dementia • Long-term illness, disease or condition • Mental health conditions • Physical disability • Learning disabilities • Neurological disorder • Developmental disorder • Drug/alcohol dependency • Multiple complex needs
Evidence	**Care Homes** In 2017, Dundee City had 44 registered places in care homes for older people per 1000 population, which represents an increase of 2.5 places per 1000 population since 2007. Furthermore, there were 34 care homes in Dundee City in 2017 which represents a 3% reduction between 2007 and 2017. Dundee City had 1,098 residents in care homes in 2017, representing an 8% increase from 2007. At this time care home occupancy rates were 87%. **Housing for Older People** There are 2,953 units of housing for older people in Dundee, 15% of the total social housing stock and 74% of all specialist housing in the Tayside area. In Dundee, there are 885 waiting list applications for housing for older people amounting to 12% of all applications. This equates to 3.19 applications for every available tenancy. **Supported accommodation for key client groups** There are 79 supported tenancies provided by social housing providers across Dundee, which account for 0.4% of the total housing stock in the area. There are 296 waiting list applications for supported housing. Over and above this, there are 211 units of supported housing in Dundee City (HSCP commissioned tenancies) all of which are for households with learning disabilities. In the absence of data on future need for accommodation with support, Dundee City Council estimate there is a further requirement for 211 HSCP commissioned tenancies. Defining supported accommodation needs for all client groups in Dundee is a priority for the HSCP. **Supported accommodation for homeless households** Dundee City RRTP indicates that 2% of homeless households 2018 and 2019 had a requirement for residential/supported accommodation with future

	the Housing Options Hubs across Scotland rather than to shift focus and resources from prevention to dealing with the crisis of homelessness. Local authority staff are already providing housing support and advice to applicants through homelessness prevention activity. **Care and Repair Scotland, Good Practice Guide** highlights the standards expected during the management and delivery of Care and Repairs services throughout Scotland.
Local policies/strategies	**Dundee** Dundee's Strategic Commissioning Plan focuses on moving resources from hospitals to community-based care. It aims to achieve this by delivering four strategic priorities which include: Health Inequalities, Early Intervention and Prevention, Locality Working and Engaging Communities and Models of Support (Pathways of Care). There are some areas within each priority where housing's contribution will assist in delivering improved outcomes, such as enabling people to live more independently at home for longer and improving digital technology. The HSCP feel success will look like communities and individuals who thrive in the areas they live in.
Property needs Care & support needs	The delivery of preventative housing solutions which enable households to live independently in the communities they prefer, reflects the policy shift away from institutional settings and congregate environments in Scotland, towards the delivery of practical care, support and assistance personalised to each individual. Individuals may require care and support at different points in their life, or not at all. There are a wide range of relevant care and support services available across Tayside to enable residents to live independently in their own housing setting. These are services generally unconnected with the forms of specialist housing outlined in previous templates. These services will include: • Property related interventions or assistance such as: o Mobility aids and equipment o Property adaptations o Small repairs services including handypersons o Care & Repair services including support to manage repair, maintenance or improvement works o Telecare/Telehealth and community alarms • Care and support interventions or services such as: o Self-directed support o Home care workers o Specialist support workers o Carers o Social workers o Welfare Rights Advisors o Housing/tenancy support workers
Suitable for	Households who require some form of support or care service to enable independent living at home could include:

	is well in excess of the number of households in Dundee receiving homecare services (1,570 households). **Self-directed support** Public Health Scotland, Social Care Insights Dashboard indicates that in 2018/19 there were 7,495 households opting for Option 3 Self-Directed Support in Dundee. The number of people choosing SDS has been increasing year on year since 2007. Key findings supporting the evidence on care and support for independent living is provided in Appendix L Specialist Provision Databook
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for support to enable independent living across Dundee. This work is taken forward by the Housing Market Partnership in the Dundee area, to support the development and implementation of the Housing Contribution Statement. This work includes consultation, engagement and data-sharing to assess the needs of those who require independent living support. Key findings supporting the evidence on support for independent living is provided in Appendix L Specialist Provision Databook.

Table 6.4: Care & Support for Independent Living Requirements

6.6 Specialist/Site Provision Evidence

Site Provision	
National policies/strategies	**Gypsy/Travellers and Care** published in 2021 by the Equal Opportunities Committee (EOC) sets out that Gypsy/Travellers do not enjoy the benefits of universal health care. **Scottish Government (2020) Gypsy/Traveller accommodation needs: evidence review** **Improving Gypsy/Traveller Sites: Guidance on minimum site standards and site tenants' core rights** Thematic Report on Gypsy/Traveller Sites commissioned by the Scottish Housing Regulator **'Improving the Lives of Scotland's Gypsy/Travellers'** (2019) **The Planning Act (Scotland) 2019** sets out the need for planning authorities to embed stronger engagement with Gypsy/Travellers in local development planning as a statutory requirement. **Equality and Human Right's Commission's report Developing Successful Site Provision for Scotland's Gypsy/Traveller Communities** **Scottish Government (2019) Improving the Lives of Gypsy Traveller: 2019-21** **Scottish Government (2019) Gypsy/Traveller Sites in Scotland** **Scottish Government (2020) Gypsy/Travellers-accommodation needs: evidence review** **Housing to 2040** made a commitment to make available up to £20 million over five years for more and better Gypsy/Traveller accommodation from 2021-22

	In 2021/22, there were 3 roadside encampments in Dundee. At present, there is no waiting list for the site at Balmuir Wood which has capacity for 14 pitches, 6 of which are double and 8 single. Occupancy over the past year has been approximately 25%. The most recent roadside encampment had 13 caravans and was sited at Balmuir Wood. The encampment included approx. 20 adults and 16 children. Prior to this there were two encampments in July at Riverside with around 7 caravans at each and an estimate of 15 adults and 10 children at each encampment. Only 47% of council sites for Gypsy/Travellers and Travelling Showpeople in Dundee were occupied in 2016, with 17 households leaving on average annually. Dundee has the highest rate of turnover on Gypsy/Traveller sites of all Tayplan areas with an average of 89% of households living on the site vacating each year. Weekly Pitch Rent in Dundee is approximately £10 cheaper than the average rent on a 2 bed council property at £62.53. The 2016 Tayplan study included a Housing Need & Demand Calculation specifically for the Gypsy/Traveller population. It concluded that over a 5 year period (taking into account existing and newly emerging need) in Dundee, there is anticipated to be a 55 to 65 surplus in Gypsy/Traveller site pitches across the next 5 years. **Travelling Showpeople** The 2019-24 LHS notes there is no resident community of Travelling Showpeople with research carried out in 2016 indicating there was no evidence this group would consider relocation to Dundee. Key findings supporting the evidence on site provision is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Tayside region. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis.

Table 6.5: Tayside Site Provision Requirements

6.7 Core Output 3: Key Issues – Dundee City

The assembly of Core Output 3 of the HNDA has provided Dundee Housing Market Partners with a clear, evidence-based understanding of:

- future property requirements associated with specialist housing provision including accessible and adapted housing, wheelchair housing and non-permanent accommodation for key client groups
- future care and support requirements to enable independent living including supported housing for key client groups, plus housing support and homecare services

	• **Care/support services for independent living:** In Dundee the proportion of households receiving care services is double the Scottish figure (7%) at 15%. In Dundee, those households residing in social housing (27%) are more likely to be in receipt of care services than any other tenure (owner occupied 11%). The total number of homecare clients in Dundee is 1,910 with a total of 20,200 hours of care provided, which amounts to around 11 hours of care per client on average. The top 3 social care services received by clients in Dundee are social worker (34%), Community Alarm/Telecare (24%) and Self-Directed Support (21%). • Almost 6,000 households across Dundee are supported to live independently as a result of using assistive technology (Telecare). 74% of telecare clients across Dundee are not currently receiving a homecare service.
Locational or land needs	• In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Dundee City area. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis. Key findings from the 2016-21 study for the Dundee City area are as follows: • **Site provision:** In 2016, 60% (125) of the Gypsy/Travellers and Travelling Showpeople in Dundee were residing in settled accommodation. Dundee has one Council site with a capacity of 19 pitches. In 2016, only 47% of council sites for Gypsy/Travellers and Travelling Showpeople in Dundee were occupied with 17 households leaving on average annually. • Dundee has the highest rate of turnover in site pitches of all Tayside areas with an average of 89% of households living on the site vacating each year. Weekly Pitch Rents in Dundee are approximately £10 cheaper than the average rent on a 2 bed council property at £62.53. • In Dundee, there was projected to be a 55 to 65 **surplus** in Gypsy/Traveller site pitches across the next 5 years as identified in the 2016 Gypsy/Traveller HNDA study

Table 6.6: 2021 Dundee City HNDA Key Issues -Core Output 3 Specialist Housing Provision

Supported housing	• It is estimated that roughly 4,000 households across Dundee may require housing for older people • 17% of the annual homeless population in Dundee (1,400) have complex support needs and may benefit from Housing First tenancies (240 Housing First tenancies) • 2% of the annual homeless population in Dundee (1,400) is estimated to require housing with support (28 supported tenancies) • There is a need for 210 commissioned tenancies/spaces for key care groups.	• 2021 Tayside HNDA survey • Local evidence

It should be noted that estimates arising from the Tayside HNDA household survey provide a self-assessment measure of requirements for specialist housing provision. Whilst this insight offers a helpful, cross tenure estimate of existing households who require specialist housing, further validation will be required to determine the both the extent of assessed need for specialist housing and the potential role that in-situ solutions could perform in meeting housing need.

Future Housing First and supported accommodation needs for homeless households should also be carefully assessed as temporary accommodation provision is reshaped through the delivery of the Rapid Rehousing Transition Plan. There are also gaps in insight associated with estimated requirements for future provision around care and support services for independent living.

Furthermore, whilst the most recent insight suggests that there is a surplus of provision in site provision for gypsy travellers in Dundee, the need to update this analysis is acknowledged aligned to the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the ‘More and Better Accommodation’ element of the Gypsy/Traveller Action Plan in 2022).

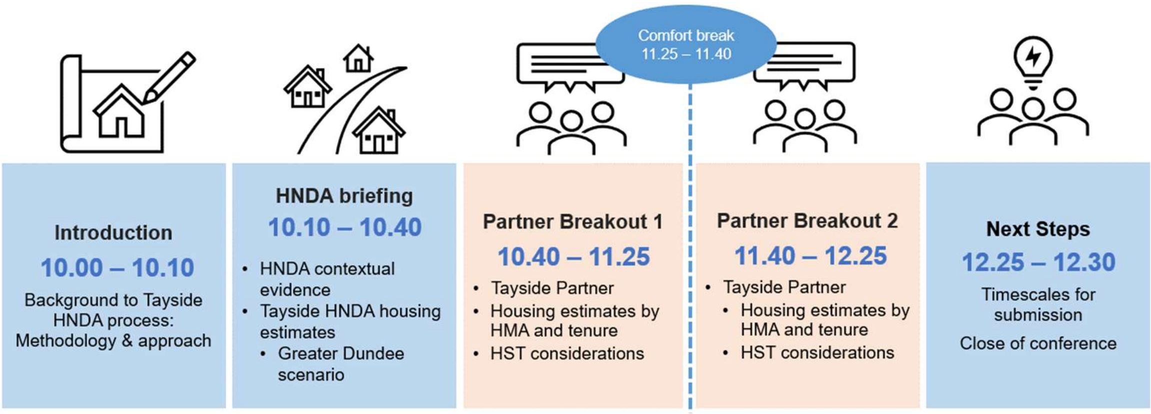
Tayside partners are committed to using the evidence provided in HNDA Core Output 3 as starting point to robustly evidence future requirements for each form of specialist provision within the development and delivery of their future Local Housing Strategies.

Dundee HNDA: Core Output 4: Housing Stock Profile & Pressures	
LHS & Development Plan	Key Issues identified in the HNDA
Housing (condition) quality	• **Occupation profile**: In Dundee, 4% of dwellings are vacant as of September 2019, which is greater than the national picture (3%). In addition, Dundee makes up the largest proportion, (30%) of the vacant dwellings in the Tayside region. 71% of the dwellings with occupied exemptions across Tayside are found in Dundee. 8% of dwellings in Dundee have occupied exemptions, higher than any other Tayside area. In Dundee the proportion of dwellings with a single adult discount is greater than all other partner areas at 44%. • **Tenure profile**: According to the HNDA Survey outcomes, 50% of households owned their property in the Dundee area, the lowest proportion of all Tayside partners. This is broadly in line with other data sources such as 2011 census (50%), 2019 Scottish Government Housing Statistics (45%) and 2017-19 Scottish House Condition survey (46%). Dundee has a higher percentage of private renting (survey - 15%) than the Scottish

	• **Property condition:** 1% of dwellings in Dundee are considered to be Below the Tolerable Standard (BTS). Over one third (35% of dwellings in Dundee are in urgent disrepair and almost half (48%) of pre 1945 dwellings have evidence of urgent disrepair, the highest proportion of all Tayside partners. Almost 9 in 10 (88%) of Dundee's dwelling have evidence of disrepair, the highest of all Tayside partners and 17% higher than the Scottish average (71%). Dwellings with evidence of condensation in Dundee (16%) is double the rate of the Scottish average (8%). • 31% of properties within Dundee experience some form of fuel poverty, the highest of all Tayside partners and greater than the Scottish average (24%). Tenants in social (41%) or private rented accommodation (42%) and twice as likely to be fuel poor than owner occupied properties (20%). • Across Dundee social rented stock, 97% of properties met SHQS and 89% of properties met EESSH as of March 2021.
Housing stock pressures	• **Stock pressures**: As per CHMA estimates 2% of Dundee households are overcrowded but there are no concealed households in Dundee. The majority of respondents to the HNDA Survey stated that they do not share household amenities with anyone (94%) or have overcrowding issues (80%). However around 12,200 said they had one or two fewer bedrooms than needed compared to around 6,800 who had one or two too many bedrooms. • On average 10% of social rented properties with Dundee have turned over in the last three years. Across Dundee there are 7,499 waiting list applicants, which equates to 3.68 applicants to every available property. The main reason for housing applications in Dundee is applicants with a medical condition who require alternative housing. • **Future Supply:** The projected SHIP completions between 2021 and 2026 are estimated at 1,295 across Dundee. The 5 year effective land supply per the Dundee LDP equates to 3,392 units. The total historic house completions over 2010-19 varies depending on source with MATLHR data estimating 2,377 for Dundee and local data estimating a higher figure at 3,003. • 128 demolitions are programmed in the Dundee area. • **In-situ solutions**: Dundee has the highest level of older households living in dwellings with adaptations across Tayside at 39%. Of the HNDA survey respondents, Dundee had the highest proportion of homes with property adaptations at 39%. In Dundee, the most common adaptation fitted is handrails at 28.3%. Dundee's average landlord time to complete adaptations is 15 days, the highest of all Tayside partners. Dundee City Council fund 100% of adaptations through their own provisions whereas RSLs in the area fund 7% of their total adaptations spend with the remainder being grant funded.

	dwellings are long-term empty homes. Investing in long term empty properties not only increases the supply of local housing but improves condition of housing stock and helps to regenerate communities. Continued investment in bringing empty homes back into use could make a positive contribution to meeting housing across Dundee. • **Second homes and holidays lets:** Options for future policy around the 365 second homes in Dundee could also be considered by partners aligned to new powers to license regulate and control short terms lets in areas of identified housing pressure
Sustaining Communities	• **Support for Private Owners:** The Council promotes and encourages best use of existing private sector stock via a range of empty home initiatives (including advice and assistance; loan and grant funding) to bring these homes back into use. Properties in poor condition also remain a focus, ensuring owners are assisted to help their properties meet the tolerable standard and are in a habitable condition contributing to the supply of effective housing stock. • **Strategic Investment:** The Council will consider the purchase of suitable, open-market properties to meet the City's general social housing needs, which includes the housing requirements of extended families, and people with particular needs. This option will also be considered in the delivery of Dundee's Rapid Rehousing Transition Plan. • **Utilising existing stock differently:** The Council actively contributes to sustaining local communities via improving and increasing local stock, whether this be wholesale regeneration, stock restructuring or building acquisition and repurposing. • **Tenure Diversification (including demand for intermediate housing):** The Council actively seeks to improve the structure of local housing markets through the (assisted) provision of intermediate housing products, e.g. mid-market rent; shared equity; & low cost home ownership options. • **Regeneration Proposals Deal:** Dundee City Council is accelerating the preparation of a long-term City Centre Strategic Investment Plan (CCSIP). This plan will identify opportunities for housing development within the City Centre. As such, we will prioritise development opportunities for the Affordable Housing Investment Plan in future years.

Table 7.1: 2021 Dundee City HNDA Key Issues - Core Output 2 Housing Stock Profile and Pressures



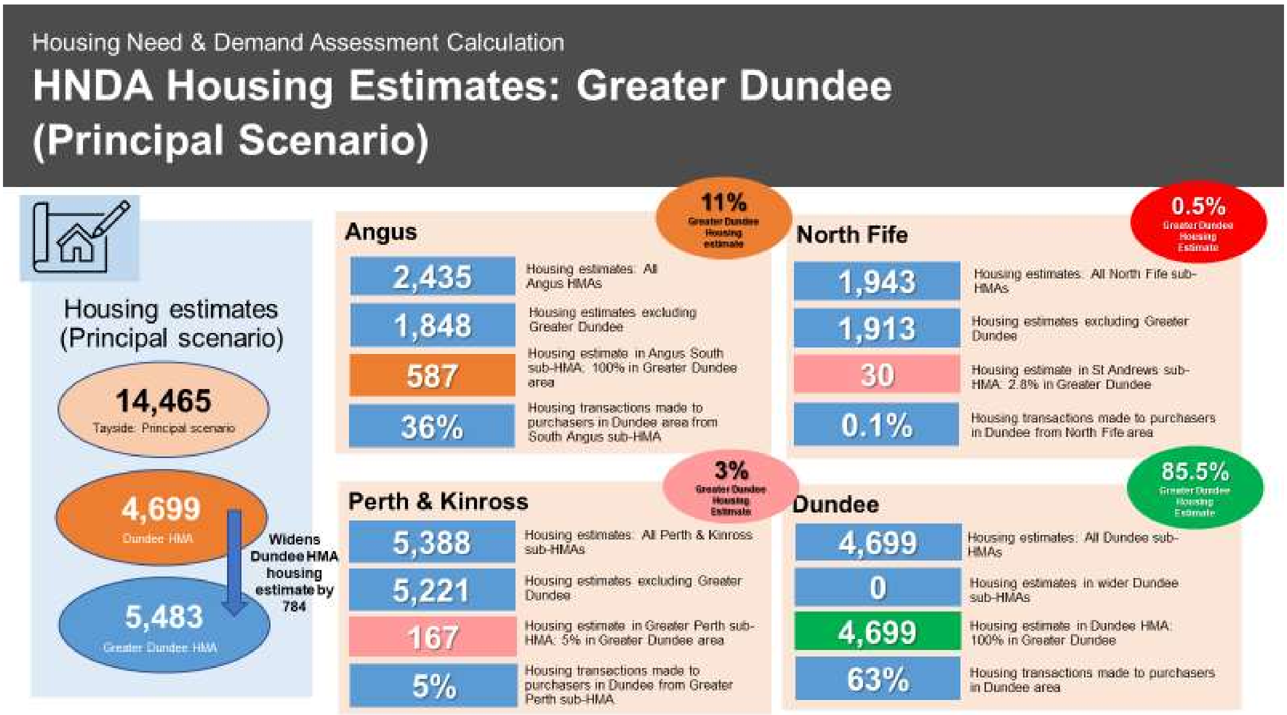
Delegates were presented with background information on the Tayside HNDA process including the methodology and approach. Following this, stakeholders received a detailed presentation on the inputs and assumptions that inform HNDA calculations, as well as an overview of the HNDA evidence base on housing market drivers including demographics, the economy, housing profile, housing pressures and housing affordability. The headline outcomes of the 2021 HNDA household survey were also presented.

A total of 24 partners from 12 stakeholder organisations attended the Dundee City Council sessions, including representatives from the following organisations:

- Abertay HA
- Angus HA
- Angus Council
- Campion Homes
- DJ Laing Homes Limited
- Dundee City Council
- Fife Council
- Frontline Fife
- Hillcrest Homes
- Homes for Scotland
- Ogilvie Homes
- Persimmon Homes
- Perth & Kinross Council
- Sanctuary Housing
- Stewart Milne.

The objectives for the breakout session were to:

- share and discuss housing estimates for Dundee by sub market area
- share and discuss housing estimates for Dundee by tenure
- discuss further considerations that should be taken into account when using housing estimates to inform housing supply targets in Dundee.



The following questions were posed to stakeholders to encourage scrutiny and stimulate debate:

Do the proposed housing estimates for the **Dundee HMA** OR the **Greater Dundee HMA** provide a sound basis for setting Housing Supply Targets?

If yes, why is this the case? If not, why not?

Given that the Dundee Housing Market is not split into a series of sub-areas, stakeholders firstly reflected on whether the overall housing estimates for the City offered a reasonable starting point for housing and land use policy.

Generally, stakeholders were satisfied that housing estimates in the range of 4,700 – 6,300 offered a good starting point for setting future Housing Supply Targets. The estimates benchmark well to the equivalent 10-year MATHLR estimates set for NPF4 (5,200) and also compare well to historic completion rates (between 3,000 – 4,000 per decade). It was suggested however, that housing estimates should focus on future vision and NOT on historic delivery, particularly when housing completions in Dundee have been constrained by the volume of brownfield sites in the land supply.

"The estimates are comparable to previous completions but we need to think about future NOT historic delivery. We need to address the infrastructure constraints on available sites as this is restricting current delivery and will be distorting historic figures".

Stakeholders also agreed that a breakdown of housing estimates into sub-areas of the City would be helpful in guiding delivery planning, ensuring that planners and developers create the capacity to build the profile of housing most capable of meeting current and future need. Because of the focus on brownfield development in the City, it has encouraged a delivery profile which is denser and more flatted than elsewhere. As result, stakeholders agreed there was a need to disaggregate the extent and nature of housing need across different parts of the City to ensure that developers build homes and create places that are diverse and sustainable by tenure, house type and property size.

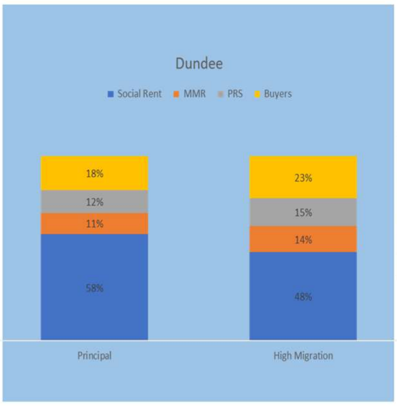
"We really need to understand the dynamics of what's needed in different parts of the City".

8.3 Housing Estimates by Tenure: Consultation Feedback

The following HNDA calculation outcomes detailing housing estimates by tenure were shared with stakeholders:

Tayside Housing Need & Demand Assessment Calculation

Dundee City Housing Estimates by Tenure



Dundee	Principal	High Migration	Principal	High Migration
Social Rent	2,718	3,028	58%	48%
MMR	535	887	11%	14%
PRS	579	958	12%	15%
Buyers	868	1,437	18%	23%
Total	**4,699**	**6,310**	100%	100%

The following questions were posed to stakeholders to encourage scrutiny and stimulate debate:

Do the proposed housing estimates for Dundee City **by tenure** provide a sound basis for setting Housing Supply Targets?

If yes, why is this the case? If not, why not?

Stakeholders considered the tenure profile associated with housing estimates and agreed that the disproportionally high requirement for social housing feels accurate[2].

"I'm not surprised at these figures - this is the nature of the Dundee. The City has been trying to redress the tenure balance for a long time"

Stakeholders also agreed that improving housing quality and affordability was central to the City's ambition to tackle poverty and continue the pace of economic regeneration activity achieved in recent years. Housing-led regeneration driven by investment in social housing offers a delivery framework for ongoing change.

Whilst stakeholders were satisfied that the HNDA methodology has been applied accurately and that tenure estimates were credible based on the Scottish Government's toolkit, questions over the deliverability of the outcomes by tenure dominated the debate.

"You have to question whether delivering these housing estimates by tenure offers a realistic starting point for future policy? Will we have the funding available to deliver the scale of social housing estimated? Does the PRS in Dundee really have the capacity to grow and absorb the need for market rent housing? Delivery factors need to be carefully considered in making policy judgements around housing supply and land allocation".

[2] (Dundee requires 50-60% of future homes to deliver social housing sector whilst in Tayside 40-50% is required)

“Are we being ambitious? If John Alexander was speaking in this group he would say no! We're in the midst of a very ambitious programme for change in Dundee and we need a housing delivery strategy that is equally ambitious – one that looks forward not plans for what we've achieved in the past”.

“We're in the midst of a programme of change in Dundee - as a starting point we need to remember this ambition in our policy decisions”.

“Yes, we need to reflect the wider ambition for Dundee BUT we also need to be realistic, we need to make sure our policy decision are informed by a good understanding of the housing market drivers in a post Covid housing system and in the changing delivery context that NPF4 sets”.

There was strong stakeholder consensus that Dundee is in the midst of a programme of change and in using housing estimates as a starting point for LHS and LDP policy decisions, we need to remember that target ambition for the City. However, stakeholders agreed that within this ambition, policies must prioritise building the right profile of housing to meet local need by sub-area, property type and by tenure. To achieve this, it’s crucial the plan-led system aligns housing delivery to investment in economic and social infrastructure.

“Having ambition is important as the City is changing. We need a clear housing focus within a mixed use city centre strategy. To do this, we think about investment in both social and economic infrastructure”

“Yes, we should aim to be ambitious and this is a good point to take stock when there's been such structural change in the housing system. But ambitions need to be balanced with deliverability concerns and we need the right social and economic infrastructure to really make this work. As well as housing we need to think about schools, green spaces etc”.

Finally, it was suggested that given the constraints associated with the Dundee land supply, we should aim for housing estimates which apply an uplift to give developers more flexibility in bringing forward sites. This approach would ensure that deliverability is not compromised by the constraints of brownfield land.

Whilst opting for a high migration scenario will offer housing estimates which help to address deliverability challenges, an ongoing focus on investing in site infrastructure cannot be forgotten. It was agreed that developing an infrastructure investment plan will need coordination at a regional level and that Tayside partners should work together to engage utility providers and infrastructure planners.

“Deliverability is key - we now need to look at deliverability and infrastructure. The City can't do this on its own. We need to have a wider, regional focus”.