

The logo for Burness Paull, featuring the company name in a white, sans-serif font. A white diagonal line starts from the top left of the letter 'B' and extends downwards to the right, crossing the letter 'P'.

SCOTLAND'S URBAN
A·G·E

Aberdeen, Glasgow & Edinburgh
in the Century of the City

EXECUTIVE SUMMARY



ACKNOWLEDGEMENTS

This research was commissioned to provide decision makers, stakeholders, businesses and practitioners with new insights into Scotland's principal cities and to encourage further discussion on their future roles and prospects.

This document is interested in the nature, character and performance of Aberdeen, Glasgow and Edinburgh individually and as a group of cities in Scotland, their fitness to participate within their immediate city systems (in Scotland, the UK and Europe) and the challenges and opportunities they face. Although some degree of comparison is inevitable, it is not the purpose to rank the individual cities but rather to consider the collective performance of urban Scotland in the knowledge age.

Thanks are due to the Directorate of the Glasgow School of Art, the Heads of Research & Enterprise, the Mackintosh School of Architecture and to the Project Board for the Glasgow Urban Laboratory.

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GLASGOW URBAN LAB THE GLASGOW SCHOOL OF ART

The Glasgow Urban Laboratory is a research group within the Mackintosh School of Architecture at The Glasgow School of Art, working in partnership with the City of Glasgow, the Academy of Urbanism and the United Nations Economic Commission for Europe in Geneva through the UN Charter Centre of Excellence based at the Urban Lab.

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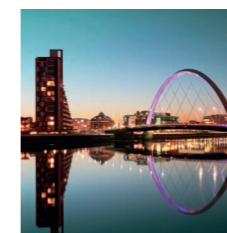
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HOW CAN WE

UNLOCK THE POTENTIAL

OF OUR CITIES IN

THE URBAN AGE?

INTRODUCTION

We are living in the century of the city.

For the first time in human history more people live in cities than the countryside - by 2050 it could be 70% of the global population.

This shift has been driven by a series of distinct trends: ageing populations, low fertility rates, economic migration, automation and digital connectivity.

The result is an irreversible change in the balance of population, both internationally and here in Scotland. But can our cities cope with this decisive switch from rural to urban living? Are they truly fit for purpose?

Scotland's cities face many challenges. None are remotely close to the 'megacity' category like London, Paris or Beijing, that have become epicentres of economic growth in their respective countries. They also lag behind similar-sized cities across Europe against a range

of indicators. Productivity needs to improve, and there must be higher levels of enterprise and innovation. To do so, much more than incremental change is required.

What does that look like in reality though, in terms of both policy and investment? What will it take to unlock the potential of our cities - and what are the risks to our economic and social prospects if the opportunities are not seized?

The available evidence shows that the AGE cities - Aberdeen, Glasgow and Edinburgh - are the key drivers of the Scottish economy. If they are performing well the spin-off benefits to other cities, towns and rural regions are clear. However, these cities

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UNDERSTANDING THE AGE CITIES

1. The three city regions have:



70%

of Scotland's population



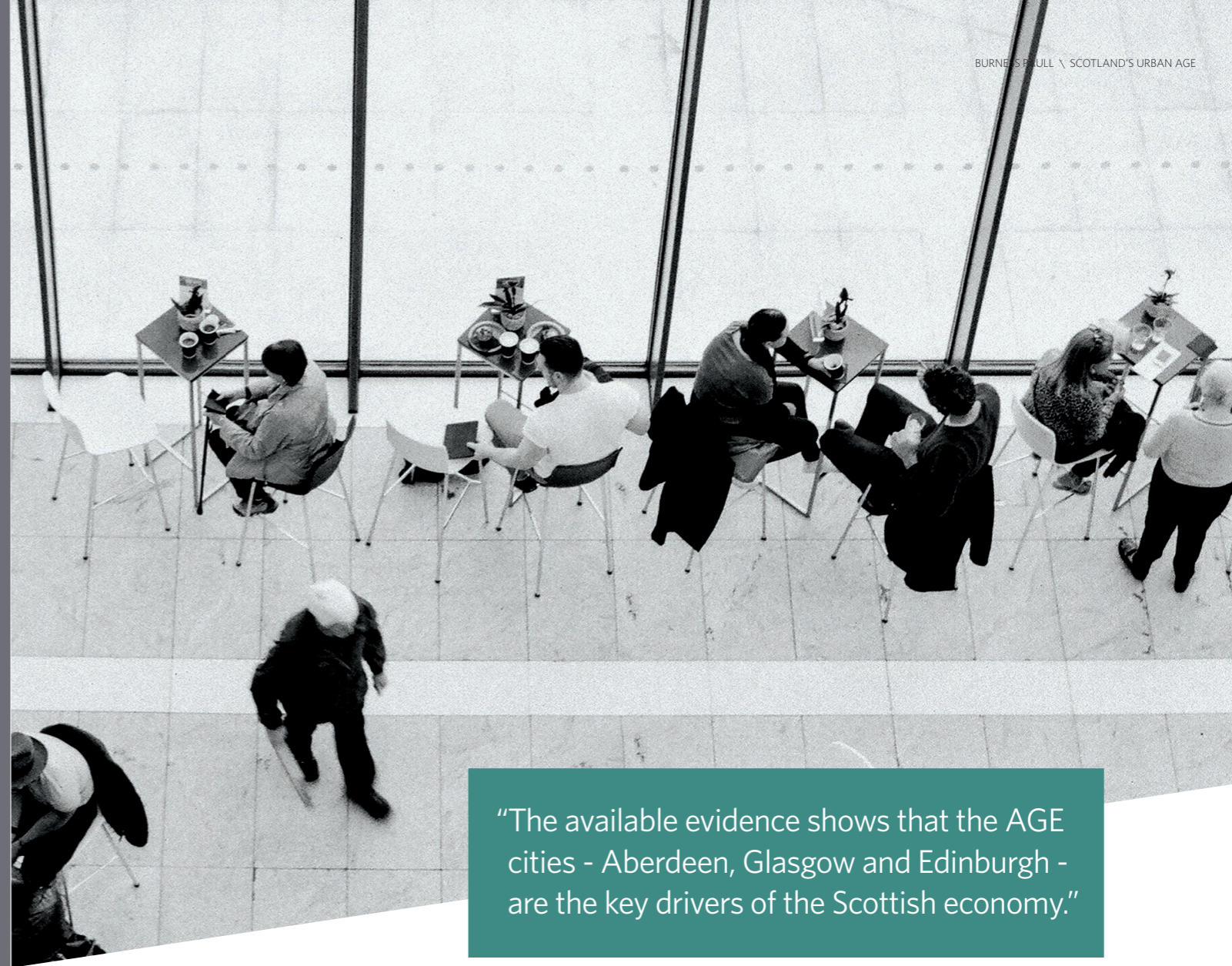
82.5%

of knowledge intensive jobs



75%

of growth sector jobs



“The available evidence shows that the AGE cities - Aberdeen, Glasgow and Edinburgh - are the key drivers of the Scottish economy.”

need to grow their knowledge economies, close the productivity gap and tackle the problems of low skills and low pay. And it is the strength of a city's design, both spatial and intellectual, which ultimately determines how well it can tackle these issues and generate positive growth.

Burnes Paull commissioned the Glasgow Urban Laboratory at the Glasgow School of Art to prepare Scotland's Urban Age in order to examine the roles and potential of the AGE cities in securing Scotland's future economic success.

It takes the pulse of those similar yet individually distinctive cities: **Aberdeen - the Granite City** with its truly international business links and Scandinavian facing outlook; **Glasgow - the Dear Green Place**, creative, resilient and metropolitan; and **Edinburgh - Athens of the North** - an elegant, competitive European capital.

The report highlights what is working well, what is not, and recommends actions aimed at strengthening these three key cities, so that they can become leading players on the international stage and at the same time drive forward the wider economy within Scotland.

From employment to culture, housing and transport, the research is positioned to inform and also spark discussion around how the private and public sectors, along with empowered local communities, can work together to create a new, sustainable urban agenda that benefits the whole country.

Planning and investment policies need to be driven by people bold in innovation, ambitious for sustainable growth and generous with creativity. We hope Scotland's Urban AGE will inspire you to play your part in the debate and in doing so become a conscious architect, actively contributing to the way your own locality is shaped in the years ahead.

ABERDEEN -

The Granite City



GLASGOW -

The Dear Green Place



EDINBURGH -

Athens of the North



“Lack of connectivity, and relatively high cost, means commuters and employers alike are being penalised and paying with their time.”

PART 1

THE CONNECTED ECONOMY - WHAT CAN WE LEARN FROM THE 'SUPERCITIES'?

Supercities are concentrations of population of economic, research, cultural and knowledge power. They can be clusters of discrete and distinctive cities in a mega-region, interconnected by high-speed travel links. The constituent cities 'borrow scale' from one another, with a tendency towards coalescence and sprawl driven by the presence of a 'mother lode' world city.

All such competitive urban systems are dependent on access to excellent systems of mobility, communications and skilled workers to stimulate economic activity.

Scotland's Central Belt is the most highly interconnected part of the country. However, travel connections between Edinburgh, Glasgow and Aberdeen are still relatively slow and time-consuming, whether by road or rail.

This connectivity weakness comes at a critical time for Aberdeen in particular. The city, which is isolated from the Central Belt due to poor transport, is currently looking to anchor Scotland's role in the international supply chain in certain key markets. The move, which reflects a conscious diversification strategy away from a single commodity market, means connectivity is critical. The missing link between the Central Belt and North East must be tackled as a matter of priority.

Other countries, notably France, have done a great deal to shrink distance and time by investing in advanced infrastructures

to speed up communications and enhance mobility in their urban systems.

For example, a fast rail link from Edinburgh via Glasgow and Belfast to Dublin built in partnership with the Irish Government and Northern Irish Administration - with a Celtic version of the Øresund Bridge in the North Channel (the Straits of Moyle) and with fast links to Aberdeen via Dundee and to Inverness - would be ambitious, visionary and transformative for all concerned.

To realise the full potential of the principal cities a step-change will be required to ramp up the rate of development, champion place-making and urban design throughout the city regions, and invest in a world-leading transport system to promote mobility and reduce car-dependency. That may involve greater devolution of powers to the AGE cities.

A city like Eindhoven - like others in the Netherlands - enjoys a far greater degree of autonomy than any in Scotland. It can establish its own, distinctive vision, develop an

UNDERSTANDING THE AGE CITIES

2. The power of the AGE cities:



Knowledge Intensive Business Services

9.9	22.4	26.3	25.1	16.3
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Growth Sectors

10	17.6	17.8	28.8	25.8
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Employment

7.3	16.4	13.2	33.5	29.6
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Population

4.3	11.3	9.3	43	32.1
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The cities of Aberdeen, Glasgow and Edinburgh account for 25% of the population of Scotland with almost 45% more living in the three city regions and they have a younger age profile than the rest of the country. They contribute a disproportionate share of jobs and output, especially in the Scottish Government's designated growth sectors, knowledge-intensive services and high-productivity, export-orientated sectors.

They are home to most of Scotland's leading universities and colleges, and they account for two-thirds of business R&D expenditure.

agenda for action and use tax raising and other fiscal powers to fund investment and deliver programmes that aid connectivity.

To illustrate the point, the AGE cities' larger and higher order institutional functions are already comparatively successful at attracting new investment and people. Scotland has seven of the UK's 50 top-ranked universities, with the

profile in the UK, Europe and globally in the years ahead?

Edinburgh needs to strengthen its position at the apex of Britain's urban hierarchy; Glasgow needs to translate its urban regeneration into sustained and accelerating growth, completing the transition from an industrial to a knowledge city and spreading the benefits regionally;

"Perhaps the biggest challenge for politicians and policymakers is to trust Aberdeen, Glasgow and Edinburgh to take control of their own destiny."

AGE cities taking the 28th, 10th and 6th spots. Institutional uses of the graduate population - such as education and healthcare - are critical services and part of the AGE cities' competitive advantage. However, the ripple effect of that investment is currently too constrained to the cities' limits.

The regional towns framing the AGE cities suffer from a combination of contracting public services and private sector dis-investment, creating a continual regeneration challenge. Major improvements to connectivity links, both physical and virtual, would be a key step in resolving these issues and ensuring the benefits can be spread out to adjoining areas more quickly and more evenly.

Each city has strengths and weaknesses, but what will be required to ensure each can maximise its potential and contribute to improving Scotland's competitive urban

and Aberdeen needs to safeguard its recent economic and productivity performance by making an economic and cultural transition that could, without care and action, be as painful as that of Glasgow.

Therefore, Scotland needs a dedicated urban policy that recognises the special status and influence of Aberdeen, Glasgow and Edinburgh. Increasing the three cities' capacity to adapt, innovate and deliver will inevitably raise questions about the powers and resources at their disposal and the relationship to other cities and towns, but it is a debate that must be moved forward in order to unlock meaningful change.



“The ‘look’ of a place and the culture and character of its people play a prominent role in its image and identity”



PART 2

CULTURE AND CHARACTER - WHAT WILL SHAPE THE PERSONALITIES OF THE AGE CITIES?

All three AGE cities are well-endowed with civic and cultural facilities. They sustain vibrant cultural economies, supporting thousands of jobs and contributing hundreds of millions of pounds to the national economy. However, to enable transition from industrial to knowledge economy in the urban age will require new thinking around what space, and sense of place, mean within Scotland's major cities.

How can the urban environments of our streets, squares, transport hubs and neighbourhoods be adapted to complement this shift?

Aberdeen's dependency on a single industry has been a consistent narrative for many years, and the impact of the recent oil price crash has highlighted that vulnerability. Its highly specialised economy is dominated by the oil and gas sector, and the city is an international hub for global and locally owned businesses operating in the North Sea and exporting skills, expertise and technology worldwide.

The city's global connections, its skilled workforce, high-quality universities, specialist R&D capabilities and professional services all provide solid foundations in the drive to build a new future. ONE, the private sector-led economic development company, is

leading the drive to diversify the regional economy with a focus on food and drink, life sciences, tourism and leisure. There are signs of confidence returning to the city, with cultural events such as Nuart (which stemmed from the city's links to Norway where the festival was founded) beginning to gain a foothold and the regeneration of Aberdeen Music Hall demonstrating that the city is beginning to invest in its cultural assets as part of its efforts to drive growth.

The highly skilled knowledge base of its workforce should help Aberdeen to adapt if it can decide on a shared vision which the business community, politicians and citizens buy into. People leaving the oil and gas sector are already making an important contribution to the new company birth rate - with businesses which are proving to

be more diverse than ever before.
Glasgow's narrative of adaptation and recovery since the late 1980s after decades of decline is one of the most remarkable regeneration success

“The AGE cities are ‘places where talent wants to be’ precisely because they combine opportunities and challenges for the best with a quality of life which is envied around the world.”

stories of our time, and it is recognised as such internationally. The city's progress has been marked by high-profile events (the Garden Festival, the European City of Culture, the Commonwealth Games) and campaigns such as ‘Glasgow's Miles Better’ and ‘People Make Glasgow’. The city is renowned for culture, shopping and entertainment; new urban quarters such as the Merchant City and Finnieston have emerged; and the public realm has been transformed.

There is now a body of evidence to support Glasgow's reinvention as a diverse, outward-looking, post-industrial city - through Glasgow's status as the UK's

leading retail centre outside of London; visitor numbers and revenue; and population growth in the past decade.

Edinburgh has long been a diverse economy, a centre for government, business, finance and law; as well as the nation's capital, with all the inherent advantages this brings. Industry played its part in Edinburgh's past but on a relatively modest scale. Diversification, a skilled workforce, high-quality public institutions, a rich architectural and cultural heritage which has been translated into modern, commercially successful, and globally famous festivals, have all contributed to the city's striking resilience - not immune to the effects of the market cycle, but better placed than most to absorb



“The measure of a city's success is not just how it promotes its extraordinary qualities, but instead the attention and care it gives to its ordinary places and corners”

shocks and exploit new opportunities.
 The troubled tram project that dented the city's reputation may yet pay off when the extension to Leith is completed, closing the gap between the centre and the waterfront. The redevelopment of the St James Centre will reinvigorate the east end. Edinburgh's accessibility as a compact city, with excellent quality of life and a diverse housing stock means that, whereas many other cities experience flight to the suburbs, its most prosperous residents often choose to live close to the centre. For this reason population growth in the

city has more or less kept pace with its most popular commuter zones in the Lothians.
 Ultimately, the trend towards urban concentration means that as the knowledge economy takes hold, Scotland's cities will need to be better prepared to capitalise on their local distinctiveness to distinguish their unique offering and secure a competitive advantage in terms of the residents and visitors they can attract. That will not just be about creating one-off iconic buildings in city centres, but ensuring overlapping neighbourhoods are designed to work as effectively as possible on a day-to-day level.

“Scotland’s urban planning organisations are under-powered and inadequately resourced.”



PART 3

PLACE-MAKING AND TECHNOLOGY - HOW CAN WE HELP TO FUTURE PROOF THE BUILT ENVIRONMENT?

In many ways the AGE cities represent the best of contemporary urban life: they are great places to live, work and visit and they have adapted successfully to new challenges. They are well set to embrace the shift to become 21st century knowledge cities.

The AGE cities value and have enhanced their heritage. They have been ardent adherents to cultural and physical development and regeneration, and that has paid dividends in the form of image and reputation enhancements. These qualities have been hard-fought and hard-won, and as such need to be fiercely and fervently protected.

Across the world successful cities have tackled the urban age by creating high-quality - and, crucially, high-density - housing to meet the needs of their growing populations. With the exception of Aberdeen, however, there remains a productivity gap between Scotland’s principal cities when compared with similar European cities such as Rotterdam, Antwerp and Dortmund or in Edinburgh’s case Geneva. At best they are keeping pace with these peers, but there remains much room for improvement and scope to aim much higher.

In Scotland and its principal AGE cities,

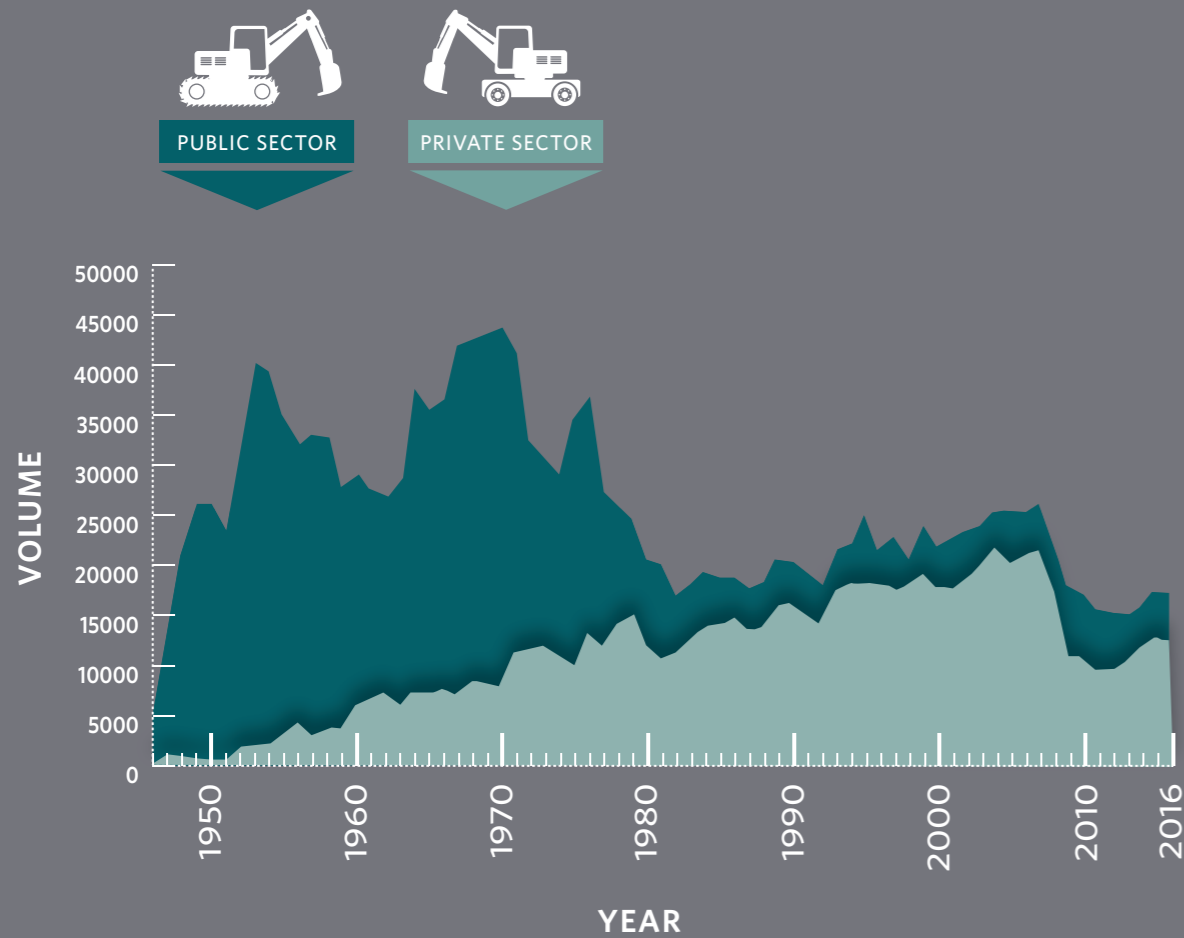
the current housebuilding rate is suppressed and simply inadequate for the country’s demographic need. The private sector build-and-sell model delivers four-fifths of new homes in Scotland. The relationship between owner-occupied, private rented and affordable housing sectors is complex and dynamic, with owner occupation falling from its peak in 2008.

The way local authority boundaries are drawn also has an effect on the geography of deprivation in the AGE cities. For example, a large part of Glasgow’s knowledge workforce is domiciled within surrounding authorities to a much greater degree than Aberdeen or Edinburgh. This has led to Scotland’s AGE cities being characterised by uneven development, and even in the most prosperous and successful places there are pockets of persistent poverty and deprivation.

Scotland’s housing policy and strategy clearly recognise and support the need for a

UNDERSTANDING THE AGE CITIES

3. Housing completions in Scotland by sector:



“Each city has experienced very different trajectories of change in the post-industrial era.”

more diverse housing system, but the AGE cities are simply not building enough new affordable, rented and alternative tenure housing units because urban planning organisations are under-powered and inadequately resourced. The requirement to accelerate and diversify housebuilding in the AGE cities raises funding and capacity challenges as well as civic and planning issues.

So how can this long-standing issue be overcome? How do we achieve the internationally-recognised ‘Inclusive City’ model in which everyone, including the vulnerable, can contribute productively

and enjoy the benefits of urban life? And who should take the lead in doing so?

The challenge for city regions is to adapt quickly to prevent struggling areas from being locked into a cycle of decline, and to reconnect less favoured places to areas of opportunity. Achieving this kind of resilience is a complex task, but an accessible and well-connected urban system has an important role to play in facilitating an efficient labour market, promoting productivity and enriching a city’s commercial potential.

The way cities are planned and developed, and how housing, urban mobility, traffic and public transport are coordinated, are critical factors in securing healthy environments, sustainable growth and a good quality of life for citizens. A truly integrated planning approach is needed, to ensure that these different facets of the city proceed in balance.

All three cities have the potential to move up the European league tables. However, a concerted effort will be required between private businesses, third sector organisations and political policymakers to detoxify the debate around housing, place-making and connectivity in order to deliver meaningful change and ensure that we can build truly inclusive cities.



“Only major, transformative changes will provide the impetus required to start closing the productivity gap, fostering real innovation and creating sustainable living spaces that help to eradicate poverty.”



CONCLUSION

HOW CAN WE CREATE A 'NEW URBAN AGE' FOR SCOTLAND?

The complexity of tackling the new urban age means there is no single solution or 'silver bullet' that can solve the challenges the AGE cities face.

However, by drawing comparisons to similar sized cities and nations elsewhere and understanding how the successful ones have made progress, we are able to understand the scale of the task and how radical some of the solutions may require to be.

The recommendations listed over the page emerged from the study as the key actions which could kick-start positive change and underpin the future growth of both the AGE cities and the country as a whole.

The full report offers a menu of choices for the future direction of the country's critical hubs, highlighting the challenges and suggesting potential solutions.

Only major, transformative changes will provide the impetus required to start closing the productivity gap, fostering real innovation and creating sustainable living spaces that help to eradicate poverty.

Aberdeen, Glasgow and Edinburgh have crucial roles in paving a brighter future for both the private and public sectors, which so depend on them.

However, individual citizens and local communities also have an important part to play in Scotland's 'new urban age', because an engaged contribution from each and every one of us is needed to chart a new, more prosperous course in the century of the city.

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REPORT RECOMMENDATIONS:

THE APPOINTMENT OF A DEDICATED MINISTER FOR CITIES to ensure targeted policy-making in the AGE cities is consistent and also dovetailed with wider rural strategies for maximum economic benefit.



A MAJOR REALIGNMENT OF SCOTLAND'S HOUSING STRATEGY is required to produce far more good quality, higher-density homes, and empower communities to get involved in place-making that suits local needs.



DEVELOPING A NEW INVESTMENT STRATEGY that prioritises truly transformative change in a bid to close the productivity gap with comparative peer cities internationally.



TACKLING SCOTLAND'S CONNECTIVITY SURCHARGE with fast-track rail links and an upgraded road system is a major priority. This will not only ensure that the AGE cities are better connected, but also that towns and regions have access to them and can benefit directly from their success.




RADICAL RESHAPING OF BUSINESS RATES POLICY to counter the impact of technology on retail and encourage rapid repurposing of building stock to more productive uses.



FASTER ADOPTION OF SUSTAINABLE TRANSPORT SCHEMES and clean fuel technology to free up key real estate, tackle traffic congestion and mitigate the impact of climate change.



TO DOWNLOAD THE FULL REPORT AND VIEW THE
ACCOMPANYING INTERACTIVE CONTENT GO TO:

 <http://campaigns.burnesspaull.com/urban-age>

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