



WEST LoTHIAN COUNCIL

CORPORATE ASSET MANAGEMENT STRATEGY AND GENERAL SERVICES CAPITAL INVESTMENT PROGRAMME 2026/27 TO 2032/33

REPORT BY DIRECTOR OF FINANCE AND PROPERTY SERVICES

A. PURPOSE OF REPORT

The purpose of this report is to enable the council to agree an updated General Services capital programme for 2026/27 to 2032/33.

B. RECOMMENDATIONS

It is recommended that the Council:

1. Notes the progress achieved to date during the third year of the ten year capital programme;
2. Approves the updated General Services capital programme for 2026/27 to 2032/33, as set out in Appendix 1;
3. Approves the updated capital funding for 2026/27 to 2032/33, as set out in section D.5 of the report;
4. Agrees that officers carry out a review of potential capital resources and future expenditure requirements, taking account of reduced capital grant for 2026/27 and the likelihood that this will continue in future years;
5. Notes the requirements of the CIPFA Prudential Code, as set out in section D.7;
6. Notes the outcome of the Integrated Relevance Assessment;
7. Notes that the reporting and monitoring governance arrangements agreed as part of the Corporate Asset Management Strategy and ten year capital investment programme will continue, including quarterly monitoring reports to Council Executive through which adjustments to the programme may be considered.

C. SUMMARY OF IMPLICATIONS

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| I. Council Values | Caring and compassionate, open, honest and accountable and collaborative, inclusive and adaptive. |
| II. Policy and Legal (including Strategic Environmental Assessment, Equality Issues, Health or Risk Assessment) | <p>The council's General Services capital programme is managed within the stringent requirements set out in the updated Prudential Code. The integrated approach to asset management and capital planning complies with the provisions of the Prudential Code and with the Best Value requirements in the 2003 Local Government (Scotland) Act.</p> <p>Risks in relation to the capital programme will be identified and managed in accordance with the council's corporate approach to risk and risk-based budget monitoring.</p> <p>Strategic Environmental Assessments will be carried out for individual projects as required.</p> |
| III. Implications for Scheme of Delegations to Officers | None. |
| IV. Impact on performance and performance indicators | Effective capital implementation and asset management is vital to supporting corporate and service performance. |

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| V. Relevance to Single Outcome Agreement | Effective prioritisation of resources will be essential to achieve key outcomes over the remainder of the approved capital programme. |
| VI. Resources (Financial, Staffing and Property) | The updated programme is based on estimated resources of £145.714 million which will be reviewed during the course of 2026/27 to ensure the programme remains prudent, affordable and sustainable. |
| VII. Consideration at PDSP | Asset lead officers provide annual asset performance reports to relevant Policy Development and Scrutiny Panels (PDSPs). |
| VIII. Other consultations | Preparation of the 2026/27 to 2032/33 capital investment programme has involved consultation with Depute Chief Executives, Heads of Service, asset lead officers, and capital project managers. |

D. TERMS OF REPORT

D.1 BACKGROUND

On 25 February 2025, Council approved the Corporate Asset Management Strategy and General Services capital investment strategy for the eight year period 2025/26 to 2032/33. The General Services capital programme was then subsequently updated in June 2025 to take account of the 2024/25 capital outturn.

This report details the progress achieved to date in the third year of the ten year capital programme and outlines proposed updates to the detailed budgets for years 2026/27 to 2027/28 of the programme. The proposed programme details investment of £145.714 million across the remaining seven years of the approved capital programme to 2032/33.

D.2 CAPITAL ASSET MANAGEMENT STRATEGY AND APPROACH TO CAPITAL INVESTMENT

The Council's ten year Capital Asset Management Strategy was approved by Council in February 2023 which continued the Council's established and successful approach to asset management.

Within the General Services Capital Programme remit, this continued with four asset categories, Property, Roads and Related Assets, Open Space and Information and Communication Technology (ICT). The vision of the strategy is a statement of intent for how the Council will manage its assets within an environment of constrained capital resources and without spare capacity. A key consideration has been to maximise resources from other areas such as capital receipts and to consider options to reduce the requirement for asset related expenditure, for example by rationalisation and to continue to support community and third sector groups to pursue asset transfers.

Each asset category continues to have its own asset management plan, reported to relevant PDSPs and which provides appropriate structures and governance arrangements to ensure the council's assets are effectively and efficiently utilised to support service delivery.

The Corporate Asset Management Strategy helps to demonstrate best value, continuous improvement, good performance management, partnership working and sustainable development. The Strategy details the well-established performance measures that demonstrate assets are being managed efficiently and effectively. These include ensuring assets comply with statutory and regulatory health and safety requirements, maintaining assets to a satisfactory condition to support service delivery and ensuring assets are fit for purpose. Additionally, making sure assets meet current and expected service demand and ensuring they are used to maximum benefit, while also ensuring assets are as accessible as possible to all services users and finally maintaining assets to ensure maximum operational life and minimising any potential negative impact on the environment.

The approach to developing the long term capital investment programme followed the council's established and successful approach, which is based on an assessment of capital resources available, development of Strategic Outline Business Cases (SOBCs) and a robust options appraisal process.

As reported to Council Executive on 3rd February 2026 as part of the Scottish Budget and Local Government Finance Settlement 2026/27, the Council will receive less capital grant than previously budgeted. Due to the continued uncertainty regarding future capital grant funding, the position will continue to be monitored taking account of future funding announcements at UK and Scottish level. In addition to capital grant, the capital programme is funded by various sources including capital receipts, developer contributions and prudential borrowing.

Due to reductions in the capital grant, resources are constrained and continued revenue pressures also limit the ability to fund additional prudential borrowing. When the reduced resources are matched against needs identified in the Asset Plans it is clear that these are significantly less than required. The Accounts Commission publication "The Scottish Budget 2026/27" reports that capital allocations to councils are to decrease in both cash and real terms between 2025/26 and 2026/27, with 2026/27 capital funding of £681.4 million representing a 14 per cent annual real-terms reduction from initial 2025/26 funding. The Accounts Commission also notes that since 2019/20 there has been a 55% real-terms reduction in the initial capital allocation to councils, with councils reporting that they will struggle to deliver their capital programmes over the next five years. The Commission comments that councils have increasingly relied on borrowing as Scottish Government funding remained constrained, and now this funding will reduce.

As a consequence of the mismatch between needs and resources Asset Lead Officers are developing new approaches to managing assets which needs to consider different approaches to measuring asset life spans. This is required due to the need to continue to keep assets in use longer than expected. A Learning Estate review is underway as part of the update for the Property Asset Management Plan and a review of other asset categories such as synthetic Pitches are also being prepared as Asset Leads seek to match need against resources and current building standards which now incorporate requirements to address Net Zero. This exercise will ultimately be captured by the strategic asset management process and will allow officers to develop plans for members consideration and approval. This longer term planning exercise will seek to look at the future of the estate beyond the current plan which ends in 2032/33 including elements such as the first tranche of Public Private Partnership (PPP) schools which will be handed back to the council in 2032.

D.3 2025/26 GENERAL SERVICES CAPITAL PROGRAMME

Against this backdrop officers have continued to deliver the current 2025/26 programme. The month 6 monitoring exercise forecasts a projected outturn for 2025/26 of £65.420 million. The slippage of £13.906m reported at month 6 does not indicate an underspend or capacity in the programme, rather it reflects changes in the phasing of approved budgets and profiling of payments with projects on track to utilise the full approved budget allocated.

D.4 PROPOSED CAPITAL PROGRAMME – 2026/27 to 2032/33

The capital programme is updated each year to take account of latest circumstances, including available funding. Recognising various changes, as well as the latest estimated phasing for approved projects, the proposed updated investment by asset category for 2026/27 to 2032/33 is as follows:

Table 2: Proposed Capital Programme 2026/27 to 2032/33

Asset Category	2026/27 Proposed Programme £'000	2027/28 Proposed Programme £'000	2028/29 to 2032/33 Proposed Programme £'000	Total Proposed Programme £'000
Property Assets	15,266	32,476	25,820	73,562
Roads & Related Assets	8,150	5,182	24,143	37,475
Open Space Assets	3,528	2,633	13,197	19,358
ICT Assets	2,231	1,433	11,655	15,319
Total	29,175	41,724	74,815	145,714

A detailed analysis of the proposed capital programme for 2026/27 to 2032/33 is provided in Appendix 1, with additional information provided below.

Property Assets

The proposed property budget sets out investment of £73.562 million to 2032/33. The profile reflects updated budget phasing and additional investments following approval at Council Executive.

Between 2026/27 to 2032/33 the current programme includes £22.171 million of investment in Planned Improvements and Statutory Compliance. This includes improvements within the school estate such as roof repairs and improvements within front line buildings such as partnership centres and care homes while also ensuring all buildings remain statutory compliant.

Between 2026/27 and 2032/32 there is £43.818 million of investment in Schools projects which include core and developer funded projects. These include scheduled works including extensions, reconfigurations and adaptations to existing schools as well as the delivery of new schools.

In February 2026, Council Executive approved an additional £1.8 million budget to deliver the Craigshill Primary School project and this has now been included within the revised programme, while there has been some reprofiling of the existing budget to reflect the phasing of payments.

Following confirmation of costs and based on the latest information available to officers, there have been some budget phasing changes relating to temporary unit costs at Calderwood Primary School and also proposed extensions at Winchburgh Primary and Pumpherston/Uphall Station Primary Schools. These changes ensure these developer funded budgets will match spend in the upcoming financial year.

There is investment of £7.573 million in Operational Building projects between 2026/27 and 2032/33, including new investment of £3.118 million in 2026/27 for the replacement Stoneyburn Community Centre which was approved at Council Executive in November 2025. Further, additional budget of £2.165 million has been included in the programme for the Young Persons Supported Accommodation (YPSH) following approval at Council Executive in August 2025.

Budget of £330,000 has also been included for a new purpose built Gymnastics facility within Xcite Bathgate, converting an underutilised sports hall space, which the Council will forward fund. This new space will support West Lothian Leisure's long term financial plan and its transition to operate without a management fee by 2027. The new space will bring benefits to West Lothian young people allowing structured progression from early years to club progression.

Roads and Related Assets

The proposed budget for the Roads and Related Assets category is £37.475 million to 2032/33. Taking account of available resources, the proposed budget will focus on managing as far as possible any deterioration in the condition of the council's road and footway infrastructure.

Within Roads and Footways, there is investment of £12.925 million is proposed over the period 2026/27 to 2032/33. This includes road maintenance across A, B, C and U class roads. In regards to the to the Tier 1 Active Travel Infrastructure fund, which replaced Cycling Walking

Safer Routes (CWSR), there is currently no confirmed funding for this scheme within the 2026/27 settlement. The Scottish Government have clarified that, from 2026/27, the full allocation of any funding will come from the active travel budget rather than the local government settlement and will be paid as a redetermination of the general capital grant. The budget will be updated when we receive confirmation of funding.

Across Flood Prevention, Road Lighting and Structures, there is proposed investment of £20.976 million to 2032/33 with £4.747 million programmed for 2026/27. This includes works to reduce the potential for flooding, investment in LED lighting replacement and also maintenance to ensure the long term durability of the bridge stock as well as ensuring compliance with legislation.

Open Space Assets

The proposed budget for the Open Space Assets category is £19.358 million to 2032/33.

Within Open Space and Sports Facility projects, there is investment of £9.601 million over the seven year period. Funding of £260,000 has been confirmed in the Scottish Budget settlement for 2026/27 for the Nature Restoration Fund (NRF) which will allow officers to continue to progress current multi-year projects.

Open space and sports facility planned improvements includes investment of £2.198 million to 2032/33. This investment will enable park infrastructure and features to be maintained in a fit for purpose condition with required safety repairs carried out, while there is £3.840 million programmed for children's play areas where officers current priorities are to improve accessibility and increase the provision of inclusive play opportunities.

There is investment of £2.490 million to maintain general cemetery infrastructure, including construction of new foundation strips for headstones, maintenance of roads and footpaths, and headstone stabilisation. There has been change in the budget relating to the developer funded Cemetery extensions to reflect the contributions already received and anticipated during the programme. There has also been a change in the phasing of the core cemetery extension budget to reflect work commencing on an extension to Adambrae cemetery in 2026/27 which is nearing capacity.

ICT Assets

There has been no movement to the phasing of approved ICT budgets, with planned investment remaining at £15.319 million to 2032/33. The scheduled programme consists of investment of £8.316 million for corporate and modernisation projects, including central server and storage refresh. This will enable council services to process information and support efficient and effective service delivery.

There is planned investment of £7.003 million in school ICT assets. This includes client device refresh, which covers laptop and desktop devices used by staff and pupils. This investment is an integral part of the school estate and supporting outcomes, including improving attainment.

D.5 CAPITAL FUNDING

Projected capital resources are constrained, with available resources being significantly less than requirements. This is due to various factors including constrained capital grant funding from the Scottish Government, reducing availability of capital receipts and reduced revenue resources to support the cost of prudential borrowing. As noted in the Scottish Budget 2026 and Local Government Finance Settlement 2026/27 report to Council Executive on 3 February 2026, provisional general capital grant for 2026/27 will be £11.340 million, which is £1.660 million less than budgeted in the approved ten year programme for 2026/27.

Based on current public spending assumptions the likelihood is that reduced capital funding could continue on a recurring basis. The Accounts Commission report notes that "alongside its 2026/27 draft budget the Scottish Government published The Scottish Spending Review 2026, which sets out indicative multi-year spending plans up to 2028/29 for revenue spending, and 2029/30 for

capital. All elements of the Scottish Government funding to local government are projected to fall over the spending review period, and both revenue and capital funding are expected to reduce between 2026/27 and 2028/29". This would have a significant impact on the council's capital resource assumptions necessitating a review of expenditure and resources as the programme would no longer be prudent, affordable and sustainable if grant levels reduced on a recurring basis. The position regarding capital grant funding will continue to be monitored taking account of future spending announcements at a UK and Scottish level. This will include the UK Spring Statement on 3 March 2026 and the outcome of the 2026/27 Local Government Finance Settlement.

Current revised capital resources to fund the capital investment programme to 2032/33 is summarised as follows. Resources have been phased to reflect expenditure commitments but also to ensure that capital funding, and the impact on the council's treasury management position, represent best value. Other funding includes grants from bodies other than the Scottish Government, capital funded from current revenue (CFCR) and developer contributions.

Table 3: Proposed Capital Resources 2026/27 to 2032/33

	2026/27 £'000	2027/28 £'000	2028/29 to 2032/33 £'000	Total £'000
Scottish Government Grants	11,890	12,768	71,340	95,998
Capital Fund & Receipts	(10,523)	13,460	(6,358)	(3,421)
Borrowing	19,705	-	-	19,705
Other Funding	8,103	15,496	9,833	33,432
Total Resources	29,175	41,724	74,815	145,714

As noted, capital resources will be kept under review during 2026 to reflect reduced Scottish Government funding and other sources of funding. Resources will continue to be reviewed and phased to reflect both investment requirements and effective treasury management practices. This will minimise the risk of the programme becoming unaffordable, unsustainable or imprudent and will help to make sure that use of capital resources and treasury management activities represent best value for the council.

Due to the challenging financial position, material changes to proposed resources will not be able to be accommodated by additional borrowing. Any material change would therefore result in the projected capital programme becoming unaffordable, meaning compensating reductions to the programme would be required.

D.6 INTEGRATED RELEVANCE ASSESSMENT

Assessing impact is an important part of the public sector's decision making process. It is important in developing any proposal or policy to understand how the needs of different groups and the potential barriers they may face may differ. Integrated Impact Assessment (IIA) is a mechanism which enables the council to consider the needs/barriers and identify any adverse impacts of different groups. Consultation with relevant individuals and groups/representatives is required and it enables the council to:

- Develop appropriate policies and practices based on evidence
- Prevent or mitigate negative impacts
- Be more transparent and accountable
- Meet the council's legal requirements in terms of equality, Human Rights, Socio-economic disadvantage and child poverty

Following the key principles of relevance and proportionality within the Equality Act 2010, Integrated Impact Assessments (IIA) of policies and decisions of the council is a requirement of The Equality Act 2010 (Specific Duties) (Scotland) Regulations 2012. In addition, the Fairer Scotland Duty, part 1 of the Equality Act 2010 places a legal responsibility on the council to pay due regard to how it can reduce inequalities of outcome caused by socio-economic disadvantage, when making strategic decisions. The Consumer Duty, under the Consumer Scotland Act 2020, also requires the council to consider the impact of strategic decisions on consumers with goal of reducing harm and delivering better policy outcomes.

The council has mainstreamed integrated impact assessment into the budget setting process. The assessments enable the council to identify impacts and to consider and develop mitigation measures. They are intended to inform the decision making process by making all relevant information available and not to prevent decisions being taken and implemented. This process also gives us the opportunity to identify and highlight positive impacts.

If during the relevance assessment it is determined that there are issues or concerns in relation to equality, human rights or socio-economic disadvantages then a full IIA will be required. In general, if there are two or more factors highlighted in either the equality or socio-economic disadvantage sections of the relevance assessment form, then a full assessment (stage two) will be required as it indicates that impacts and/or areas for concern have been identified and require further investigation. It is important to note that a review of the screening process can be actioned at any time, especially if new information becomes available or unforeseen consequences arise, projects will be kept under review as they develop. The integrated relevance assessment indicates that a full integrated impact assessment is not required at this point. This will continue to be monitored as projects are developed or situations change.

D.7 THE PRUDENTIAL CODE

The CIPFA Prudential Code for Capital Finance in Local Authorities (the Prudential Code) controls capital spending in a system based on self-regulation by authorities. The key objectives of the Prudential Code are to ensure that capital expenditure plans are affordable, external borrowing is prudent and sustainable and that treasury management decisions are taken in accordance with professional good practice. The Prudential Code requires the council to set a number of prudential indicators for the forthcoming three years.

The Treasury Management Code of Practice and Prudential Code requires councils to prepare a Capital Strategy. The updated Capital Strategy for 2025/26 to 2032/33 was approved by Council on 18 March 2025. The strategy sets out the outcomes and activities to be undertaken to implement the strategy, as well as the performance indicators used to monitor delivery. The annual review will be undertaken and reported to Council for approval on 17 March 2026.

The council's asset management strategy, capital investment strategy and governance arrangements fully comply with the Prudential Code.

D.8 AFFORDABILITY, PRUDENCE AND SUSTAINABILITY

The Prudential Code requires the council to take into account a number of factors when agreeing capital expenditure plans.

In overall terms, it is assessed that the updated capital programme for 2026/27 to 2032/33 is affordable subject to ongoing review of the programme and resources set out in D.5 to reflect potential reduced capital grant funding.

It should be noted however that the Council is at the upper limit of affordability, which means there is no scope for further capacity in the programme and officers have worked to align Council priorities with available resources. Further, although for 2025/26, the Capital programme has shown an increased level of slippage due to budget phasing changes, this is not an indication of an underspend and this does not equate to capacity within the programme.

Noting the above, the programme is currently affordable within the available capital resources and is sustainable in terms of projected borrowing and loans charges and the Council continues to meet the requirements of the Prudential Code.

The revenue implications are incorporated within the revenue budgets for 2026/27 to 2027/28 and loan charge projections continue to indicate the capital programme is prudent and sustainable. All aspects of the programme are geared to securing best value however it may be necessary, on occasion, to re-phase budgets for operational reasons or to ensure best value.

Best Value

The council has continued to build a resilient culture of effective planning and governance, with

strong evidence to demonstrate how the council meets defined best value characteristics. The Best Value Framework has ensured that the council complies with the provisions contained within the Local Government in Scotland Act 2003. The 2003 Act requires the council to:

- secure best value in the performance of its functions;
- balance the quality and cost of the performance of its function and the cost of council services to service users;
- have regard to efficiency, effectiveness, economy and the need to meet equal opportunity requirements in maintaining that balance;
- fully discharge its duty to secure best value in a way which contributes to the achievements of sustainable development.

An updated Best Value Framework was approved by Council Executive in February 2022. The delivery of the capital programme will be undertaken in compliance with the Best Value Framework. The methodology adopted by the council to integrate capital planning with asset management ensures best value is at the forefront of the development process. In addition, all aspects of the delivery of the capital programme and asset management strategy will be geared to securing best value. The key objective to the integrated approach is to ensure the deployment of fit for purpose assets that support service delivery and targets capital investment where benefits can be maximised. The asset management and capital programme will ensure that available resources are appropriately allocated to priorities.

D.9 RISK MANAGEMENT AND UNCERTAINTIES

The General Services Capital Programme was updated in June 2025 to take account of the 2024/25 outturn position, latest circumstances and funding information. Projected capital resources are constrained, with available resources being significantly less than requirements, due to various factors including constrained capital grant funding from the Scottish Government, reducing ability to generate capital receipts as the most valuable and marketable assets are sold and reduced revenue resources to support the cost of prudential borrowing. Officer will continue to coordinate work on capital planning and asset management, managing risks and uncertainties such as market capacity and inflationary pressures through ongoing monitoring and control arrangements. This ensures a focus on delivery of the programme within approved budgets and timescales.

D.10 GOVERNANCE OF THE CORPORATE ASSET MANAGEMENT STRATEGY AND CAPITAL INVESTMENT STRATEGY

The Corporate Asset Management Strategy and capital investment programme provides a strategic framework for securing best value in the use of the council's capital resources to support asset infrastructure. Council, in February 2024, approved the following governance arrangements to ensure that the strategy is translated into ongoing delivery at operational level:

- a monthly risk-based exercise to monitor progress;
- quarterly monitoring reports to the Council Executive outlining progress;
- annual reports to Local Area Committees;
- reports to PDSPs on asset management performance plans for the six asset categories.

E. CONCLUSION

This report sets out the main achievements to date in the third year of the ten year capital programme. Proposed amendments to the detailed phasing of budgets reflect the current circumstances and information. Council is asked to approve the proposed amendments to the General Services capital programme for 2026/27 to 2032/33 and the updated resources.

F. BACKGROUND REFERENCES

Corporate Asset Management Strategy and General Services Ten Year Capital Investment Strategy 2025/26 to 2032/33 – Report by Head of Finance and Property Services to Council 25 February 2025

General Services Capital Investment Programme 2025/26 to 2032/33 - Update - Report by Head of Finance and Property Services to Council Executive 24 June 2025

2025/26 General Services Capital Budget – Month 6 Monitoring Report - Report by Director of Finance and Property Services to Council Executive 11 November 2025

Appendices/Attachments: Appendix 1 – General Services Capital Programme 2026/27 to 2032/33
Appendix 2 – Consumer Duty Impact Assessment

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24 February 2026

DATA LABEL: PUBLIC

GENERAL SERVICES CAPITAL INVESTMENT STRATEGY - 2026/27 TO 2032/33

Asset Type	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/31 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
<u>Property Assets</u>								
Planned Improvements and Statutory Compliance	3,280	3,262	3,127	3,127	3,127	3,127	3,121	22,171
Property Projects	11,986	29,214	9,471	180	180	180	180	51,391
Property Assets - Total	15,266	32,476	12,598	3,307	3,307	3,307	3,301	73,562
<u>Roads and Related Assets</u>								
Roads and Footways	2,759	1,164	1,783	1,783	1,813	1,813	1,810	12,925
Roads Projects	644	480	480	480	480	505	505	3,574
Flood Prevention and Drainage	1,969	256	176	176	176	176	176	3,105
Road Lighting	1,582	1,295	1,295	1,295	1,295	1,295	1,295	9,352
Structures	1,196	1,987	974	1,060	1,062	1,120	1,120	8,519
Roads and Related Assets - Total	8,150	5,182	4,708	4,794	4,826	4,909	4,906	37,475
<u>Open Space Assets</u>								
Open Space and Sports Facility Projects	1,534	1,344	1,344	1,344	1,344	1,346	1,345	9,601
Open Space and Sports Facility Planned Improvements	314	314	314	314	314	314	314	2,198
Children's Play Areas	540	540	552	552	552	552	552	3,840
Synthetic Turf Pitches	180	180	180	180	180	180	149	1,229
Cemeteries	960	255	255	255	255	255	255	2,490
Open Space Assets - Total	3,528	2,633	2,645	2,645	2,645	2,647	2,615	19,358
<u>ICT Assets</u>								
Corporate and Modernisation	1,106	660	1,310	1,310	1,310	1,310	1,310	8,316
School Investment	1,125	773	1,038	1,038	1,009	1,010	1,010	7,003
ICT Assets - Total	2,231	1,433	2,348	2,348	2,319	2,320	2,320	15,319
CAPITAL INVESTMENT STRATEGY - TOTAL	29,175	41,724	22,299	13,094	13,097	13,183	13,142	145,714

PROPERTY ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

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	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/31 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
Planned Improvements and Statutory Compliance								
School General Planned Improvements								
Building Fabric School Estate	100	100	360	360	360	360	360	2,000
Mechanical & Engineering School Estate	155	200	300	300	300	300	300	1,855
Electrical Upgrade - St Mary's PS, Polbeth	100	110	40	40	40	40	40	410
Roof Replacement & Repair - Inveralmond High School, Livingston	385	0	0	0	0	0	0	385
Roof Replacement & Repair - Linlithgow Academy	0	350	0	0	0	0	0	350
School - Total	740	760	700	700	700	700	700	5,000
Admin, Service Centres and Partnership Centres Planned Improvements & Replacements								
Building Fabric Admin Buildings, Service Centres & Partnership Centres	100	100	100	100	100	100	100	700
Mechanical & Engineering Admin Buildings, Service Centres & Partnership Centres	100	100	100	100	100	100	100	700
West Calder Community Centre - electrical works	18	0	0	0	0	0	0	18
Admin, Service Centres and Partnership Centres - Total	218	200	200	200	200	200	200	1,418
Social Policy Planned Improvements & Replacements								
Building Fabric Social Policy	70	70	55	55	55	55	55	415
Mechanical & Engineering Social Policy	45	45	40	40	40	40	40	290
Social Policy - Total	115	115	95	95	95	95	95	705
TNRP Planned Improvements & Replacements								
TNRP - compliance programme	70	70	55	55	55	55	55	415
TNRP - planned improvements programme	20	20	20	20	20	20	20	140
TNRP - planned mechanical & engineering improvements programme	70	70	70	70	70	70	70	490
Tenanted Non Residential Properties Planned Maintenance - Total	160	160	145	145	145	145	145	1,045
Estate Wide Planned Improvements								
Below Ground Drainage Upgrade Programme	85	85	85	85	85	85	85	595
Boundary Walls & Fences Replacement Programme	50	50	50	50	50	50	50	350
Door Access Upgrades	25	25	25	25	25	25	25	175
Essential Swimming Pool Planned Programme	15	15	15	15	15	15	15	105
Heavy Catering Equipment Replacement Programme	185	185	185	185	185	185	185	1,295
Property Asset Information Programme	150	150	150	150	150	150	150	1,050
Sports Pitch Lighting Replacement Programme	35	35	35	35	35	35	35	245
Wedding Venue Refresh	20	0	0	0	0	0	0	20
Estate Wide Planned Improvements Total	565	545	545	545	545	545	545	3,835

PROPERTY ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

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	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/31 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
General Statutory Compliance								
Accessible Facilities for People with Disabilities	110	110	110	110	110	110	104	764
Air Quality	100	100	80	80	80	80	80	600
Asbestos Management	110	110	110	110	110	110	110	770
Automatic Doors, Roller Shutters & Movable Partition	91	91	91	91	91	91	91	637
Chimney, High Level Masonry & Lightning Conductors Inspection Programme	120	120	120	120	120	120	120	840
Control of Legionella	147	147	122	122	122	122	122	904
Electricity at Work	150	150	150	150	150	150	150	1,050
Emergency Lighting	130	130	130	130	130	130	130	910
Energy Legislation Compliance	15	15	19	19	19	19	19	125
Fire Safety Risk Assessment Programme	247	247	247	247	247	247	247	1,729
Gas Pipeline Safety	15	15	15	15	15	15	15	105
Hazardous Substances Detection	15	15	15	15	15	15	15	105
Lift Upgrade Programme	70	70	70	70	70	70	70	490
Pressure Vessels	32	32	33	33	33	33	33	229
Residual Current Device Testing	25	25	25	25	25	25	25	175
Safe Access to Roof & Roof Voids	25	25	25	25	25	25	25	175
Structural Inspection Programme	70	70	70	70	70	70	70	490
Water Quality & Hydrants	10	10	10	10	10	10	10	70
Statutory Compliance - Total	1,482	1,482	1,442	1,442	1,442	1,442	1,436	10,168
Planned Improvements and Statutory Compliance - total	3,280	3,262	3,127	3,127	3,127	3,127	3,121	22,171
<u>Property Projects</u>								
Schools								
East Calder PS	500	0	0	0	0	0	0	500
Learning Estate Investment – Craigshill (SG Grant/Prudential Borrowing)	1,800	11,000	0	0	0	0	0	12,800
RAAC Roof Replacement & Repair - St Kentigern's Academy, Blackburn	2,722	0	0	0	0	0	0	2,722
Schools General Projects - Total	5,022	11,000	0	0	0	0	0	16,022
Schools Projects - Developer Funded								
Blackridge PS – internal reconfiguration post extension (Developer Contribution)	0	100	0	0	0	0	0	100
Calderwood PS, East Calder - third stream (Developer Contribution)	100	100	868	0	0	0	0	1,068
Existing Winchburgh PS - extension (Developer Contribution)	100	3,163	0	0	0	0	0	3,263
Livingston Village PS - extension (Developer Contribution)	83	0	0	0	0	0	0	83
New Non Denominational PS Bangour (Developer Contribution)	2,721	9,750	8,423	0	0	0	0	20,894
Pumpherstons/Uphall Station PS - extension (Developer Contribution)	200	2,188	0	0	0	0	0	2,388
Schools Projects - Developer Funded - Total	3,204	15,301	9,291	0	0	0	0	27,796
Operational Buildings								
Homelessness - Young Persons Accommodation	2,165	0	0	0	0	0	0	2,165
Stoneyburn Community Centre	1,085	2,033	0	0	0	0	0	3,118
West Lothian Leisure Landlord Maintenance	180	180	180	180	180	180	180	1,260
Xcite Bathgate Arena Conversion (WLL)	330	0	0	0	0	0	0	330
Winchburgh Community Facilities (Developer Contribution)	0	700	0	0	0	0	0	700
	3,760	2,913	180	180	180	180	180	7,573
TOTAL PROPERTY ASSETS	15,266	32,476	12,598	3,307	3,307	3,307	3,301	73,562

ROADS AND RELATED ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/21 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
<u>Roads and Footways</u>								
A Class Roads								
Maintenance of A Class Roads	20	5	362	362	362	362	362	1,835
A801 - Boghead Roundabout	130	0	0	0	0	0	0	130
A801 - Heatherfield to Westfield Roundabout	51	0	0	0	0	0	0	51
A801 - Westfield R/A to A706 (Avon Gorge)	150	0	0	0	0	0	0	150
A89 - South Middleton	220	0	0	0	0	0	0	220
A899 - Goschen Place, West Main Street (Broxburn)	0	154	0	0	0	0	0	154
A Class Roads - Total	571	159	362	362	362	362	362	2,540
B Class Roads								
Maintenance of B Class Roads	50	46	238	238	268	268	268	1,376
B7015 - Main Street, East Calder	105	0	0	0	0	0	0	105
B8046 - Calder Park Road	0	105	0	0	0	0	0	105
B8084 - North Street, Armadale	63	0	0	0	0	0	0	63
B9080 - Winchburgh Main Street to Council Boundary	137	0	0	0	0	0	0	137
B Class Roads - Total	355	151	238	238	268	268	268	1,786
C Class Roads								
Maintenance of C Class Roads	12	17	299	299	299	299	299	1,524
C17 - Bathgate to Linlithgow	37	80	0	0	0	0	0	117
C21 - Burnhouse Road to Craigbank	0	56	0	0	0	0	0	56
C31 - West Mains Cottage to West Mains	97	0	0	0	0	0	0	97
C31 - Bank Park to U42	0	133	0	0	0	0	0	133
C31 - U42 to Baads Mill to Bank Park	175	0	0	0	0	0	0	175
C Class Roads - Total	321	286	299	299	299	299	299	2,102
U Class Roads								
Maintenance of U Class Roads	20	41	645	645	645	645	645	3,286
Bathville Business Park, Armadale	0	80	0	0	0	0	0	80
Bridge Street & Greenburn Road (Fauldhouse)	0	67	0	0	0	0	0	67
Drumshoreland Road	129	0	0	0	0	0	0	129
Edinburgh Road, Bathgate - Station to Guildiehaugh	154	0	0	0	0	0	0	154
Howden South Road (Junction from Almondvale E Rd. to Asda Rbt)	160	0	0	0	0	0	0	160
Huron Avenue, Livingston	120	0	0	0	0	0	0	120
Majoribanks Street, Bathgate	40	0	0	0	0	0	0	40
Shanks Road, Whitburn	0	66	0	0	0	0	0	66
U21 Hens Nest Road (From Blackburn to Bents)	175	0	0	0	0	0	0	175
U22 - A706 at Longridge to B792	299	0	0	0	0	0	0	299
Williamston Interchange Slips	165	0	0	0	0	0	0	165
U Class Roads - Total	1,262	254	645	645	645	645	645	4,741

ROADS AND RELATED ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/21 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
Adopted Footpaths								
Maintenance of Footways, Footpaths & Cycleways	34	24	145	145	145	145	145	783
Loan Path, Livingston	56	0	0	0	0	0	0	56
67 - 85 Pumpherston Road	15	0	0	0	0	0	0	15
Knightsridge East Road Footpath next to Moss Wood	0	32	0	0	0	0	0	32
Craig Avenue, Whitburn. Inline path from flats 2 to 60.	0	19	0	0	0	0	0	19
Deans, Nellburn footpath at Deans Rd North Underpass	0	21	0	0	0	0	0	21
South Street, Armadale from Mount Pleasant to Cross	0	29	0	0	0	0	0	29
East Main Street, Uphall - footpath at Oakridge Hotel	56	0	0	0	0	0	0	56
	161	125	145	145	145	145	145	1,011
Non Adopted Roads								
Maintenance of Non-Adopted Roads	0	0	40	40	40	40	40	200
School Playground & Car Park Resurfacing	6	17	34	34	34	34	31	190
Armadale partnership centre car park	38	0	0	0	0	0	0	38
Stoneyburn Primary School Car Park	25	0	0	0	0	0	0	25
Xcite Bathgate Car Park	0	42	0	0	0	0	0	42
Connolly School Campus, Blackburn - school playground	0	110	0	0	0	0	0	110
	69	169	74	74	74	74	71	605
	20	140						
Roads and Footways - Total	2,759	1,164	1,783	1,783	1,813	1,813	1,810	12,925
<u>Roads Projects</u>								
Disabled Person's Parking	36	36	36	36	36	35	35	250
Road Casualty Reduction Schemes	335	200	200	200	200	200	200	1,535
Traffic Signal Improvements – junctions	152	154	154	154	154	180	180	1,128
Traffic Signal Upgrade – pedestrian/cycle crossings	90	90	90	90	90	90	90	630
Transport Scotland Act Pavement Parking Prohibitions	31	0	0	0	0	0	0	31
Roads Projects - Total	644	480	480	480	480	505	505	3,574
<u>Flood Prevention and Drainage</u>								
Adapting to a Changing Climate – water related infrastructure	40	40	40	40	40	40	40	280
Local Flood Risk Management Plan Implementation for Cycle 2	200	200	120	120	120	120	120	1,000
Beebraigs Reservoir	16	16	16	16	16	16	16	112
Broxburn Flood Prevention Scheme	1,713	0	0	0	0	0	0	1,713
Flood Prevention and Drainage - Total	1,969	256	176	176	176	176	176	3,105

ROADS AND RELATED ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/21 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
Road Lighting								
Maintenance of Street Lighting	256	1,235	1,235	1,235	1,235	1,235	1,235	7,666
Brucefield Industrial Estate, Brucefield, Livingston	529	0	0	0	0	0	0	529
Forkneuk Road / Station Road - Uphall	144	0	0	0	0	0	0	144
LoganWay / Graham Way - Knightsridge	217	0	0	0	0	0	0	217
Moncrieff Way / Morrison Way - Knightsridge	200	0	0	0	0	0	0	200
Pyothall / Port Buchan / Union Rd / Kirkhill Rd / Holygate Pl / New Holygate - Broxburn	132	0	0	0	0	0	0	132
A801 Boghead to Pottishaw Roundabout - Bathgate	44	0	0	0	0	0	0	44
Road Traffic Signs – lit & unlit	60	60	60	60	60	60	60	420
Road Lighting - Total	1,582	1,295	1,295	1,295	1,295	1,295	1,295	9,352
Structures								
Almond Valley Bridge North - water proofing & concrete repairs	0	1,327	0	0	0	0	0	1,327
Bridges & Roads Related Structures – lifecycle & backlog maintenance	0	0	714	820	952	1,010	1,010	4,506
Cauld Burn Bridge	0	80	0	0	0	0	0	80
Cuthill Bridge - painting	250	0	0	0	0	0	0	250
Glenlea Bridge Cottage - repair works	0	150	0	0	0	0	0	150
Guildiehaugh Railway Bridge, Bathgate - waterproofing	0	250	0	0	0	0	0	250
Hospital Interchange - parapets replacement	0	0	130	0	0	0	0	130
Houston Interchange - concrete repairs	466	0	0	0	0	0	0	466
Kinnenhill Bridge	200	0	0	0	0	0	0	200
Moss Interchange - parapets replacement	0	0	20	130	0	0	0	150
Principal Inspections	30	30	30	30	30	30	30	210
Scour Assessments	50	50	80	80	80	80	80	500
Structural Reviews & Assessment	0	50	0	0	0	0	0	50
Swineabbey Bridge - joint & concrete repairs	150	0	0	0	0	0	0	150
Underpass Refurbishments	50	50	0	0	0	0	0	100
Structures - Total	1,196	1,987	974	1,060	1,062	1,120	1,120	8,519
TOTAL ROADS AND RELATED ASSETS	8,150	5,182	4,708	4,794	4,826	4,909	4,906	37,475

OPEN SPACE ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/31 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
Open Space and Sports Facility Projects								
Adapting to Climate Change	27	27	27	27	27	27	27	189
Ash Dieback	400	400	400	400	400	400	400	2,800
Country Parks	64	64	64	64	64	64	64	448
Ecology & Biodiversity Programme	66	66	66	66	66	66	66	462
Nature Restoration Fund	260	0	0	0	0	0	0	260
MUGAs, Kick Pitches & Skate Parks - maintenance	131	201	200	200	200	201	201	1,334
Non-Adopted Hard Landscaping Areas	18	18	18	18	18	19	19	128
Public Art Programme (Developer Funded)	70	70	87	87	87	87	87	575
Rural Paths	125	125	125	125	125	125	125	875
Sustainable Management of Trees & Woodland	160	160	156	156	156	156	155	1,099
Waste Collection Containers – cyclical replacement	170	170	170	170	170	170	170	1,190
Waste Disposal Containers – cyclical replacement	43	43	31	31	31	31	31	241
Open Space and Sports Facility Projects - Total	1,534	1,344	1,344	1,344	1,344	1,346	1,345	9,601
Open Space and Sports Facility Planned Improvements								
Open Space Planned Improvements	314	314	314	314	314	314	314	2,198
Open Space and Sports Facility Planned Improvements - Total	314	2,198						
Children's Play Areas								
Refurbishment of Children's Play Areas (Core)	420	420	432	432	432	432	432	3,000
Refurbishment of Children's Play Areas (Developer Contribution)	120	120	120	120	120	120	120	840
Children's Play Areas - Total	540	540	552	552	552	552	552	3,840
Synthetic Turf Pitches								
Synthetic Turf Pitches	180	180	180	180	180	180	149	1,229
Synthetic Turf Pitches - Total	180	180	180	180	180	180	149	1,229
Cemeteries								
Cemeteries	200	200	200	200	200	200	200	1,400
Proposed Cemetery Extensions (Core)	400	0	0	0	0	0	0	400
Proposed Cemetery Extensions (Developer Contribution)	360	55	55	55	55	55	55	690
Cemeteries - Total	960	255	255	255	255	255	255	2,490
TOTAL OPEN SPACE ALLOCATION	3,528	2,633	2,645	2,645	2,645	2,647	2,615	19,358

ICT ASSETS - CAPITAL INVESTMENT STRATEGY 2026/27 to 2032/33

	Budget 2026/27 £'000	Budget 2027/28 £'000	Budget 2028/29 £'000	Budget 2029/30 £'000	Budget 2030/31 £'000	Budget 2031/32 £'000	Budget 2032/33 £'000	Total Budget £'000
Corporate and Modernisation								
Break/Fix Fund	300	300	500	500	500	500	500	3,100
Central Server - refresh	190	90	160	160	160	160	160	1,080
Central Storage - refresh	0	0	100	100	100	100	100	500
Client Devices - refresh	35	25	180	180	180	180	180	960
Electronic Document Record Management (EDRM) - upgrade & maintenance	141	0	73	73	73	73	73	506
Library Book Fund	95	95	95	95	95	95	95	665
Local Area Network - refresh	150	150	117	117	117	117	117	885
Scottish Wide Area Network (SWAN) - refresh	195	0	0	0	0	0	0	195
Upgrade from Windows 10	0	0	85	85	85	85	85	425
Corporate and Modernisation - Total	1,106	660	1,310	1,310	1,310	1,310	1,310	8,316
Schools								
Education Client Devices - refresh	350	350	350	350	350	350	350	2,450
Education Local Area Network - refresh	450	98	350	350	350	350	350	2,298
Education Network Security Devices	178	178	178	178	149	150	150	1,161
Education Server - refresh	0	0	40	40	40	40	40	200
Smartboard Secondary Schools	147	147	120	120	120	120	120	894
Schools - Total	1,125	773	1,038	1,038	1,009	1,010	1,010	7,003
TOTAL ICT ALLOCATION	2,231	1,433	2,348	2,348	2,319	2,320	2,320	15,319

DATA LABEL: PUBLIC

Appendix 2 – General Services Capital Programme – Consumer Duty Impact Assessment

This statement sets out the steps taken by West Lothian Council to comply with the requirements of Section 21 of the Consumer Scotland Act 2020 when preparing the Council's General Services Revenue and Capital budgets for 2026/27 and 2027/28.

Stage	Tasks	Outcome
Planning (1)	Decide if this is a strategic decision or not. If not, then proceed to stage 5	This is a Strategic Decision by West Lothian Council. Both the General Services revenue and capital budgets are presented by officers for agreement by West Lothian Council.
	Decide if the strategic decision will impact on consumers. If not, then proceed to stage 5	The budgets, if approved, are likely to have impacts on consumers.
	If this is a strategic decision, that will have an impact on consumers, then develop a plan for how to complete stages 2-5 , including required consumer engagement	Stage 2 to 5 have been completed and are detailed in the template below.
	Understand the aims and outcomes of the proposal and identify alternative options	<p>The aim and outcomes of the budgets are set out in the report to West Lothian Council. The overarching aims of the revenue budget are to meet the statutory duty to deliver a balanced budget and to deliver statutory, and where appropriate non-statutory duties within the available budget. Constraints on the funding available to the council in setting its budget and demographic and legislative changes inevitably means that not all services which have previously been delivered will continue to be delivered and those which continue to be delivered, may have to be delivered in a different way. As such the budget is likely to have impacts on users of these services.</p> <p>For the capital budget the approach to developing the long term capital investment programme follows the council's established and successful approach, which is based on an assessment of capital resources available, development of Strategic Outline Business Cases (SOBCs) and a robust options appraisal process.</p>

Stage	Tasks	Outcome
<p>Evidence gathering (2)</p>	<p>Sufficient evidence gathered to answer:</p> <ul style="list-style-type: none"> • What is the proposal trying to achieve? • What are the impacts on consumers, if any? • What are the impacts, if any, on consumers in vulnerable circumstances? • Is it likely that harm will be experienced by consumers as a result of this proposal? • What alternative proposals are there that can improve outcomes for consumers and/or reduce harm to consumers? • How do these alternative proposals compare to the original proposal? • Has your engagement with consumers established any themes you hadn't previously considered? 	<p>West Lothian Council is, by law, required to set a balanced revenue budget on an annual basis. The budget presented to West Lothian Council for consideration seeks to satisfy that legal requirement and also sets a draft budget for the following year 2027/28.</p> <p>The revenue budget for 2027/28 will have to be reviewed at this stage next year to have regard to available funding (the budget assumes a freeze in the local government finance settlement) and a range of other costs but these need to be reviewed against actuals at the time. It also has to be assessed against priorities and circumstances at the time of reviewing that budget. Council tax levels also have to be set annually by law.</p> <p>For 2026/27, the council will receive less capital grant than previously budgeted with the Scottish Government's general capital grant being broadly flat in real terms over coming years. Noting this, the recent Accounts Commission report identifies that <i>"Councils report that they will struggle to deliver their capital programmes over the next five years. They have increasingly relied on borrowing as Scottish Government funding remained constrained, and now this funding will reduce"</i>.</p> <p>Due to the continued uncertainty regarding future capital grant funding, the position will continue to be monitored taking account of future funding announcements at UK and Scottish level.</p> <p>Doing nothing is not an option for the council as it will have insufficient funding to continue to deliver the services that have been delivered in the past. The council will be unable to set a balanced budget without changing service delivery.</p> <p>The revenue budget details intended spending across the full range of services delivered by the council. In setting the budget for 2026/27 and 2007/28, a shortfall of £18.9 million has been identified being the gap between the council's expected income for the period against its current obligations. The shortfall has to be addressed by changing the scope of services delivered by the council and revising the way they are delivered.</p> <p>Each of the saving proposals set out in the revenue budget report have been assessed for their impact on consumers. A number of impacts, or potential impacts, have been identified and where impacts have been identified specific impact assessments have been undertaken. In particular, impacts have been identified in the following savings proposals:</p>

Stage	Tasks	Outcome
		<ul style="list-style-type: none"> - For the education proposals potential impacts have been identified on users of the service including children and parents/carers together with potential impacts on commissioned partner providers, some of who will be small or medium sized businesses. - Potential impacts on users of the council’s pest control service depending on the agreed means of achieving the budget saving. The impact will be fully assessed as necessary during the development of the proposal. - Potential impacts on users of the council’s planning service depending on the agreed means of achieving the budget saving. The impact will be fully assessed as necessary during the development of the proposal. - For the realignment of sports coordinator resource proposal, impact on users of the service including children and parents/carers has been identified. - A potential impact on council staff through extending the employee benefit salary sacrifice scheme. - An impact on consumers as a result of workforce modernisation in libraries and Customer Information services (CIS) through rationalisation of opening hours. - An impact on consumers through moving from broadcasting council committee meetings online to providing public access only at physical meeting venue. <p>These impacts were detailed in specific Consumer Impact Assessments which were presented to relevant Policy Development and Scrutiny Panels for consideration prior to the revenue budgets being presented to West Lothian Council. The details of the assessments can be accessed via the council’s online committee site through the following links:</p> <p>Education PDSP: West Lothian Council Committee Information - Submission Documents</p> <p>Public and Community Safety PDSP: West Lothian Council Committee Information - Submission Documents</p> <p>Economy, Community Empowerment & Wealth Building PDSP: West Lothian Council Committee Information - Submission Documents</p> <p>Environment & Sustainability PDSP: West Lothian Council Committee Information - Submission Documents</p> <p>Corporate Policy and Resources PDSP: West Lothian Council Committee Information - Submission Documents</p> <p>Social Work and Health PDSP: West Lothian Council Committee Information - Submission Documents</p>

Stage	Tasks	Outcome
		<p>The impact assessments for these proposals identify the impact, or potential impact and, where possible, the mitigation and alternative actions which have been considered to address these impacts. The means of achieving the required budget savings have, in many cases, not been fully developed and consequently consideration of impacts will, in such cases, be an iterative process. Where appropriate, individual impact assessments undertaken in respect of savings proposals will be reviewed and updated should the savings option be agreed by West Lothian Council.</p> <p>There is no alternative to the council setting a balanced budget – this is a legal requirement. However, there are alternative means of achieving the necessary savings. The options for doing this were set out in an extensive consultation with consumers.</p> <p>In June 2022 the Council Executive approved a three stage West Lothian (WL) 2028 Your Council, Your Say public consultation approach. Phase 1 and 2 of the consultation were undertaken in 2022 with the results reported to Council Executive in 2022 and individual PDSPs in early 2023. In the first two phases 7,605 responses and over 36,000 comments were received.</p> <p>The results of Phase 1 helped inform the Corporate Plan, approved by Council in May 2023, and Phase 2 helped inform the five-year financial strategy approved by Council in February 2023</p> <p>The approach agreed by Council Executive in June 2022 included a further phase of consultation focusing on savings options for 2026/27 and 2027/28. Council Executive agreed on 26 June 2024 that Phase 3 of the public consultation be rescheduled to 2025 to allow a review of the council’s operating model to ensure it aligns with agreed priorities and statutory obligations, whilst identifying savings to address the remaining budget gap. The re-phasing of the third strand of the consultation to Autumn 2025 was done to provide some further time to understand the impact of risks that may crystallise in areas such as pay awards, Scottish Government funding for teachers and national insurance and inflation. On 14 October 2025, Council Executive agreed an engagement process and timescales associated with Phase 3 of the consultation. The consultation commenced on 16 October and closed on 16 November 2025. The Phase 3 consultation included 48 officer options, grouped under five themes. The council used a wide range of consultation methods to promote the consultation and engage with customers, staff and partners with 10,051 responses being received</p>

Stage	Tasks	Outcome
		<p>Every one of these responses have been considered by senior managers in the council with responses to the comments informing the budget setting process. Where alternative means of achieving savings have been identified these have been considered by senior officers and have informed recommendation in the budget report.</p> <p>It should, however, be noted that some saving options continue to require further consideration, including the detailed means of implementation and, as such, the consideration of impacts will continue to be an iterative process. Impact assessments undertaken in respect of individual savings measures will, where appropriate, be reviewed and updated as the process progresses.</p> <p>Engagement with consumers has not identified any themes which have not previously considered by the council. However, it has identified a number of potential additional options for achieving the required budget savings. These options have not been fully investigated at this stage but will be considered as part of ensuring the council's ongoing financial sustainability.</p>
	Identify and fill any gaps in evidence to answer questions above	The council considers that the engagement with consumers has provided a sufficient understanding of the impact (subject to the point above about it being an iterative process) and no gaps have been identified at this stage.
Assessment and improvement of proposal (3)	Consider answers to stage 2 to assess the impact of the strategic decision on consumers	The impact assessments carried out for the savings options suggest that there will be some impacts arising from the revenue budget savings proposed. However, the council budget for will continue to deliver investment in services of over £635 million in 2026/27 and over £644 million in 2027/28. Projected capital investment over the period to 2032/33 is £145.7 million, subject to a review to incorporate the implications of reduced Scottish Government grant funding. These budgets are focused on providing a wide range of support with the prioritisation of support having been informed by a range of factors aimed at assessing priority need, including the wide ranging consultation undertaken in advance of budget setting.
	Consider if any improvements need to be made to the initial proposal in light of findings of impact on consumers	Where improvements are needed these are identified in the assessment for each of the savings measure considered necessary to balance the budget. Links to the savings based impact assessments are provided in Section 2 above.
	Consider if any further consumer engagement is necessary	As set out above, the detail of some of the proposed savings are not fully developed and there will be an iterative consideration of impact as they are developed. Impact assessments will be updated, as appropriate, as these processes progress and further engagement will be undertaken where considered necessary.

Stage	Tasks	Outcome
<p>Decision (4)</p>	<p>Consider the findings of previous stages and agree any changes to the proposal</p>	<p>In the process of preparing the proposed revenue and capital budgets, and considering the impact on consumers of proposed changes, the council has had regard to the impact of the budget on consumers and it has had regard to the desirability of reducing harm to consumers.</p>
	<p>Document clearly how you have met the consumer duty:</p> <ul style="list-style-type: none"> • The impact of the strategic decision on consumers and the desirability of reducing harm to consumers have been considered throughout the process • That an outcomes-based approach has been taken to achieve the best outcomes for consumers. 	<p>The budget reports describe the benefits which will arise for consumers from a revenue budget of £636.5 million for 2026/27, including time limited investment, and an updated capital investment strategy to 2032/33.</p> <p>The implementation of savings measures to ensure compliance with statutory duty to deliver a balance budget will, however, have impacts on consumers.</p> <p>Whilst the council has sought to negate impacts where possible, the level of savings required could not be achieved absent some impacts on consumers given the customer centric focus of council activities. Consequently, the council has sought to consider and understand the relative impact on consumers and any means of mitigating them</p> <p>The council is satisfied that it has had regard to the desirability of reducing harm to consumers when making these decisions but similarly, it recognises that harm will not be avoidable in all cases. Mitigation measures have been considered and will be implemented to reduce harm where appropriate.</p>
<p>Publication (5)</p>	<p>The Consumer Scotland 2020 Act requires public authorities to publish information about the steps which they have taken to meet the duty.</p>	<p>This impact assessment is published as part of the decision making process by West Lothian Council in setting its budgets for 2026/27 and 2027/28 and updated year capital investment strategy to 2032/33.</p> <p>However, implementation of the agreed budget, including any required savings, will progress during 2026/27 and 2027/28 and, indeed, in subsequent years. The impact on consumers will be monitored during these processes and further engagement undertaken where that is considered necessary.</p> <p>The process will be further described in annual reporting about the steps taken by West Lothian Council to meet the Consumer Duty.</p>