

Annex 9: Housing Need

Links to Evidence

Scottish Government:

[Draft NPF4 - Housing land requirement explanatory report](#)

[NPF4 Housing Background Paper/Scottish Government technical paper on final MATHLR figures](#)

[NPF4 - housing land requirement - report addendum Housing to 2040](#)

Fife Council:

HNDAs

[Tayside HNDA3 final report for North Fife](#)

[Tayside HNDA - CHMA Sign Off](#)

[SES HNDA3 Final Report](#)

[SES HNDA - CHMA Sign Off](#)

[South East Scotland HNDA3 Consultation](#)

Additional Primary Research Data for Fife Element of South East Scotland HNDA (see Appendix 3 of Annex 11)

[Fife Council Affordable Housing Supplementary Guidance](#)

LHS/SHIP

[Local Housing Strategy](#)

[Local Housing Strategy Appendix 5 - Housing Supply Target Evidence Paper](#)

[Strategic Housing Investment Plan \(SHIP\) 2023/24 - 2027/28](#)

[Strategic Housing Investment Plan \(SHIP\) 2023/24 - 2027/28 Projects Table](#)

Affordable Housing

[Affordable Housing Phase 4 Committee Report](#)

Specific Studies

[Fife Wheelchair Study Report](#)

[Gypsy & Traveller Communities PAS Report](#)

NPF4:

[Response to Scot Parliament Scrutiny Committee 10 Feb 2022](#)

[Committee report \(10 June 2021\) for MATHLR consultation](#)

Others:

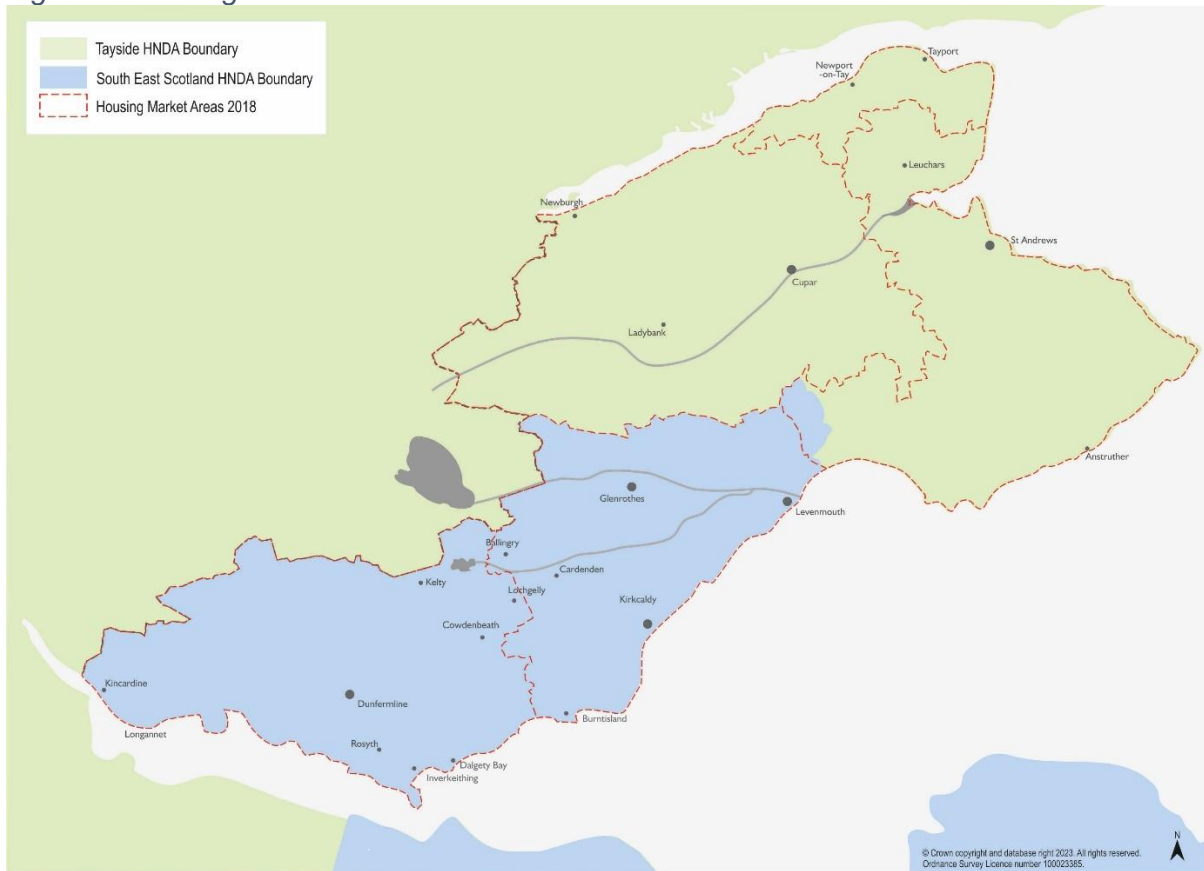
[St Andrews University Student Accommodation Report](#)

Summary of Evidence – Fife Wide

Introduction - Housing Geographies

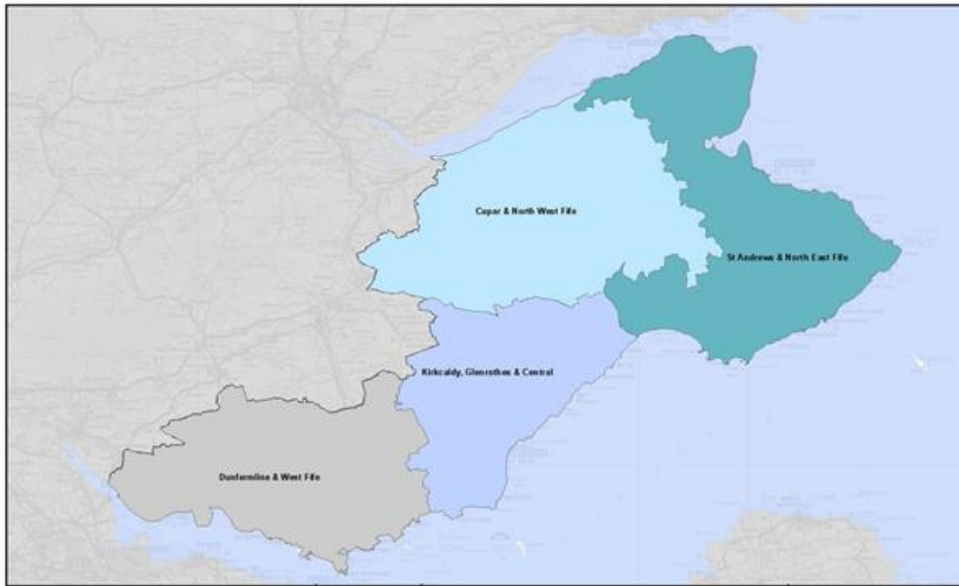
A9.1 When assessing housing need and demand, Fife is split into two Minimum All Tenure Housing Land Requirements (MATHLRs) which reflects the two regional Housing Need and Demand Assessments (HNDAs).

Figure 1: Housing Need and Demand Boundaries



A9.2 These are further broken down into 4 Housing Market Areas (HMAs):

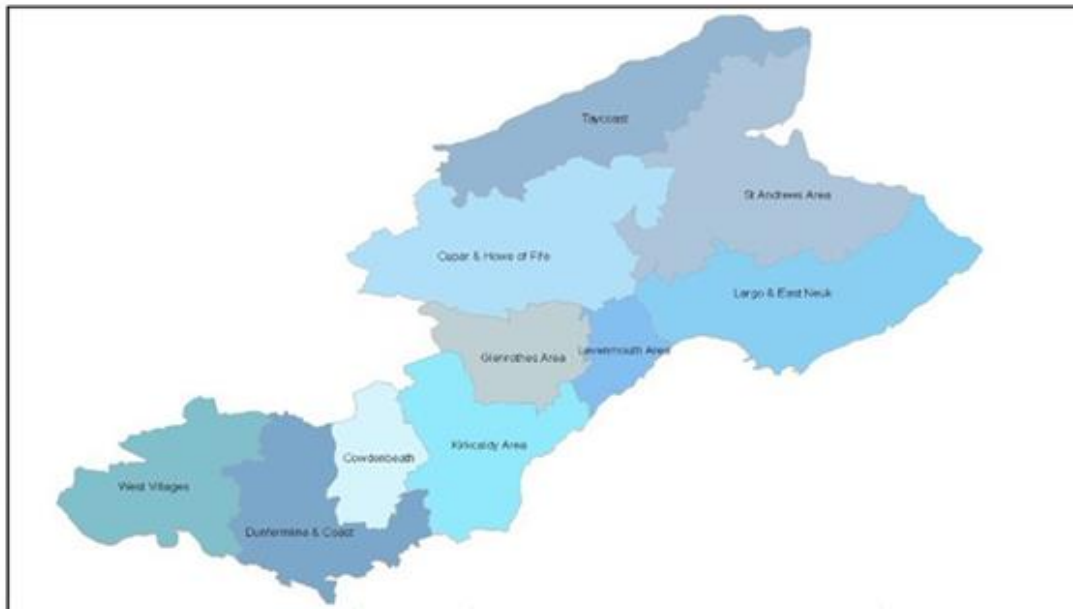
Figure 2: Housing Market Area Boundaries



A9.3 Fife is uniquely linked to two city regions for the purposes of housing – the two most northerly HMAs to Dundee City and the two central and west HMAs to the City of Edinburgh.

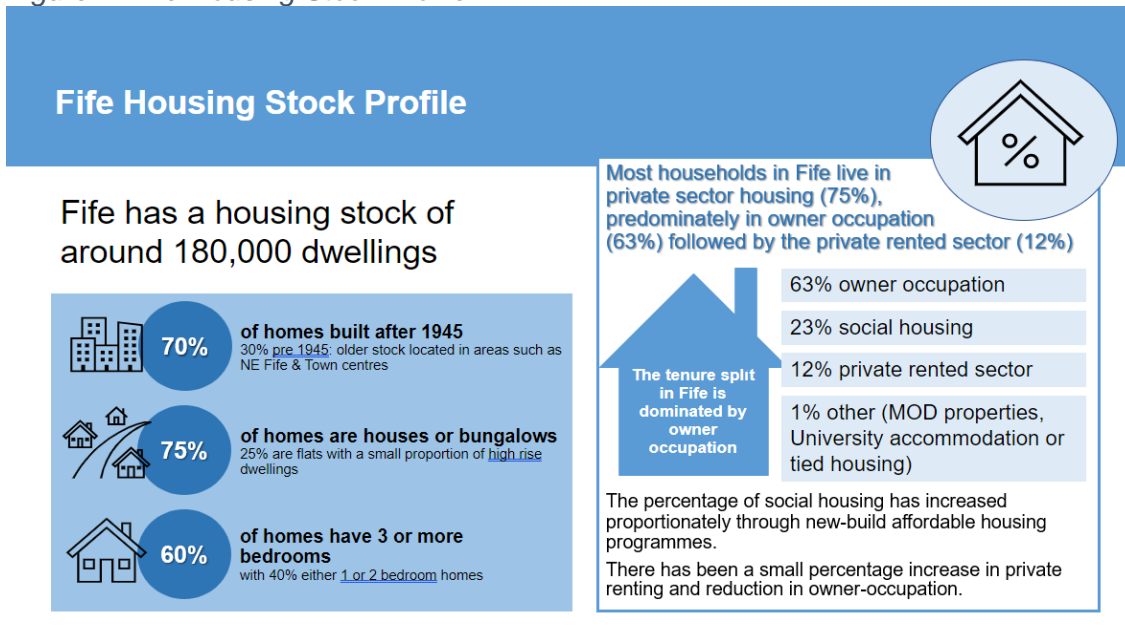
A9.4 The HMAs summarise the sub-regional picture and housing need and demand is defined at HMA level. In addition, more detailed housing data is collected by the 10 Local Housing Strategy (LHS) areas (see map below).

Figure 3: Local Housing Strategy Areas



Existing Housing Stock - Fife Wide

Figure 4: Fife Housing Stock Profile



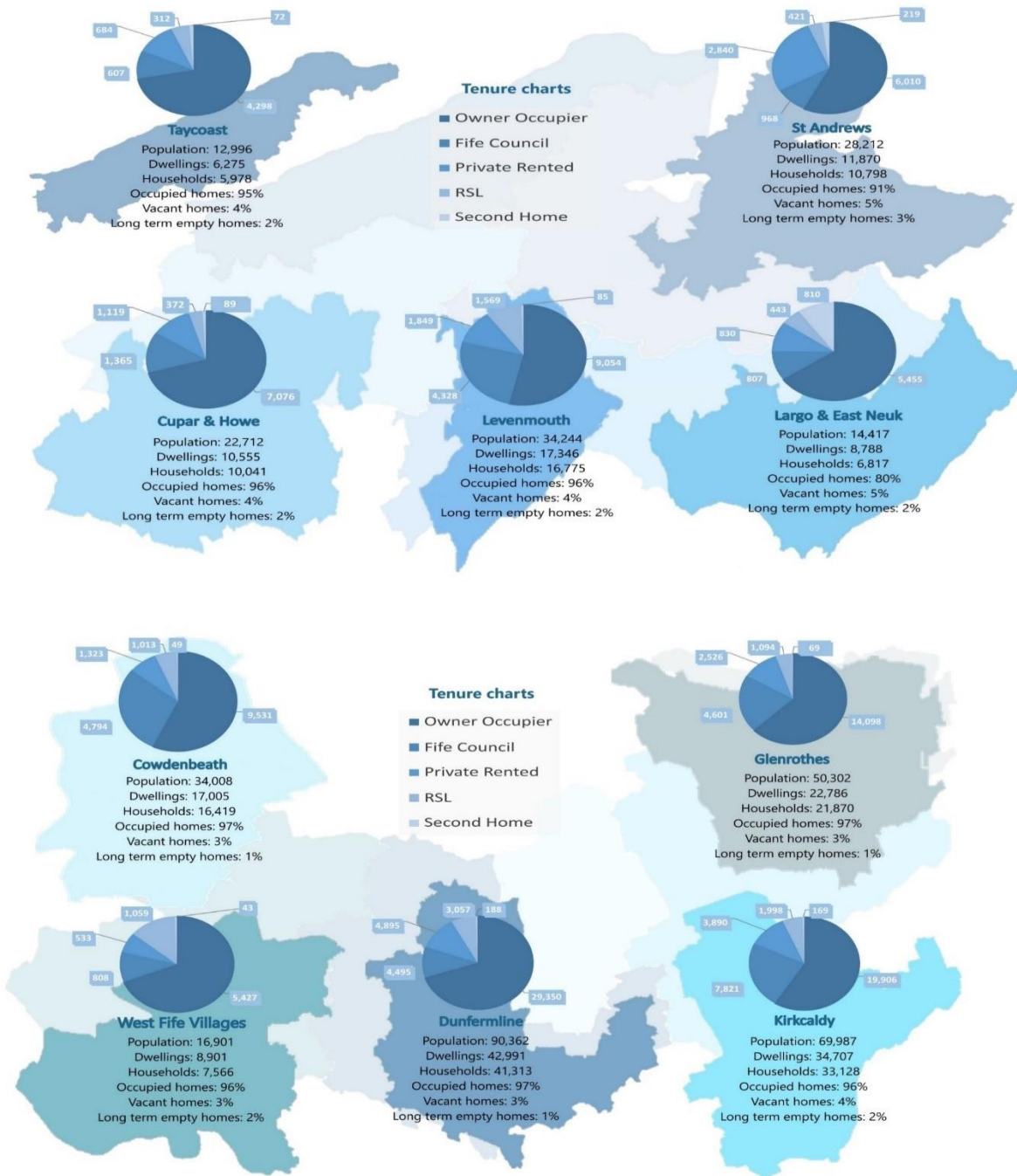
Source: Local Housing Strategy 2022-2027

A9.5 Fife has a housing stock of around 180,000 dwellings. The stock profile has remained relatively unchanged over time with just over 70% of housing built after 1945 and just under 30% pre-1945, with older housing being located in areas such as North-East Fife and older town centres. Around 75% of dwellings are provided as houses and the remainder as flats with a small proportion of high-rise dwellings. Around 60% of homes have three or more bedrooms and the remainder with two or fewer.

A9.6 The tenure profile indicates around 63% owner-occupation, 23% social housing and 12% private renting. The percentage of social housing has increased proportionately through new-build affordable housing programmes. There has been a small percentage increase in private renting and reduction in owner-occupation. 'Other' includes MOD properties, University halls and tied accommodation.

Key Characteristics of Local Housing Strategy Areas

Figure 5: Summary of the key characteristics of each Local Housing Strategy Area

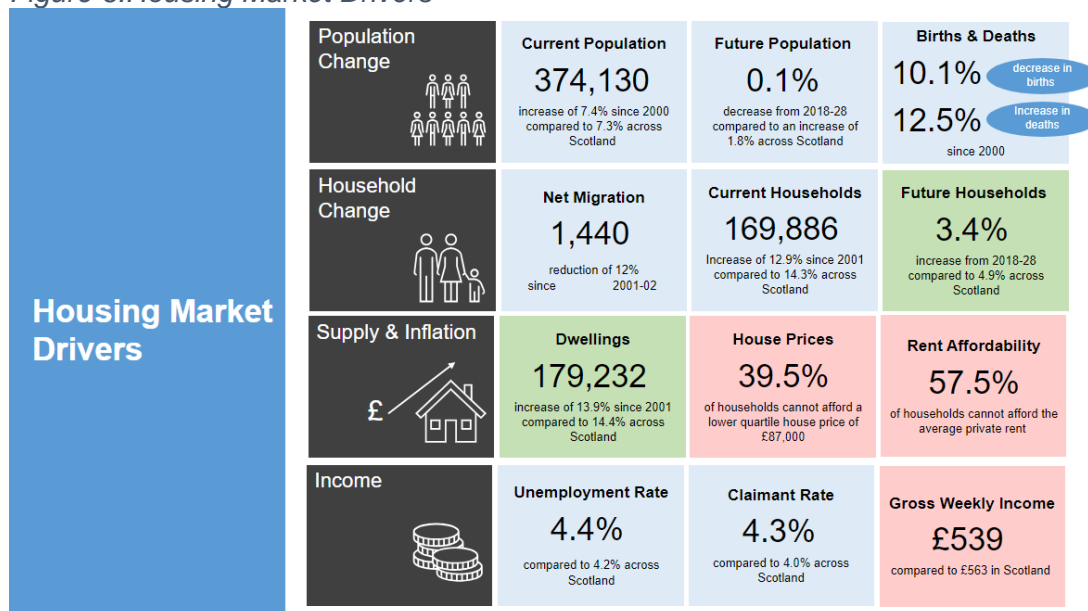


Source: Local Housing Strategy 2022-2027

Housing Need and Demand Assessments & Key Drivers

A9.7 As summarised below, there are a number of key drivers which affect housing need and demand which are addressed in the HNDAs with further detail at relevant points in the LHS ([Local Housing Strategy](#)).

Figure 6: Housing Market Drivers



Source: Local Housing Strategy 2022-2027

A9.8 The HNDAs have been developed to inform the LHS and the Local Development Plan Evidence Report, following the methodology set in Scottish Government guidance:

- Tayside HNDA – assesses housing need and demand for North-East Fife, Angus, Dundee and Perth and Kinross. It was concluded on the 9th May 2023 when the Scottish Government confirmed it as a ‘robust and credible’ assessment.
- South-East Scotland HNDA – assesses housing need and demand for Fife (West & Central), the City of Edinburgh, East Lothian, Midlothian, Scottish Borders and West Lothian. It concluded on the 28th July 2022 when the Scottish Government confirmed it as a ‘robust and credible’ assessment.

Existing Need

A9.9 An HNDA estimates the future number of additional housing units required to meet existing and future housing need and demand. Due to the regional split in Fife, the net need for additional housing was generated by the two HNDAs carried out at regional level (Tayside and South East Scotland).

Table 1: Existing Housing Need from HNDAs

Households	Fife (West & Central)	Fife (North)	Fife Total
Homeless / housing insecurity	1,246	485	1,731
Both overcrowded and concealed	171	157	328
Requiring specialist housing	263	70	333
Total existing need	1,680	712	2,392

Source: Local Housing Strategy 2022-2027

A9.10 The tables below show the methodology used by Fife Council in both HNDAs to measure need, this resulted in increased numbers compared to if the default “Houses that are both Overcrowded and Concealed” (HoTOC) of the HNDA tool was used. This is discussed in more detail within the Indicative Local Housing Land Requirement Technical Paper.

Table 2: Preferred South East Scotland HNDA methodology

Category of Need	Outcome	Data Source	Comment
Homeless households and those residing in temporary accommodation	1,302 live applications 57 household deduction for cases resolved out with social housing 1,246 net need	HL1 live applications at 31 st March 2021	Timing of data extraction reflects impacts of Covid pandemic Deduction based on past trends for accommodation secured in the private sector
Both Overcrowded and Concealed	171 households	Census 2011 uprated to SHCS 2017-19 following Scot Govt guidance	HoTOC methodology used for this need category but uprated to 2017-19.
Support needs / special forms of housing	263 households	Fife Housing Register applicants with a high priority (100+ points) for either wheelchair, extra care or retirement housing	Additional category not in the HoTOC calculation
Total	1,679 households	HNDA tool and HNDA Project Team methodology	SES Fife figure

Source: South East Scotland Housing Need & Demand Assessment

Table 3: Preferred Tayside HNDA methodology

Category of Need	Outcome	Data Source	Comment
Households residing in temporary accommodation & those with insecure tenure	168 households in Temporary Accommodation 317 insecure households 485 homeless households	HL1 at 31 st March 2021 Tay HNDA survey (Q Main reasons why you would like OR need to move at present? A=Evicted by landlord, previous home temp. or thrown out by Friends/ Relatives)	Timing of data extraction reflects impacts of Covid pandemic. Insecure households include those with notice of eviction, repossession, threat of notice or lease coming to an end
Both Overcrowded and Concealed	157 households	Tay HNDA survey (Q Does your household share any rooms with any other person or household? A=Kitchen, bathroom, WC, other)	Currently sharing amenities with another household but not sharing meals
Specialist housing	70 households	Fife Housing Register applicants with a high priority (100+ points) for either wheelchair, extra care or retirement housing	Additional category not in the HoTOC calculation
Total	712 households	HNDA Project Team methodology	Tay Fife figure

Source: Tayside Housing Need & Demand Assessment

Table 4: Preferred combined HNDA methodology

Category of Need	Outcome	Data Source	Comment
Combined SES & Tay Fife Total	2,391 households	HNDA Project Team methodologies	1,651 household increase on the HoTOC methodology

Sources: South East Scotland & Tayside Housing Need & Demand Assessments

Table 5: HNDA HoTOC methodology

HoTOC methodology (all Fife)			
Category of Need	Outcome	Data Source	Comment
Households residing in temporary accommodation.	525 households in TA	HL1 on 31st March 2020	
Both Overcrowded and Concealed	215 households	Census 2011 uprated to SHCS 2016-18 following Scot Govt guidance	
Total	740 households	HNDA Tool	All Fife figure

Sources: South East Scotland & Tayside Housing Need & Demand Assessments

Future Need

A9.11 The combined HNDAs indicate 2,392 households are in existing housing need and require social rented housing to meet that need. This figure informed a range of HNDA scenarios from 'strong growth' through to 'no growth' in income, house prices and rents. The preferred scenario for Fife was agreed as 'steady growth' where 470 new homes are required per annum over a 20-year period. This comprises of 253 (54%) affordable homes and 217 (46%) market homes. The combined affordable and market estimates are shown in five-year bands table 6 below:

Table 6: Annual HNDA Housing Estimates for Steady Growth Scenario in Fife

Steady Growth Scenario	2021 - 2025	2026 - 2030	2031 - 2035	2036 - 2040	20 Year Total	20 Year p.a.
Social rent	489	153	58	48	3,738	187
Below market	102	58	56	47	1,316	66
Private rent	140	68	59	43	1,551	78
Owner occupied	213	123	122	102	2,796	140
Total p.a.	944	402	295	239	9,401	470
Affordable p.a.	592	211	114	95	5,054	253
Market p.a.	352	191	181	145	4,347	217

Some totals affected by rounding

Source: Local Housing Strategy 2022-2027

A9.12 For housing supply purposes in Fife, the estimates are examined over a 10-year period from 2021-2030 as it is anticipated existing need will be cleared during this timeframe (7 years clearance in South East Scotland, 5 years clearance in Tayside). Between 2021-2030, it is estimated that 673 new homes will be required on an annual basis in accordance with the HNDA steady growth scenario. This comprises of 401 (60%) affordable homes and 272 (40%) market homes.

A9.13 Within the HNDA, housing estimates have been disaggregated down to Housing Market Area level in Fife.

A9.14 Table 7 below shows disaggregated estimates by tenure, over a 10-year period by HMA.

Table 7: HNDA Housing Estimates by Steady Growth Scenario and Housing Market Area

Housing Market Area	St Andrews and North-East Fife	Cupar and North-West Fife	Dunfermline and West Fife	Kirkcaldy, Glenrothes & Central Fife	Fife Total & % tenure split
Affordable p.a 2021-30	55	42	135	170	401 (60%)
Market p.a 2021-30	27	23	110	111	272 (40%)
Total p.a. 2021-30	82	66	245	280	673

Some totals affected by rounding

Source: Local Housing Strategy 2022-2027: Appendix 5 - Housing Supply Targets

Specialist Housing

A9.15 While the combined HNDAs provided the overall housing estimates for Fife, a range of specialist housing requirements have also been identified in Fife. These are summarised below:

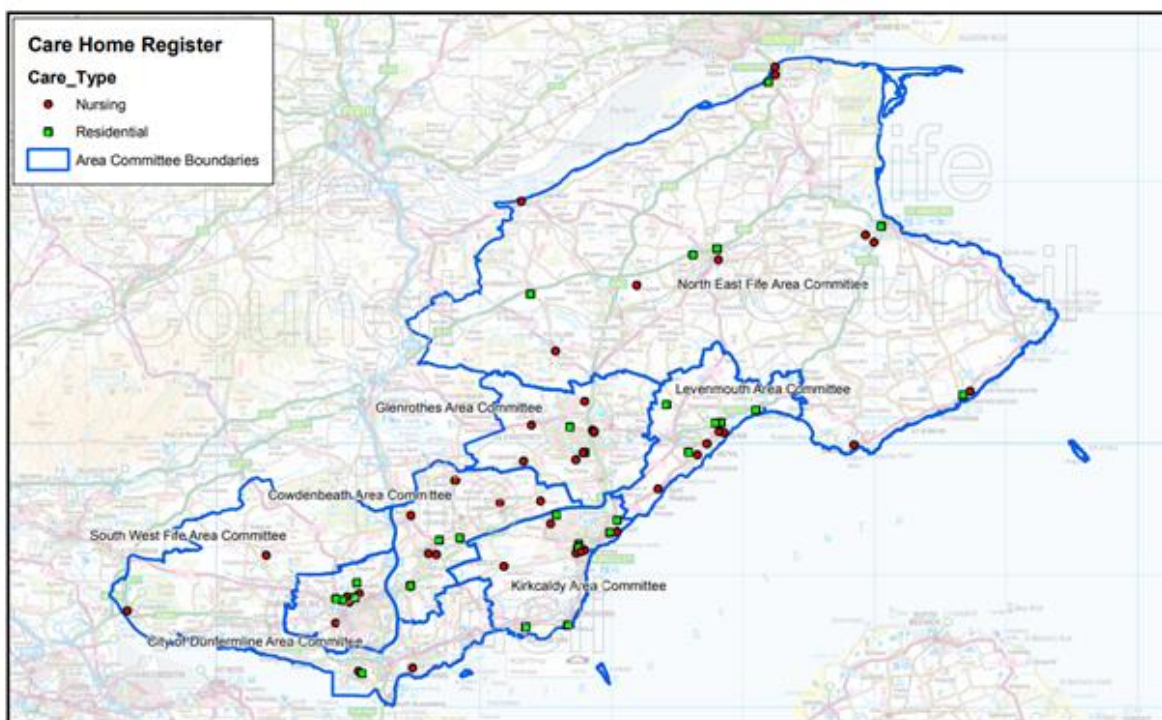
Table 8: Specialist Housing Requirements in Fife

Specialist Housing Type	Provision	Need/Gap	Source
Accessible housing	22% of households say their home is accessible to a wheelchair user visiting the property	2,689 accessible homes required across private and social housing tenures.	Wheelchair & Accessible Housing Study including household survey 2022. Carried out by Arneil Johnston consultants
Wheelchair housing	1% of homes are wheelchair adapted housing	612 wheelchair homes required across private and social housing tenures.	Wheelchair & Accessible Housing Study including household survey 2022. Carried out by Arneil Johnston consultants
Adapted housing	18.5% of homes have adaptations / 35% of social housing	2% of homes require adaptations / 8% in social housing. Low level of adaptations in private housing.	Scottish Housing Condition Survey 2017-19
Non-permanent housing	969 households in temporary accommodation Around 4,181 purpose-built student bedspaces St Andrews for 10,360 students	2,502 households presenting as homeless. Identified need for 1,000 additional bed spaces in St Andrews	Fife Council April 2021 – March 2022 University of St Andrews
Supported Provision	1,106 sheltered 387 very sheltered 237 community alarm	1,093 households requiring sheltered housing (nil points excluded)	Scottish Housing Regulator 2020-21 Fife Housing register February 2022
Care and support for independent living at home	5% of households have one or more members receiving care	Low provision of care services in private housing	Scottish House Condition Survey 2017-19
Site provision	50 pitches for Gypsy/ Travellers across 3 sites	Site improvements required/underway	Fife Council February 2022

Care Homes/Supported Living

A9.16 In 2009, most care homes in Fife were developed and managed by the private sector, accounting for 69% of all care homes in the region. By 2019, a 25% reduction in local authority care homes, and a 56% reduction in voluntary sector care homes meant that the private sector accounted for 80% of all care homes in the area. There was an increase in occupancy levels across local authority and private care homes and a reduction in occupancy levels in care homes run by the voluntary sector.

Figure 7: Care Homes in Fife

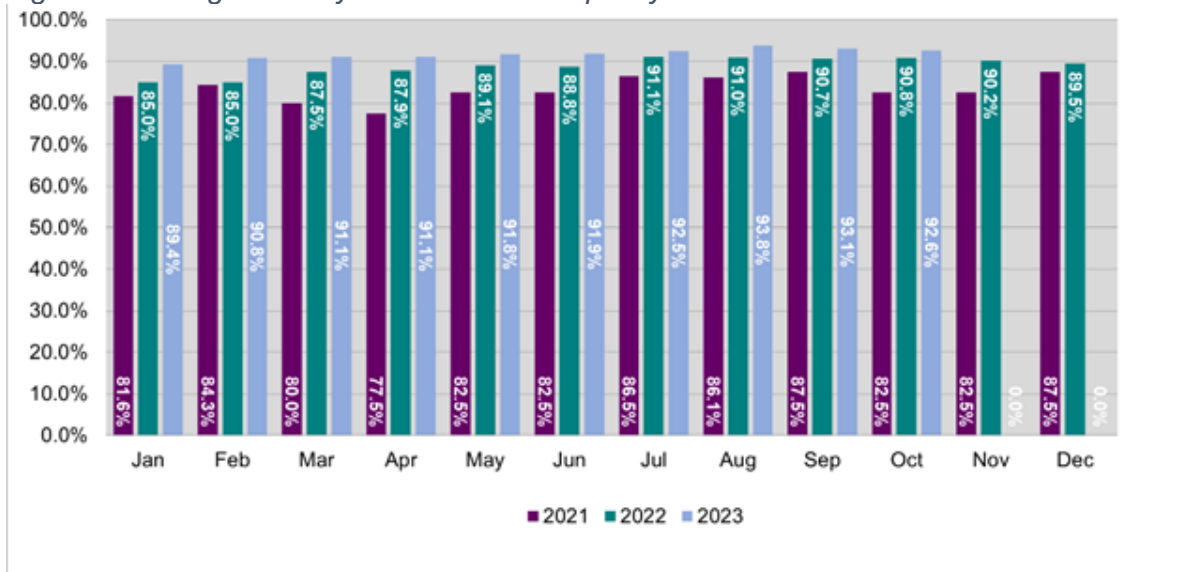


Source: Fife Health & Social Care Partnership

A9.17 Across Fife, there were 3,073 registered beds within care homes as at December 2023. As Figure 7 highlights, care homes tend to be clustered in the areas of greater population and therefore there is not a uniform provision of across Fife. Whilst generally there is a good choice of care homes in Mid Fife and the East Neuk of Fife, within West Fife provision has not kept up with demand in Dunfermline and there are challenges within East Fife between Cupar and St Andrews.

A9.18 As Figure 8 below illustrates, the average monthly care home occupancy has risen since 2021 indicating a high level of occupancy across all Fife care homes.

Figure 8: Average Monthly Care Home Occupancy in Fife



Source:

TURAS data, Scottish Government

A9.19 Within Fife (and nationally) there is a desire to design care homes differently. At present too many people are based in hospital, waiting for care packages to allow them to return home. Interim beds in care homes should be available before a care package is in place to allow a person to return home after a hospital stay (and therefore free up hospital beds quicker). There should be capacity in both the short term (where people need to be in the local community after a stay in hospital before returning home) and the longer term within care homes. The availability of short term beds can be challenging with the high level of occupancy rates illustrated above.

A9.20 A care home replacement programme is currently underway in Fife and some new facilities have already been opened with more programmed in later phases. Phase 1 of the programme, comprised of Ostlers House in Kirkcaldy, Napier House in Glenrothes and Lindsay House in Lumphinnans. These locations allowed for two homes to be reprovioned into one 60-bed residential care home, therefore replacing 6 homes. Ostlers House has a café/drop-in facility that can be accessed by the tenants of the extra care bungalows on site, whilst Glenrothes and Lumphinnans have an adjacent building containing 1 and 2 bedroom extra care housing flats and café/drop-in facility within these buildings.

A9.21 Methilhaven Home was the first of three homes to be replaced in Phase Two of Fife's Care Home Replacement Programme. This was developed into an integrated care village due to the need for additional nursery placements in Methil and increased social housing for older people.



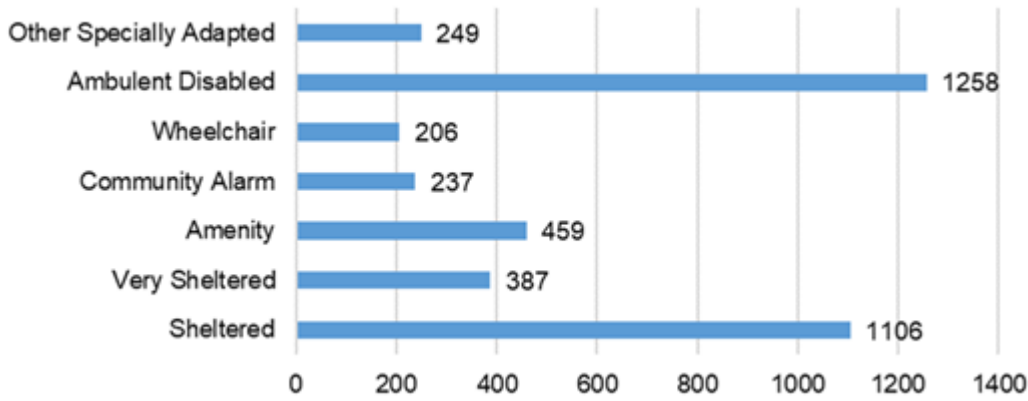
A9.22 Two more care homes are being reprovioned in Cupar and Anstruther. However, in each of these areas, there is no requirement for increased nursery provision. Therefore, these care villages will comprise of a joint building with the Fife Health & Social Care Partnership and Fife Council Housing Services. Cupar will comprise 24 residential care home beds, 12 1-bed supported housing flats, an adult day service facility and an older person's day service facility. Anstruther will comprise 24 residential care home beds, a mix of 12 1- and 2-bedroom extra care housing flats, day service facility for older people, café/drop-in facility and two large specific needs bungalows on site.

Amenity/Wheelchair Housing

A9.23 Following the conclusion of the HNDAs, Fife Council commissioned consultants to carry out a wheelchair and accessible housing study to review these targets. The study was informed by extensive primary and secondary research on the supply and unmet need for wheelchair and accessible housing in Fife.

A9.24 There are 3,902 units of specialist housing provided by social landlords across Fife, 10% of all homes in the social housing sector. The majority (58%) are provided by local operating Registered Social Landlords (RSLs), with the remainder provided by Fife Council (42%).

Figure 9: Fife Social Housing Specialist Stock



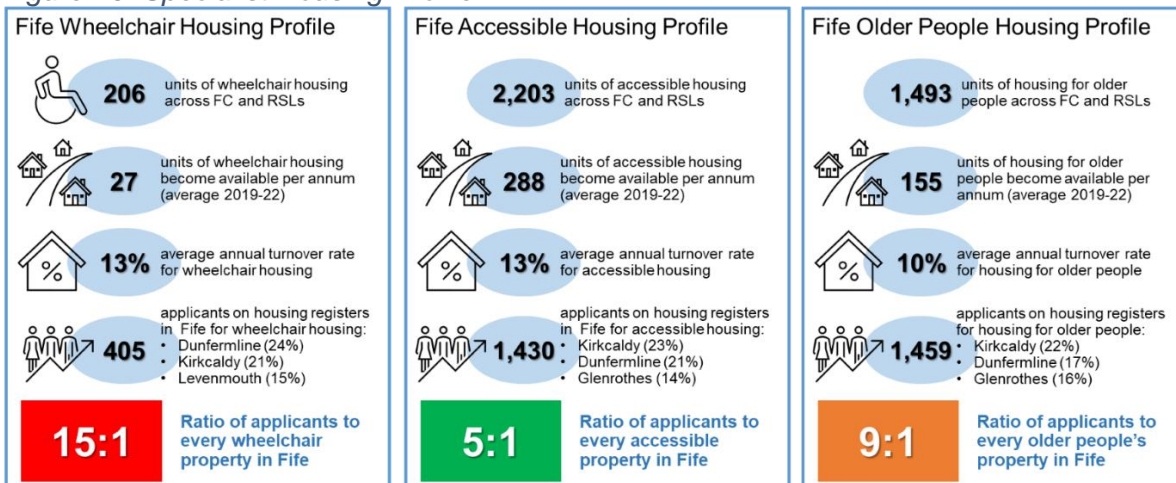
Specialist Housing Stock in Fife Social Housing Sector (2022)

Source: RSL and Fife Council data returns

A9.25 The majority of specialist homes in Fife (56%) can be classified as accessible housing (2,203), including ambulant disabled (1,258), amenity (459) and specifically adapted homes (249). A further 1,493 specialist homes (38%) are either sheltered or very sheltered with 237 homes which offer a community alarm.

A9.26 Just 5% of all specialist homes in Fife (206) are fully accessible wheelchair homes. The pressure ratio for wheelchair housing is 3 times greater than the equivalent for accessible housing, where 1 property becomes available for every 5 applicants. The ratio of applicants to turnover in older people’s housing in Fife is 9:1.

Figure 10: Specialist Housing Profile

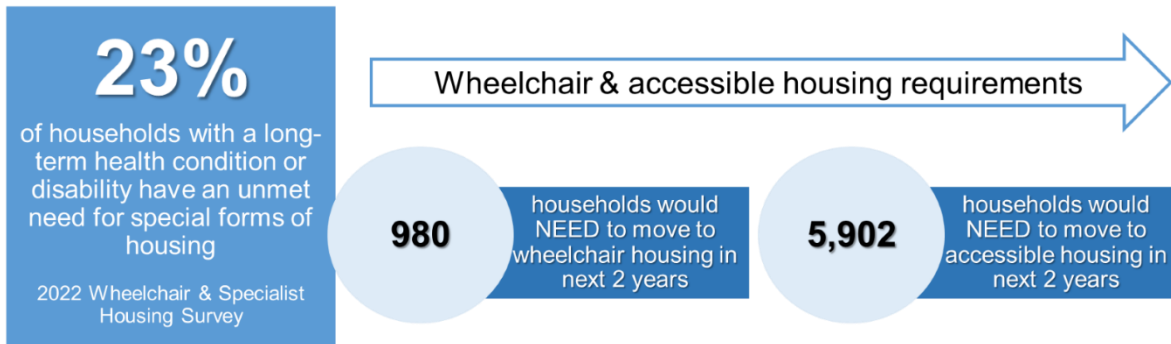


Source: Fife-Wheelchair-Specialist-Housing-Study-Report June-2023

A9.27 This analysis clearly shows that whilst demand for accessible and older people’s housing is 3.5 times higher in absolute terms (i.e. application numbers), significant pressures on wheelchair housing are evident across the Fife area.

A9.28 The 2022 Wheelchair and Accessible survey outcomes suggest that 980 households have an unmet need for wheelchair housing and 5,902 households have an unmet need for accessible housing across Fife. Furthermore, it was identified that 405 households are currently listed on the Fife Housing Register awaiting an offer of wheelchair accessible housing in the social housing sector, with 1,430 households who are awaiting an offer of accessible housing.

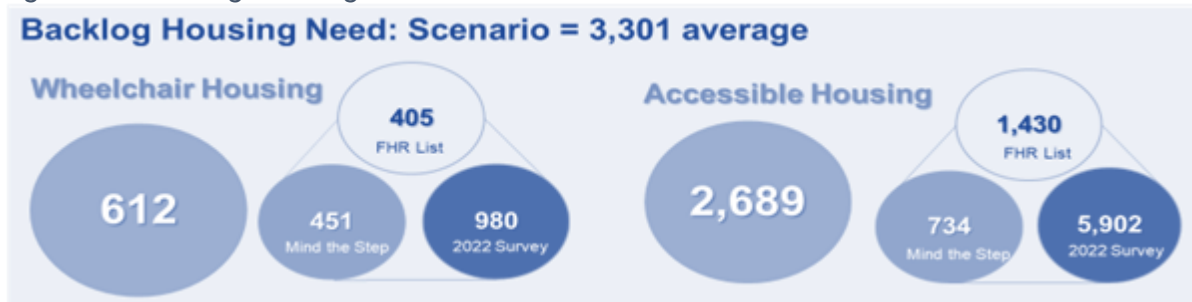
Figure 11: Wheelchair and Accessible housing Requirements



Source: Fife-Wheelchair-Specialist-Housing-Study-Report June-2023

A9.29 Research outcomes have helped develop estimates for wheelchair and accessible homes which have formed an evidence base for setting tenure specific targets within the LHS and SHIP for future housing delivery. Results demonstrated that 612 households in Fife are in need of wheelchair housing and 2,689 households in need of an accessible home (current backlog).

Figure 12: Backlog Housing Need



Source: Fife-Wheelchair-Specialist-Housing-Study-Report June-2023

[Final-2022-12-22-Fife-Wheelchair-Specialist-Housing-Study-Report-web-version-June-2023.docx \(live.com\)](#)

Specialist Housing Targets

A9.30 Since 2017, when the 5% affordable housing wheelchair target was introduced through the SHIP, 114 new wheelchair accessible homes have been provided across Fife through the Affordable Housing Supply Programme (AHSP). In addition, a broad range of products and changes have been made to the fabric of existing stock (including assist technology) which has enabled people of all ages to carry out ordinary activities of daily life that have been affected by:

- Impairment
- Ill health
- Traumatic injury
- The effects of ageing

Table 9: Adaptions to Properties

Year	Fife Council permanent adaption	Fife Council temporary adaption	Private permanent adaption	Private temporary adaption
2022/23	64	152	144	254
2021/22	246	136	106	251
2020/21	175	n/a	122	224
2019/20	246	182	191	306
2018/19	308	193	258	356

Source: Fife Housing Register & Local Housing Strategy

A9.31 Permanent adaption to Fife Council properties are funded through the Housing Revenue Account (HRA) and include adaption such as wet floor rooms, concrete ramps, kitchen adaption and door widening. The temporary adaption to Council properties are funded through capital monies and include adaption such as ramps, through floor lifts, stair lifts and hoists. The adaption to private properties are funded through grant assistance from Fife Council with works falling into the same categories as Council properties.

A9.32 The need and targets for wheelchair housing (see Table 10) will be reviewed alongside the development of phase 4 of the Affordable Housing Programme as well as on an annual basis through the Local Housing Strategy.

Table 10: Wheelchair housing need (as of April 2023)

Year	Total Fife Housing Register Applicants	No. of wheelchair applications	% of total applicants
2023	11,815	374	3.17%
2022	12,643	396	3.13%
2021	13,702	441	3.22%
2020	13,223	n/a	n/a
2019	12,515	n/a	n/a
2018	12,207	n/a	n/a

Source: Fife Housing Register April 2023

* Data recording through Fife Housing Register list started in 2021 to reflect the updated HNDAs/Wheelchair Study.

Table 11: Disabled Applicants (as of April 2023)

Year	Total Fife Housing Register Applicants	No. of disabled applications	% of total applicants
2023	11,815	1,377	11.65%
2022	12,643	1,444	11.42%
2021	13,702	1,585	11.57%
2020	13,223	1,227	9.28%
2019	12,515	864	6.90%
2018	12,207	840	6.88%

Source: Fife Housing Register April 2023

A9.33 Due to the need identified for households requiring supported housing, the delivery of older persons housing has been prioritised and a target to deliver 294 homes suitable for older persons between 2022 and 2027 has been set in the SHIP. Since 2017, 83 new homes specifically for older persons have been provided across Fife through the AHSP. The provision of older persons housing will be monitored through the annual Local Housing Strategy updates.

Table 12: Sheltered Applicants (as of April 2023)

Year	Total Fife Housing Register Applicants	Zero Points	High Need	Medium Need	Low Need	Total	% of total applicants
2023	11,815	177	66	268	463	974	8.24%
2022	12,643	166	102	294	508	1,070	8.46%
2021	13,702	182	116	337	540	1,175	8.58%
2020	13,223	154	129	312	469	1,064	8.05%
2019	12,515	152	90	233	427	902	7.21%
2018	12,207	192	92	229	345	858	7.03%

Source: Fife Housing Register April 2023

A9.34 Various targets have been set for specialist housing through the Local Housing Strategy as detailed above. It is estimated that the projects included within the SHIP have the potential to deliver 31% of the properties to meet specific needs and 6.5% of the properties to wheelchair accessible standard. It is also expected that 118 homes suitable for older persons will be delivered in the next 2 years with a further 176 homes anticipated in future years.

Gypsy/Travellers

A9.35 Planning Aid Scotland (PAS) was commissioned by Fife Council to understand the views and priorities of Gypsies and Travellers and Travelling Showpersons in relation to their land use, accommodation, service provision needs and aspirations, including access to temporary and permanent sites. Based on the conversations, which took place between February and May 2023, PAS concluded that there is no clear need for additional land to be assigned for public sites. The three existing public sites are valued in terms of meeting an accommodation need but would benefit from improved facilities and maintenance. Council sites in Fife currently meet the minimum condition standards required by the Social Housing Charter with improvement work recently carried out to amenity blocks at the Kirkcaldy site through kitchen and bathroom replacements as well as improving energy efficiency. Tenants have expressed an interest to have residential mobile homes and chalets installed on site and a 3-year capital plan is in place to achieve this on two of the three Council sites in Fife, with potential for implementation on the remaining site. [LDP Docs - Fife LDP Gypsy Traveller & Travelling Showpersons LDP Engagement Report - PAS \(May 2023\)\(1\) \(1\).pdf - All Documents \(sharepoint.com\)](#)

Housing for Further and Higher Education

Table 13: Tenure of adults in further/higher education

Tenure	% Adults in further/higher education in Fife			
	2016	2017	2018	2019
Owner Occupied	4	2	4	1
Private Rent	16	16	14	9
Social Rent	3	7	2	1

Source: Scottish Government (2020) Scottish Household Survey Adult Characteristics by Tenure – Economic Situation 2019. Fife figure represents all Fife.

St Andrews University

A9.36 St. Andrews University currently provides around 4,181 purpose-built student bedspaces over 17 residences in St Andrews for its 10,360 students. Through partnership arrangements, circa 550 additional beds are also provided in Leuchars, Dundee, and St Andrews. In addition, private purpose built student accommodation within St Andrews currently provides circa 380 additional beds with another 3 developments (totalling circa 550 beds) in the pipeline and at various stages in the planning process. However, the University have highlighted that private PBSA developments can often cause affordability challenges for their students with rentals being out of reach for many students.

A9.37 The University's Strategy sets out the intention to maintain student numbers at circa 10,000 students. In order to support the University population, and to replace existing residences within the estate which are no longer fit for purpose, the University has an initial requirement to deliver circa 1,000 new student bed spaces taking the total University provided residential capacity to circa 5,000. This will be delivered through the Student Accommodation Masterplan which will invest around £140 million to improve and develop student accommodation in the town and take total University provided residential capacity to the 5,000 target.

A9.38 Compared to other university locations, the quantity of university provided accommodation represents a very high proportion of bed spaces against the overall student population. This, however, requires to be considered in the context of the constrained housing market in St Andrews and pressures from the local community and tourism markets, especially in terms of HMO properties, meaning that available accommodation is at a premium.

A9.39 The University recognises the impact of this growth on the operation of the St Andrews housing market and the acute housing needs of low-income households not just in St Andrews but other areas of Fife. One of the key objectives of the University's

strategy is to fulfil a commitment to the town that wherever possible, modern, university-managed accommodation will be provided for students, to alleviate the pressure on the private housing market in the centre of St Andrews.

Fife College

A9.40 Fife College has multiple campus locations across Fife with the vast majority of their students living in the Fife area. Therefore, they do not have any student accommodation and have confirmed that it's very unlikely there would be a need for this in the future.

Table 14: Fife College Student Numbers Living in Fife

Year	Students living within Fife	Students living outwith Fife	Total
2022	18,630	5,906	24,536

Source: Fife College

Self-Build

A9.41 An [in-house register](#) has recently been developed which holds key information on parties interested in self- or custom-build. The register, which reflects a low demand to date, records details of the applicant, property type, number of units, tenure, proposed use, capacity to deliver and preferred timescale for the project. A dedicated team maintain the register of applicants alongside the register of land available. The team will identify empty public sector land which will be the primary resource to meet demand, ensuring compliance with current legislation and net zero targets. The list of land will be available via on the Council's website.

Affordable Housing Contributions

A9.42 NPF4 Policy 16(e) supports proposals for affordable homes or, where at least 25% of the homes proposed are affordable unless the LDP sets out circumstances or locations where a lower or higher contribution has been justified by evidence. Fife Council has previously published justification for a range of affordable housing percentages to be applied in different parts of Fife in the Affordable Housing Supplementary Guidance 2018. This supplementary guidance currently remains Fife Councils position on the levels of affordable housing which should be provided within Fife. Percentages currently range from 5% to 30%. [Planning Committee \(fife.gov.uk\)](https://www.fife.gov.uk)

Summary of Stakeholder Engagement

HNDA Process

A9.43 In the preparation of Fife's two HNDAs the Housing Market Partnership (HMP) stakeholders for both the Tayside and South East Scotland HNDAs were involved in workshops to consider and discuss the initial default HNDA estimates, the various growth scenarios modelled and the draft NPF4 MATHLR figures proposed by the Scottish Government. This approach to proactive engagement was commended by Homes for Scotland and allowed the informed views of the HMPs to be fed into each HNDA and the Fife Council response to the Draft NPF4 MATHLR. This robust assessment of the HNDAs and the Fife MATHLR figures created confidence in using this data as a firm foundation for starting to calculate the LHLR. Further details on the engagement undertaken on the draft MATHLR and the preparation of the HNDAs can be found in [Engagement on the initial building blocks for the LHLR](#).

LHS Consultation

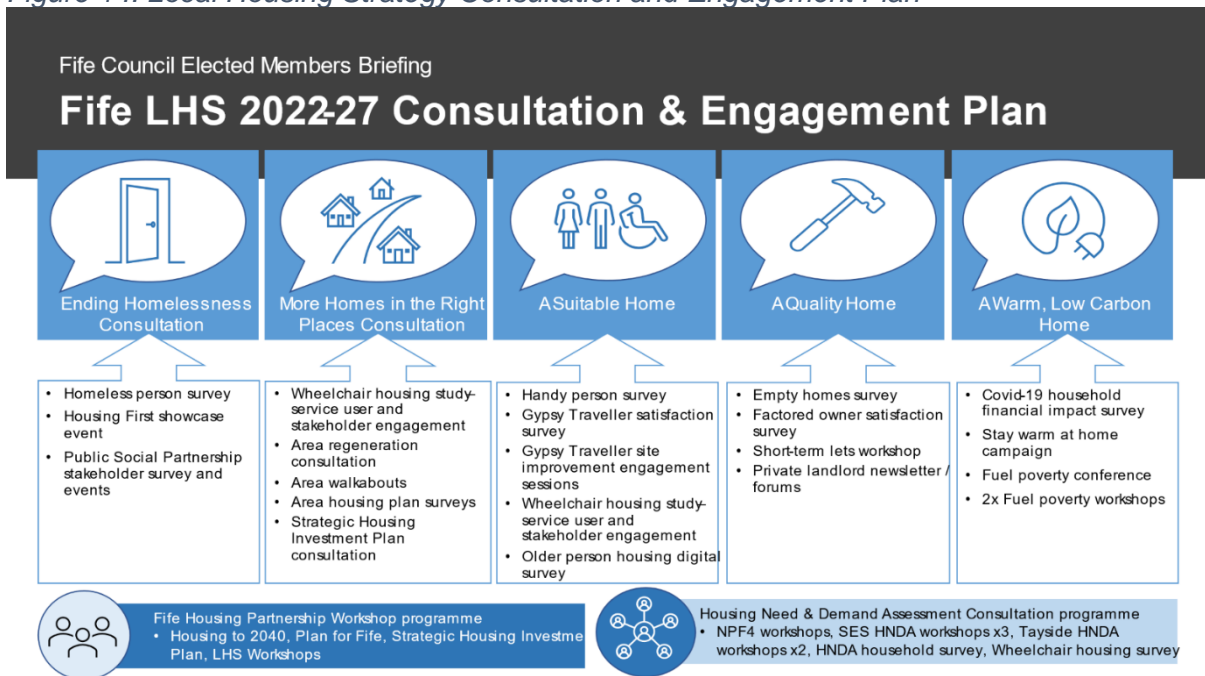
A9.44 Much of the content of this housing need paper is sourced from the LHS. A range of stakeholders were consulted throughout the development of the LHS 2022-2027. Representatives of harder to reach groups have been encouraged to participate throughout the process as well those with protected characteristics. The stakeholders involved are outlined in the table below:

Figure 13: Stakeholders involved in the LHS development

<ul style="list-style-type: none"> • The Scottish Government • Fife RSLs & specialist housing providers • Tenants & Residents • Tenants & Residents Associations & Federations • Private developers • Homes for Scotland • Private owners and landlords • Planning and Building Standards • Fife Housing Association Alliance 	<ul style="list-style-type: none"> • Fife Health & Social Care Partnership • Physical & Learning Disabilities Teams • Older People Team including Delayed Discharge Team • Occupational Therapists • Carers Groups/ Centres • Disabilities Fife • Fife Centre for Equalities • Care & Repair • People First (Scotland) • NHS Fife • Disabled Persons Housing Service Fife 	<ul style="list-style-type: none"> • Housing Options Scotland • Fife Woman's Aid • Housing Support providers / voluntary organisations • Gypsy/Traveller Tenant and Resident Groups • The Showmen's Guild • Armed Forces Covenant Group • SDS Options Fife • Inclusion Scotland 	<ul style="list-style-type: none"> • Cosy Kingdom • Changeworks • Home Energy Scotland • Department for Work and Pensions • Rural Property & Business Association • Scottish Association of Landlords • Fife People's Panel • Citizens Advice and Rights Fife • Homeless charities
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A9.45 Consultation and engagement took the form of a number of different methods:

Figure 14: Local Housing Strategy Consultation and Engagement Plan



Source for Figures 13 & 14: Local Housing Strategy 2022-2027 Consultation Report

A9.46 These events and surveys created a wealth of data and evidence for the preparation of the LHS and LDP.

Have your say on the future of Fife's places Consultation

A9.47 In late 2022 the public were asked by Fife Council what they thought was good and bad about where they lived and the challenges these places face due to things such as the climate emergency and food resilience. The online survey provided an opportunity for people to have their say in helping shape where they live by highlighting the issues that they think need to be tackled by the next Local Development Plan for Fife. The most common issues raised in terms of Housing were in relation to cost and choice with meeting the needs of everyone being the main challenge.

Fife Wheelchair & Specialist Housing Survey

A9.48 Primary research was undertaken via a household survey delivered by Research Resource (a professional market research agency) and was focused on better understanding the profile of existing homes which meet accessible housing standards (particularly in private housing sectors); as well as providing a detailed profile of the population of households with health conditions or disabilities that require accessible housing. The research also assessed the extent to which the population in Fife is adequately housed and the range of solutions that could/should be considered to meet unmet housing needs. A total of 500 telephone interviews were carried out in parallel with an online survey which returned 2,121 valid responses. The telephone survey mirrored the online survey but provided an opportunity to carry out more detailed questioning and data collection.

PAS Gypsy/Travellers

A9.49 Planning Aid Scotland (PAS) was engaged by Fife Council to understand the views and priorities of Gypsies and Travellers and Travelling Showpersons. Engagement took place between February and May 2023 via a programme of face-to-face conversations carried out with individuals, families and wider groups, designed according to the needs and interests of the community. These conversations mainly took place in public sites and at the Links Market and provided a safe and confidential space for members of the community to share their views.

Housing for Further and Higher Education

A9.50 In the preparation of the Evidence Report, both Fife College and the University of St Andrews were asked for, and provided data for, student accommodation needs. This data is highlighted above in this annex. In addition, further detail on the University's growth strategy and existing and future student accommodation provision is outlined in the [St Andrews University Student Accommodation Report](#).

Summary of Implications for the Proposed Plan

A9.51 The two HNDAs for Fife have defined Fife's existing and future housing needs. This has informed and guided the calculation of the indicative Local Housing Land Requirement (LHLR). The Proposed Plan will require to allocate housing sites to satisfy the indicative LHLR.

A9.52 Sites will require to be allocated over a range of geographies and settlements and include a range of site sizes and tenures. However, the Proposed Plan will not just be required to meet the overall LHLR. The LDP will require to consider the different tenure estimates based on existing need and future need following the steady growth scenario (the preferred HNDAs scenario). This estimated need (broken down to housing market area level) will guide and inform the spatial strategy of the Proposed Plan.

A9.53 However, there is also a finer grain to housing need. The research outcomes from the range of studies and data sources identified above have helped develop estimates specialist housing requirements (including wheelchair and accessible homes). This has formed an evidence base for setting tenure specific targets within the LHS and Strategic Housing Investment Plan (SHIP) for future housing delivery. In the preparation of the Proposed Plan, the identification of targets and/or requirements for specific provision through local policy will be considered. Specific site allocations will also be considered where appropriate. The implications to help meet specific local housing needs in Fife are listed below:

Care Homes

A9.54 There is no identified need for additional care homes and future provision will be predominantly market led. Fife Council and the Fife Health & Social Care Partnership will continue to assess the existing and future need for care homes. Depending on the timing of any new proposals, these can be assessed during the preparation of the Proposed Plan as part of the assessment of proposals or, if after the Plan is adopted, will be assessed against the spatial strategy and policies of NPF4 and the LDP.

Specialised Housing Targets

A9.55 The outlined need and targets for wheelchair housing will need to be reviewed and developed further alongside the development of phase 4 of the Affordable Housing Programme and Local Housing Strategy. Working with key partners, Fife Council will look at how policy can be shaped to meet emerging needs. The type of houses delivered by housing providers will also become more important as demographic changes continue. Not only do homes need to be delivered in the right locations

alongside sustainable modes of travel but they need to be built to accessible standards and of the right size to meet the needs identified in the relevant HNDA.

Gypsy/Travellers

A9.56 The Fife Council commissioned research has concluded there is no clear need for additional land to be assigned for public sites. However, the existing sites could benefit from improved facilities and maintenance. This work has already commenced to upgrade the existing facilities.

Housing for Further and Higher Education

A9.57 Student accommodation requires to be considered in the context of the constrained housing market in St Andrews and the pressures from local housing need, student accommodation and tourism. This is especially the case in terms of HMO properties, resulting in available accommodation being at a premium in St Andrews. The LDP requires to address all housing needs for St Andrews and strike a balance between these competing needs. As the Proposed Plan is prepared, further work will be undertaken to determine the most appropriate approach to balancing these issues and needs and the role of development plan policy and specific allocations. It is noted that the University of St Andrews suggest a bespoke policy position for student accommodation in St Andrews is required and that given the lifespan of the LDP, flexibility requires to be built in to respond to changing needs.

Self-Build

A9.58 Through the preparation of the Proposed Plan, the self-build register and the register of available land shall be reviewed to consider demand and available land (predominantly surplus public sector land). This process will inform the spatial strategy and potentially allocations of the Plan.

Affordable housing

A9.59 The overall affordable need has been defined through the HNDAs down to HMA level. Through the preparation of the Proposed Plan, the Planning and Housing Services will assess whether there is a continued justification for local affordable housing percentages in Fife which go to the sub-HMA level. It is expected that this review, using local data, will continue to evidence a lower need for some areas of Fife than that identified in NPF4 (25%). The review shall also consider whether the percentage for St Andrews HMA, currently set at 30%, remains justified.

A9.60 Scottish Government affordable housing funding is likely to reduce and will have serious implications for affordable housing delivery in Fife. The Scottish Government's draft budget announcement in December 2023 stated that Councils should expect a cut of 26% to the support for their Affordable Housing Programmes. This will have a negative impact on the number of new affordable houses Fife Council and the Fife Housing Association Alliance can provide to support homelessness needs and how quickly affordable housing need backlog can be addressed.

A9.61 Fife Council has committed to building a further 1,250 Council houses in Fife over the next five years, as part of the Affordable Housing Programme. Since 2012, Fife has had one of the largest social house-building programmes in Scotland and even the UK, delivering 7,400 houses. Fife's ability to keep building is at risk if this proposed cut is applied to the Affordable Housing budget.

A9.62 At the time of writing (January 2024), Fife Council is seeking urgent support from the Scottish and UK governments to mitigate housing pressures in Fife. Failure to take urgent action will lead to Fife Council having no alternative than to declare a Housing Emergency.

Statements of Agreement/Dispute

A9.63 Fife Council Housing Services have been consulted on this annex and agree with its content.

A9.64 Homes for Scotland received drafts of all the housing annexes for comment. Whilst comments were received, these primarily focussed on the indicative Local Housing Land Requirement annex and technical paper and did not cover the content of this Housing Need annex. No areas of dispute have been raised in relation to this annex.