

A large crowd of people is gathered in a town square at dusk. In the foreground, a man in a blue jacket carries a young girl in a bright pink jacket on his shoulders. Other people are looking in various directions, some smiling. In the background, a large statue stands on a pedestal, and buildings with lights are visible under a cloudy sky.

MORAY ECONOMIC DEVELOPMENT ANNUAL REVIEW 2018/19



moray
council



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1 Introduction

I'm delighted to introduce you to the fifth Economic Development Annual Review, the intention behind this being to provide a comprehensive overview of major economic development activity driven or closely supported by various services across the Council during the financial year. As with previous reports, although the focus is largely on activity within the financial year, information on the way in which key developments then progressed over the remainder of 2019 and beyond is also provided where this is helpful.

Without a doubt, the standout development for me during 2018/19 has been the progress of the Moray Growth Deal and the Quantum announcement in July 2019 of £65 million pound support from the UK and Scottish Government.

The past year has been one of the most significant in terms of economic development activity since we began our annual reports in 2014/15. At a strategic level, Moray Growth Deal funding was announced in July 2019 at £65 million, producing one of the highest levels of funding per capita across Scotland – a great result for a rural deal and a reflection of not only the strength of our proposed programme but also the tremendous energy and commitment applied to the programme development by officers, councillors, politicians, local business leaders and community representatives since 2016 when our journey began. We now look forward to agreeing Heads of Terms (the initial high level agreement on programme content) shortly, with the full agreement which contains detail on the full programme signed before the end of 2020/21. That would signify the opening of a gateway which will allow implementation on the ground to start, continuing over the 10-15 year lifespan of the deal.



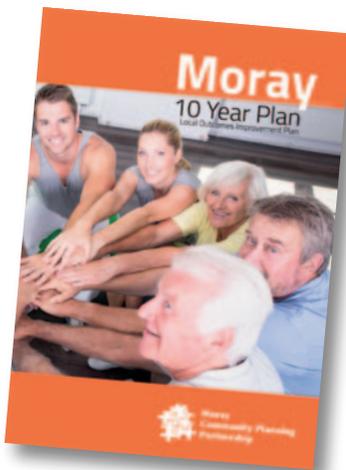
Other noteworthy developments were the launch of a revised Moray Economic Strategy led by Highlands and Islands Enterprise, and a new Skills Investment Action Plan for Moray. These alongside Moray Growth Deal represent the most significant review of economic strategy in Moray for over a decade.

Another major development which is progressing is the significant investment at RAF Lossiemouth which will become the home for nine new P8 Maritime Patrol Aircraft as well as an additional Typhoon squadron, with a £400 million MOD investment in the base. Whilst economic diversification and reduced reliance on the MOD have been key objectives of Moray Economic Strategy since it was framed in 2012, the sheer scale of these developments and the economic opportunities which they will create for the area estimated at in excess of £100m a year, have been universally welcomed by our communities.

I hope you will enjoy reading more about these developments and others and that this report will help to build understanding and appreciation for the strength and breadth of collaboration which supports economic development in Moray.

Rhona Gunn
*Depute Chief Executive
(Economy, Environment and Finance)*

2 The Strategic Context



Moray Local Outcome Improvement Plan

In the Spring of 2018 the Moray Local Outcome Improvement Plan (LOIP) replaced Moray 2026. The LOIP provides a vision and focus for the Moray Community Planning Partnership (CPP). It aims to tackle the greatest differences in outcomes

between and within Moray communities and to focus on where working alongside the community partner agencies can add greatest value by working in partnership and so meet the needs and aspirations of the community.

Although all partners are operating in challenging times with diminishing resources and increasing service pressures, they are committed to coordinating resources to tackle the challenges facing our communities and provide services that meet their needs as efficiently and effectively as possible.

The CPP **Vision for Moray** is –

Raising Aspirations through Expanded Choices, Improved Livelihoods and Wellbeing

The CPP aims to **raise aspirations** by creating an enabling environment where Moray residents can achieve expanded choices, improved livelihoods and wellbeing.

Four main priority areas have been identified to guide this vision:

- 1** Growing, diverse and sustainable economy
- 2** Building a better future for our children and young people in Moray
- 3** Empowering and connecting communities
- 4** Changing our relationship with alcohol

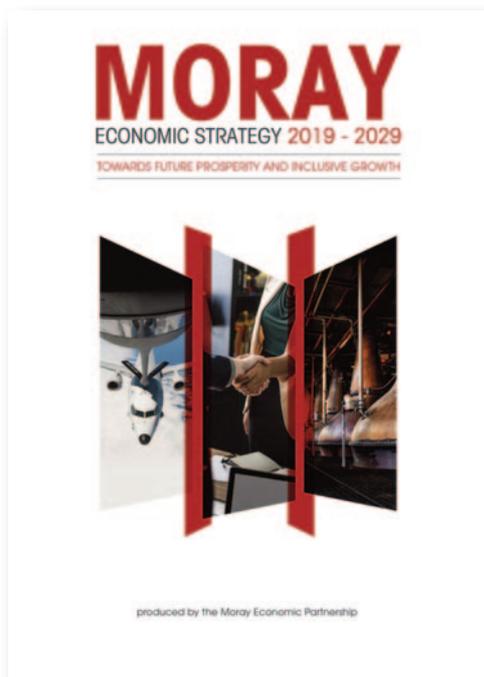
The LOIP includes a set of performance indicators (PIs) for the economic priority that will be used to monitor progress by the partners in meeting their commitments. Partners will be responsible for updating the targets which have been assigned to them, and providing data to the CPP. In future editions of this review references to relevant LOIP economic performance indicators will be included.

Moray Economic Strategy/Partnership

The strategy was reviewed and in December 2018 a refreshed strategy was published. The strategy takes account of changes in the economic landscape since 2012. It also reflects the work undertaken for the Moray Growth Deal. The strategy is for the period 2019-2029. It maintains the overall objective to grow and diversify the economy and focuses on achieving four outcomes:

- Outcome 1 Qualification Levels** - An increase across all ages and genders in qualifications relevant to growth sectors.
- Outcome 2 Small Business Growth** - More small and medium-sized businesses employing between 10 and 100 people.
- Outcome 3 Talent Attraction, Retention and Return** - More skilled, higher paid jobs that deliver net in-migration in the 16-29 age range.
- Outcome 4 Business Competitiveness** - An increase in capital investment and focused workforce development to strengthen competitiveness.

The partnership has provided guidance and support for many of the projects contained within this report.



Moray Council Corporate Plan

A draft of the Corporate Plan – Moray Our People Our Place Our Future. was approved for community engagement and, subject to feedback from that engagement, is due to be adopted in early 2020.



Achievements from the previous corporate Plan include:

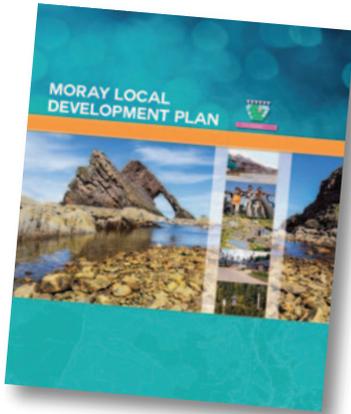
- successful involvement of communities in work to develop the Moray Local Development Plan 2020
- development of locality plans in New Elgin East and Buckie Central East
- community asset transfers, including work with town halls and community centres
- delivery of over 500 housing units since 2011
- progress made with the Moray Skills Investment Plan that aims to align course provision and skills pathways to local employer needs
- improvements in wage levels and gross weekly pay for female workers
- confirmation that the Moray Growth Deal would see an investment to fund targeted economic development activity

The key themes of the new Corporate Plan are:-

- **Our People:** Provide opportunities for people to be the best they can be throughout their lives with a strong and sustained focus on those individuals and groups in our society who experience the most disadvantage and discrimination
- **Our Place:** Empower and support communities to build capacity
- **Our Future:** Drive economic development to create a vibrant economy for the future

In terms of the driving economic development to create a vibrant economy for the future the plan seeks to progress the Cultural Quarter and other Council led projects within the Moray Growth Deal, progress the Moray Skills Investment Plan and develop a more collaborative approach to Employability.

3 Inward Investment and Development



Inward investment and development is a critical aspect of sustainable economic growth for Moray. The Moray Local Development Plan (MLDP) sets out the blueprint for such growth in Moray, establishing policy to promote sustainable

economic development, address the environmental and climate change impacts and establish the principles of good design and placemaking. The allocation of land for housing, employment land, retail and commercial activities enables investment decisions and provides certainty in the planning system.

The shortage of effective employment land has been highlighted as a significant challenge from the outset of preparing the new Local Development Plan and the Proposed Plan identifies large new employment land designations at West Mosstodloch; Easter Newforres, Forres and Burnside of Birnie, supporting the ongoing development of Barmuckity and the Enterprise Park, Forres.

Throughout the year HIE Moray has supported 76 businesses through Account Management and 22 Social Enterprises. Significant inward investors include Orbex, who are developing a lightweight space rocket for launching satellites, and Slam Worldwide, an international multi-media company. Other potential inward investors are in forestry, tourism, food and drink industries. Over the year, HIE Moray involvement has led to significant increases in both domestic and international company turnover and increasing employment.

Moray Growth Deal

The Moray Growth Deal is a regional deal designed to boost economic growth across Moray. It is a long-term plan centered on specific projects designed to transform the economy, address concerns around encouraging young people to live and work in the area and address gender inequality in employment. It brings together Scottish and UK governments, Moray Council, partners from across the public and third sectors and private businesses.

Each of these partners will work together to invest in a better future for Moray.

The overall vision for the Moray Growth Deal has been summarised as Innovation from Tradition, focusing on how we have built on our traditional industries to diversify and develop our economy. This is more fully articulated in a vision for Moray in 2030:

By 2030, Moray will be known as:

- An outward facing and ambitious community
- A thriving and well connected commercial base
- An environment in which quality of life is valued and supported
- A destination of choice

To be a success there needs to be wide understanding and support for the Moray Growth Deal bid. For campaign information visit [My Moray](#).

During 2018 and 2019 partners have been developing strategic outline business cases for a number of projects that have formed the basis of initial discussions with both governments.

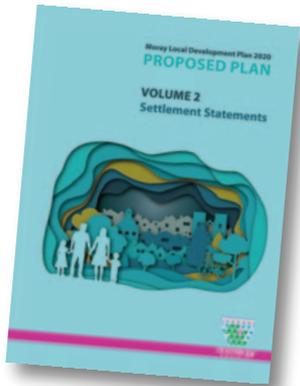
Workshops were held in June 2018 to receive initial feedback for compatibility with government objectives and further workshops have been held during 2019 with stakeholders ; this has enabled partners to continue working to strengthen their business cases.



In July 2019, the UK and Scottish Governments announced that the Moray Growth Deal would be supported by both governments to a value of £65 million pounds. Progression to Heads of Terms is expected shortly and meantime business cases continue to be developed.

i) Moray Proposed Local Development Plan (MLDP)

As mentioned earlier, the LDP is a vital aspect of supporting and facilitating the Council's priority for economic growth. Moray Local Development Plan 2020 will provide an updated vision and spatial strategy for directing growth in Moray between 2020 and 2040. The Proposed Plan was consulted on for a 10 week period from 7th January to 15th March 2019.



The Proposed Plan has been submitted to The Planning and Environmental Appeals Division (DPEA) for examination of unresolved representations by Scottish Ministers. The new Local Development Plan is anticipated to be adopted and fully operational before the end of July 2020.

Significant housing growth areas are identified in the new Plan at Elgin South, Findrassie Elgin, Lochyhill Forres and Buckie south west with significant new employment sites identified at Burnside of Barmuckity, Waterford, Forres, Easter Newforres, west Mosstodloch and opportunities for small business units at Speyview, Aberlour. Some employment land sites may be compromised by the A96 dualling preferred route but this has been factored in with an additional amount of land identified. When complete the dualled route will bring significant economic benefits to Moray through reduced journey time to market and increased accessibility for visitors.

The Plan will continue to support the right development in the right place principle established in Scottish Planning Policy, including support for traditional rural industries which are a key part of Moray's economy.

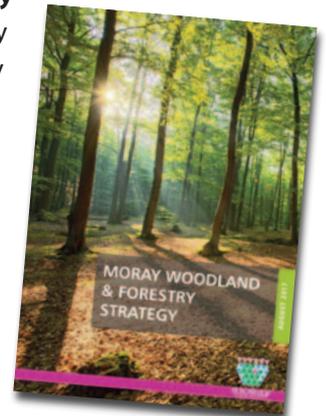
A long term approach is taken to strategic planning with a number of large scale masterplans completed for Elgin South, Findrassie, Dallas Dhu and Bilbohall.

Quality development and a quality environment support economic development and embedding placemaking in policy will help deliver more attractive, active, integrated and healthier places. Working in partnership with NHS Grampian, Scottish Water, Education, and Transportation the plan will help to establish and co-ordinate infrastructure requirements associated with proposed development to support economic development.

The new Plan will offer greater stewardship of Moray's outstanding natural environment, promoting biodiversity in new development, safeguarding woodlands and designating a series of new Special Landscape Areas.

Woodland and Forestry Strategy

A Woodland and Forestry Strategy for Moray was adopted in January 2018. The strategy is framed around a 20 year vision of growth for our forests and woodlands. Moray's diverse and distinctive forest and woodland resource offers significant potential to attract investment and support employment. Annually within Moray, direct forestry related employment of Moray residents has been estimated at 630 full time equivalents and there are identified opportunities to increase this.



The strategy aims to derive the greatest economic benefit from existing and future resource. For example by promoting tourism and recreational opportunities for glamping and forest lodges within the woodlands at Roseisle and supporting the development of Culbin forest as a family cycling destination. There has already been interest expressed in the development of tourist accommodation within woodlands in Moray. The Council is keen to work in partnership with Forestry Commission Scotland and Moray Speyside Tourism to further explore potential projects.

One project identified through the Strategy is a feasibility study for the upgrading and development of the Moray Way which has been completed and led by the Strategic Planning and Development section.

There are specialist architects throughout the region who have developed considerable skill in using locally grown timber. There is an opportunity to continue to develop demand for locally grown timber. The promotion of woodfuel and biomass as a sustainable source of heating will continue to create a demand for firewood, woodchip and wood pellets and help create employment related to supply chain opportunities

ii) Development Management and Enforcement

Scottish Planning Policy (SPP) was issued in June 2014 and introduced a presumption in favour of development that contributes to sustainable development.

Development Management's primary function is to process planning applications, deal with development enquiries, provide pre-application advice. In addition the section monitors planning conditions and deals with all enforcement enquiries when queries are raised by members of the public. We work collaboratively with key agencies and other internal departments to deliver major projects both public and private in an efficient, streamlined manner which provides certainty for the developer and also achieves the Council's sustainable economic development priority.

Having an up to date Moray Local Development Plan with associated Supplementary Guidance is essential to dealing with development proposals effectively. All major development proposals and proposals which have significant economic impact are now covered by a processing agreement between the Council and the developer setting out key milestones over the life of the project (from the pre-application stage through to the signing of a Section 75 legal agreement and discharging planning conditions prior to work commencing on site).

Significant work has been carried out on master planning such as that seen for Elgin South and Findrassie and highlights the importance of working with developers and providing pre-application advice to improve the quality of design in final submissions as well as front loading the planning application process. A framework has recently been approved for Barmuckity Business Park to assist with its delivery on the ground and work has now commenced on site along with a number of planning applications being approved and further ones being submitted.

In 2013 the Economic Development & Infrastructure Services Committee agreed that as sustainable economic development was a priority, in assessing proposals which promote sustainable economic development in Moray, where a planning or roads policy or standard is open to interpretation, the Council and its officers will apply a purposive approach to interpretation with this priority in mind, taking a flexible, pragmatic and proportionate approach and considering alternative solutions whilst safeguarding the aims of the policy/standard. This has widely been reported as contributing to a more user friendly approach to regulation of the built environment.

The Planning Performance Framework (PPF) is prepared and submitted annually to the Scottish Government and sets out how the Planning Service contributes to the Council's sustainable economic development priority, this year has seen further improvement in scoring for the year 2018 demonstrating constant improvement and we anticipate that further improvements in the current financial year will be reflected in the next PPF submission.

The PPF sets out a number of cases studies which show cases developments and how the service is delivered in Moray.

Application numbers have reduced slightly in 2018/19, due to permitted development rights being extended and performance has continued to improve with the average time for local applications at 6.6 weeks and householder applications also at 5.3 Major development average determination timescales are also down to 16.5 weeks.

Building Standards

In 2018/19 the Building Standards Service received 960 applications for Building Warrant and 1049 submissions for Completion Certificates. The value of building work processed by the Service was £103.1M which is £4M more than in the previous year.

During the year 2018/19 82% of our applications were received electronically via the online portal.

i) Local Housing Strategy

During 2018/19, Moray Council's affordable housing programme achieved 90 completions.

The total amount of Scottish Government grant invested in affordable housing in 2018/19 was £6.195m, of which £2.643m was invested in Council housing. Total investment in affordable housing in 2018/19, across all landlords, including Scottish Government grant, the Council's prudential borrowing and Housing Association borrowing is estimated at £10m.

The Council's new build programme achieved 68 house completions with a further 94 under construction at year end. The completions contributed to the Housing Business Plan target to build 70 houses per annum for 3 years to 2020. During the year, housing associations achieved 22 completions and 50 houses under construction at year-end. The new build programme supports the aims of the Moray Local Outcomes Improvement Plan by providing new affordable housing for an increasing population, and will facilitate a growing and diversifying economy.

The new build programme represents a significant investment in Moray, with residential construction recognised as a key enabler of economic development.

The proposals for the Council's future new build programme were set out in the Strategic Housing Investment Plan which makes provision for the completion of 255 new Council and Housing Association homes by March 2021.

ii) Private Sector Build Out

The Council prepares an annual housing land audit and is required by Scottish Planning Policy 2014 to maintain a 5 year supply of effective land (free from constraints) and to ensure there is a generous supply identified in the LDP. The 2019 Audit shows that the Council has maintained a 5 year effective supply. With an effective housing land supply of 4189 units, which equates to a 7.8 year effective housing land supply. The total housing land supply 2019 (effective and constrained land) is 12,387 units, of which 4,745 units are identified as longer term housing land reserve, which can be brought forward as and when required.

House completions in 2018 were 312, compared with 382 in 2017, 334 in 2016, 337 in 2015 and 309 in 2014. Projected completions are estimated to increase over the next couple of years as sites within LDP 2015 are built out. The majority of completions in 2018 were for housing projects in Elgin, Forres and Buckie. Development rates in Keith and towns in Speyside continue to be low and Officers are looking at how existing sites can be made more effective. Consideration is also being given to sites which have been in successive plans with little sign of progress and if these should continue to be identified.

New build housing in Buckie



Commercial

i) Industrial Portfolio

Occupancy rates remain near capacity with 28 businesses securing new property in 2018-19. There has been an upturn recently in private sector interest in developing new business units on sites where the public sector has provided infrastructure and the Council will monitor this closely to determine the extent of future new Council provision.

Although there remains a lack of serviced sites ready for development this has been addressed in East Moray by the Council constructing roads and services at March Road, Buckie to provide a supply of development sites for business seeking to build their own bespoke premises.

Meantime a refurbishment/upgrading programme is on-going in relation to existing properties, to ensure they continue to meet business needs.

ii) Barmuckity- Elgin Business Park

There is currently a severe shortage of developable serviced industrial and commercial land in and around Elgin, the administrative capital of Moray. However a developer (with support from Highlands and Islands Enterprise £1.9m of grant aid) began constructing roads and services at Barmuckity, to the East of Elgin during 2016 - this is expected to provide around 30 hectares of serviced land for industrial and commercial uses. Planning permission was granted for a Travelodge Hotel in June 2018. There are a number of active enquiries and planning applications from businesses seeking to locate here.





iii) HIE/ Enterprise Park Forres

With no vacant units on the Enterprise Park, Forres, HIE Moray team are now planning the next phase of development to accommodate known demand. HIE continue to support Glasgow School of Art in their campus on the Altyre Estate near Forres and planning consent has recently been obtained by a developer for student accommodation nearby which could free up much needed rental accommodation in Forres and elsewhere. The inaugural Moray Accelerator programme (costs supported by HIE) ended with a showcase event on 10th December. Moray's Social Enterprise Network (MSEN)/tsi Moray and Highlands and Islands Enterprise Moray Area Team are hosting an event at Horizon Scotland, Forres, to kick start a plan for Moray's social enterprises. The Moray Area Team are proceeding to procurement for a Small Business Unit on an available plot on the Enterprise Park in Forres. HIE Area Teams staff hosted the first Moray HR Network meeting in November. This brings together a range of area employers to discuss common skills, labour and other related issues. Feedback from the first meeting was positive, and staff believe it will make an impact on talent attraction/ retention agenda.

iv) Private Sector - Town Vacancy Rate

Town Centre Health Checks are undertaken biennially to assess the vitality and viability of Moray Town Centres and when used consistently over a period of time as part of a town centre health check, help to demonstrate changes in performance that can inform future decision making. The last Town Centre Health Check was completed in summer 2018.

The 2018 health checks highlighted that vacancy levels in Elgin, Forres, Lossiemouth and Dufftown were lower than 2016, while vacancy levels in Keith, Buckie, Aberlour, Rothes and the Edgar Road area of Elgin increased. Vacancies in Fochabers remained the same.

Keith Town Centre



Elgin BID

Over the few last years, the Elgin BID has played an active role in improving the local business environment in the centre of Elgin and formation of some key business projects including the Town Centre Fund, Elgin CARS and Castle to Cathedral to Cashmere project under the Moray Council leadership. These projects aim to create a link between the private and public sectors in order to help growing local businesses in the centre of Elgin by creating a mutual working environment that can benefit both sectors.



Town Centre Fund

The Scottish Government allocated £1,233,000 to Moray for capital expenditure only.

The aim of the Town Centre Fund is to enable local authorities to stimulate and support place-based economic investments which encourage town centres to diversify and flourish, creating footfall through local improvements and partnerships. This fund will take part in formation of life-changing investments that stimulate local economic activities and regenerate town centres to grow and become more diverse, successful and sustainable.

The following actions are agreed by Moray Council in order to transform the town centres of smaller settlements through the Town Centre Fund.

- On 8 May 2019 Moray Council agreed to offer a grant scheme for the town centres of Elgin, Forres, Buckie, Lossiemouth and Keith to turn empty space into living space for residential and or student accommodation.
- A Grant Scheme is offered for the town centres in Elgin, Forres, Buckie, Lossiemouth & Keith to turn empty spaces into living space for residential and or student accommodation.
- To enhance low carbon accessibility and transportation hub initial proposals, in Buckie a bus stop bay is proposed to improve journeys to and from the town centre. In Elgin, it is proposed to transform the bus station into a travel hub.
- Shop front improvement and/or small grants is proposed for the town centres at an intervention rate of 50% with a maximum grant availability of £25,000.
- Enhancing some of the public realm including digital smart systems is proposed.

Town Centre Masterplan

The Elgin Town Centre draft concept Masterplan is going to Planning & Regularoty Services Committee in April 2020 seeking approval for public consultation. The Masterplan is being developed in partnership with Elgin BID and Elgin Community Council. Officers are working with Architecture and Design Scotland on a pilot project to explore Elgin Town Centre as a carbon free/carbon reduction place. The Plan aims to increase the vitality and economic performance of the town centre.

4 Transport and Infrastructure

A96 Inverness to Aberdeen Dualling

The Scottish Government has a commitment to dual the A96 between Inverness and Aberdeen by 2030. The scheme is being promoted by Transport Scotland as Trunk Road Authority. Moray Council considers the promotion of the A96 corridor vital to the economic development of Moray. In December 2018 Transport Scotland announced their preferred route option. Work commenced on DMRB Stage 3 – design and assessment of the preferred option. The project team continue to liaise with the council on a regular basis.

Elgin Transport Strategy

The Council has recognised the need to plan the transport infrastructure that Elgin requires in order to support development growth and reduce congestion. Further work on active travel routes has been carried out to support delivery of the strategy.

Buckie Harbour

The harbour has seen growth in cargo, fishing and offshore related business during 2018/2019. The council is seeking for funding to support the installation of an ice plant and extended chill facility in Buckie Harbour to support the fishing industry.

Public & Community Bus Transport

In addition to the commercial Stagecoach bus services, the popular council operated Dial M demand responsive service has continued to provide a valuable service to residents across the whole of Moray. The additional services introduced in 2016 are performing well as part of the service provision.

The principal focus of community transport is to minimise social exclusion and provide access to services.

Core paths

Development, improvement and promotion of The Moray Core Paths network continues to be modest due to reduced budgets. Nevertheless progress has been made during 2018/2019 as follows:

- Moray Walking and Outdoor Festival- the 7th midsummer festival used many of the Core Paths as walking event locations. The Festival is focused on raising the profile of outdoor access opportunities in Moray inclusive of 'The Moray Way' (around 95 miles of Core Paths in Moray).
- Speyside Way in its entirety from Buckie to Ballindalloch and the spur from Ballindalloch to Glenlivet (Core Paths SW01 to SW05) - Ongoing maintenance, promotion and events support. e.g. Dramathon. A section of the route is being upgraded to a cycle route standard between Craigellachie and Carron; costing just over £600K as part of the Speyside Low Carbon Hub Project. This is due for completion by end 2019.
- Core Paths small works winter programme – a range of small scale improvement projects designed to improve accessibility.
- Core paths Signage Programme – an ongoing modest scheme of new and replacement signage.
- Enabling and support of community path projects. Rothes to Craigellachie Railway path and Burghead to Lossiemouth Cycle Path.
- Continual support of Community Groups involved in practical path management for example . Dava Way Association.
- Ongoing promotion of Core Paths via the Morayways website and participation in the Scotland's Great Trails initiative.



The Council has completed review of its Core Paths Plan inclusive of the addition of over 73 new Core Paths and 36 amendments to the line of existing routes. An Amended Plan will be submitted for adoption at start of 2020 which is likely to be subject to a Local Inquiry to resolve objections to two Core Path proposals. In addition a windfall of £50K annually for 25 years is being received by the Moray Council from the Dorenell Windfarm to be spent on development, promotion and management of Core Paths across Moray. An Action Plan will be prepared to focus resources on identified priorities.

Low Carbon and Active Travel

In its promotion of Active Travel (through physical activity, cycling and walking) Moray Council has an ongoing programme of infrastructure improvements and soft measures to encourage use of the network.



Work commenced to create a Low Carbon Hub in Speyside with the installation of e-bike facilities, additional electric vehicle chargers and upgrades to the Speyside Way between Craigellachie and Carron to enable cyclists to use the route for everyday journeys. The project is an ERDF funded project with additional funding from Scottish Government, Moray council and HITRANS which aims to increase everyday low-carbon journeys across Speyside centered on Aberlour.

Linked to this is the participation in a European project led by HITRANS the regional transport partnership. The GPaTRA project is focused on testing low carbon transport solutions in new areas, and a fully electric bus service has been introduced between Aberlour and Forres.

In June 2019 Moray Council declared climate change emergency and set the aim of becoming carbon neutral by 2030 to drive forward environmentally-friendly policies.

Broadband and Mobile Phone Infrastructure (connectivity and speeds)

Moray was at the front end of the rollout of superfast broadband across the Highlands and Islands. It is part of the wider Digital Scotland Superfast Broadband (DSSB) programme. The project is paid for from public funding from UK and Scottish Governments and Highlands and Islands Enterprise (HIE). The programme is being delivered under contract by BT, overseen by HIE (Digital Highlands and Islands – DigitalHI).

As of July 2018 around 86% of homes and businesses in Moray can now access superfast download speeds of 24Mbps or above.

When combined with commercial roll-out of services to some parts of Elgin and Forres, coverage will reach more than nine out of ten homes and businesses by the end of 2018.

In Moray the project has built new core fibre network which provides the 'backhaul' or capacity necessary to then build the local infrastructure to get communities connected to better broadband. More than 110 fibre cabinets have been built and are live through the project reaching more than 30,000 premises which would not have been reached otherwise.

Areas with potential roll-out still in planning Ballindalloch, Dallas, Drummuir, Elgin, Forres, Glenlivet, Keith, Lhanbryde, Mulben, and Rothiemay.

Once areas that will not be covered by the roll-out are known, Community Broadband Scotland (CBS) are set to work with local communities to devise design solutions that will provide access.

Cairngorm National Park is working with CBS on a park wide solution.

Satellite Broadband and Wireless Service providers are operating in the area and offering services to locations not anticipated to be served.

What's Happens Next: The Scottish Government has made a commitment that all Scottish premises will be able to access broadband with a download speed of at least 30Mbps by 2021. **Note:** that date has recently been extended to 2023 with a voucher scheme in place during the intervening period.

It has announced a £600m investment programme and has launched a procurement to find suppliers to deliver three regional contracts covering Scotland. In the meantime anyone who can't access at least 2Mbps download through mainstream services can apply to the BETTER BROADBAND SCHEME

Training is being provided by partners HIE, the Moray Chamber of Commerce, The Cairngorms Business Partnership and Business Gateway for business to take advantage of digital access.

Mobile phone operators began rolling out 4G (4th Generation) infrastructure during 2016 and 2017 which will reduce spots with no signal and cover all roads for emergency services. The work continued in 2018.

Rail and Air

Transport Scotland have recognised the need for improvements to the rail network in north-east Scotland, with the Aberdeen-Inverness route having seen significant growth in passenger numbers over recent years. Despite this growth the timetable and network capacity has not changed in many years. Network Rail, the rail infrastructure provider, has been funded to make improvements between Aberdeen and Inverness. Initial timetable improvements were introduced in December 2018 with nine additional services between Elgin and Inverness. Further improvements are due to be delivered in 2019/20.

Work has continued through the Highlands and Islands Transportation Partnership (HITRANS), the regional partnership of which Moray Council is a



member, to promote a new railway station for Inverness Airport at Dalcross. Scottish Government has confirmed that funding will be made available for this important facility. This new station will assist in integrating the different methods of travelling without the use of a private car.

Timber Transport

Commercial Forestry now covers 14% of Scotland and that is forecast to increase with investment in downstream processing to match. In excess of £200m worth of processed timber products are driven down the A9 every year.

Problems can arise in getting timber from the forest to the processors or biomass users. Over 3 million tonnes of timber is forecast to be taken from forests on Moray's roads in the next 15 years. A study recently conducted shows that some of this timber will have to travel over public roads which are not suitable for the quantities involved.

Due to pricing constraints which limit the industry's capacity to contribute to local authority road improvements, for the last ten years, the Scottish Government has provided funding through the Strategic Timber Transport Scheme (STTS) of £3m to help address timber transport issues.

Moray Council, acknowledges the value of timber production to the local economy and has identified a budget for Timber Transport Route Improvements. This budget is used to apply to the STTS for match funds for improvements to assist the transport of timber and to assist the local communities affected by timber transport.

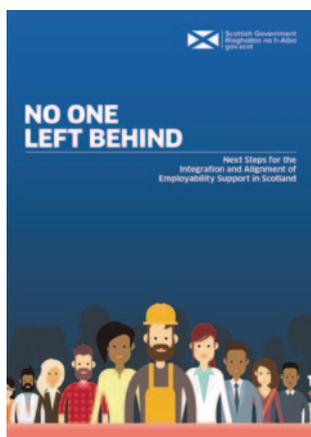
Over the last few years, the Council has received grant funding from the Scottish Timber Transport Scheme (STTS) which has provided external financial investment for road improvement works, to improve the transport of timber.

The level of funding has been variable over the years, as has the percentage of finance for schemes been. In recent years Moray has benefitted by the sums below:-

- 2014/15 - £135,000 - 50% of scheme costs
- 2015/16 - £76,500 - 50% of scheme costs
- 2016/17 - £121,350 - 50% of scheme costs
- 2017/18 - £550,000 - 70% of projected costs.
- 2018/19 - £394,000 - 70% of projected costs.
- 2019/20 - award for year up to £243,000 up to 70% of projected costs.

Future funding levels are however uncertain.

5 Employment



Employability in Moray Overview

During 2018, Scottish Government carried out an employability review across Scotland and as a result published an action plan called No-One left Behind in December 2018.

The link to the full report is below:

<https://www.gov.scot/publications/one-left-behind-next-steps-integration-alignment-employability-support-scotland/> The ambition is to design – together with the communities we serve – an employability system in Scotland that:

- provides flexible and person-centred support including aligning the Activity Agreements and Scotland's Employer Recruitment Incentive (SERI) programmes to begin to establish a new local employability delivery model from April 2019
- is more straightforward for people to navigate;
- is better integrated and aligned with other services, particularly with health, justice and housing provision;
- provides pathways into sustainable and fair work;
- is driven by evidence, including data and the experience of users; and supports more people – particularly those facing multiple barriers – to move into the right job, at the right time.

In a local context, the actions within the employability review are being taken forward by Moray Council as lead partner and in partnership with the newly launched Moray Pathways Consortium. Moray's public, private and 3rd sectors have joined forces to provide a single point of contact for businesses and people to access information on skills, employment, training and support.

The Moray Pathways Consortium and associated local employability website was launched in May 2019 and 21 partner agencies have signed a partnership agreement. The consortium has recently created an action plan and are taking forward the following themes: Employability provision, Workforce Development, Digital Links and Employer Links.



The consortium and the associated Moray Pathways website and social media pages were developed in response to the Moray Skills Investment Plan (SIP). The website has had 1,140 users since May 2019 and as a result there has been an increase in employer engagement. Over 2018/19 the Skills Investment Plan has been monitored via the Employability & Skills Group which will reports directly to the Moray Economic Partnership, a particular focus on young people has remained through the DYW Partnership group.

The Moray Skills Investment Plan (SIP) under the Employability & Skills Group work is grouped under 4 key areas:

1. Effective Information & Advice
2. Supporting Key Economic Priorities
3. A Responsive Skills Infrastructure
4. Enhancing Employer Engagement

Developing the Young Workforce (DYW) Partnership group has collectively mapped out all the DYW recommendations in an action plan under 5 key headings:

- Learner Pathways
- Quality Assurance
- Early Intervention & Prevention
- Promoting Equity
- Culture & Practise

During 2018/19 progress of where Moray is across the DYW themes was published in October 2019. Significant progress has been made in embedding the Career Education Standard and the range of opportunities for schools to interact with local businesses, creating stronger links with industry.

Moray Skills Framework & Pathway

Moray Skills Framework is an agreed 8 key skills that all young people in Moray will develop through learning and work related experiences, all young people should be able to reflect on these and discuss the next steps they need to take to develop these further both in the school context and in the World of Work. These being:

- Employability
- Creativity
- Self-Management
- Teamwork
- Communication
- Thinking
- Interpersonal
- Leadership

Aiming to develop the capacity of every pupil to be successful in their learning, confident in themselves, effective in their contribution to the school, the community and society, and able to make responsible decisions now and in the future.

Moray Skills Pathway is a single framework to lay the foundations of the world of work for all young people (3 – 24years) through offering opportunities in the curriculum to develop the skills, knowledge and attitudes required for the workplace thus supporting employers and Moray's economy.

Aims

- All young people in Moray throughout the Broad General Education (3-14yrs) will have 4 activities with each key sector prior to Senior Phase choices.
- Clear pathways developed for each key sector for young people to progress throughout the Senior Phase and beyond.
- An increase in the number of opportunities for young people with barriers to employment. (addressing inequalities)
- A partnership approach to the joint design and delivery of the learning offer (curriculum)
- Science, Technology, Engineering and Maths (STEM) will sit at the heart of the development of the Moray Skills Pathway.

The 8 key sectors were reviewed over 2018/19 to be in line with the Moray Economic Strategy 2019-2029 becoming:

- Learning and Childcare
- Health and Life Sciences
- Engineering and Manufacturing
- Construction
- Food and Drink/Tourism
- Creative and Digital
- Business and Defence
- Land Based

The close collaboration of Education (Schools, Further & Higher Education), Skills Development Scotland and DYW Moray allows for a joined up approach to ensure the correct pathway is available to all young people.

Key Highlights

- 1200+ P6 pupils attended over 3 days STEM in the WORKPLACE at RAF Lossiemouth, inspiring pupils of the range of STEM careers across our key sectors.
- 634 S3 students attended sector days in our 8 key sectors, led by the partnership and local employers
- 393 S4 students have participated in Meaningful May, a 3 week employability program over exam preparation time.
- 44 S5/6 students undertook a Foundation Apprenticeship in 4 different frameworks.

STEM in the workplace pictures



Work Placement

Work has been undertaken to review the work related learning pathways in line with the Work Placement Standard, significant changes have been made to traditional work experience to ensure it is at an appropriate time for the young person and these changes will be ongoing and in line with the DYW partnership group action plan. We currently have 845 work placements available on the work experience database.

Career Ready continues to be a significant part of the work placement offer through meaningful work placements, currently 224 young people have engaged in Moray with 99.5% having positive destinations.

Employability (part-European funded project)

This project, which is part-funded by the European Social Fund, began in January 2017. The project aims to help people who have multiple barriers to work move towards and into work. The Council is the lead partner with two schemes being delivered by local organisations. The Social Enterprise Academy has been training out-of-work people with a focus on helping them to learn about and gain work in the social economy sector. Elgin Youth Development Group have been giving young people experience in the hospitality sector and helping them to develop skills to move towards work. The project worked with 30 clients during the year.

Skills Development Scotland Key Data for Moray:



Employment Land

The Local Development Plan provides a range of existing and new sites for employment purposes, from general industrial land through to high amenity Business Parks. Land supply is key to achieving the desired outcome of a diverse and sustainable economy as expressed in the Local Outcome Improvement Plan. Serviced land and quality accommodation is needed to support business start-ups, to attract inward investment, and to grow employment opportunities both in existing and emerging key sectors of the economy.

The Council monitors the supply of employment land through an annual audit. The Employment Land Audit 2019 found that there was 153.4 hectares of land (net) within the Established land supply, a decrease of 0.91 hectares since 2018 due to the removal of the sites from the audit on completion and due to lapsed planning consent.

79.84 hectares of land (net) across 15 sites is classed as Marketable/ Effective. This is a decrease of 0.43 hectares since 2018. This is due to construction activity. The audit highlights that whilst there is a reasonable area available the number and choice of sites across all settlements is limited.

The audit highlights that further land needs to be identified in the Elgin Market Area in the next Local Development Plan to improve choice and enhance supply. In Forres there is a shortage of general industrial land and in Buckie the Council completed the servicing and infrastructure at March Road and sites are now being marketed. The new Plan also identifies a number of mixed use sites, recognizing the financial viability issues around employment land sites.

The amount of land immediately available in 2019 is 39.15 hectares (net) across 6 sites. This is an increase of 21.2 hectares compared to 2018. This is due to the servicing of sites at Barmuckity (I7) and at March Road SE (I3).

72.64 hectares (net) across 17 sites is classed as constrained, which means around 47% of the established supply has some form of constraint that is likely to prevent the land being brought forward for development in the next five years. A large proportion of this land is constrained due to ownership, which could be where a landowner is unwilling to sell or are seeking alternative uses with higher land values.



1.29 hectares of land was developed in the year to 1st January 2019, including Completion or occupation of sites at March Road SE/Rathven Industrial Estate (I3), Grampian Furnishers at Linkwood East (I6), yard space occupied at Waterford (I3), yard space occupied at Back Burn (I1) Rothes) and completion of buildings at Findhorn. This is lower than the previous years (1.6ha- 2018). At 1st January 2019 there was 2.55 hectares of land under construction.



Other notable employment land development outside designated employment land include new bonded warehouses at Glenfarclas, Benromach, Tamdhu and Malcolmburn, and an office and workshop at Drumbain Farm Rothes.

Procurement

The annual Procurement Strategy sets out how Moray Council will meet its Procurement duties to comply with the requirements of the Procurement Reform (Scotland) Act 2014. This includes a wide ranging set of considerations that will ensure resultant contracts go beyond commercial considerations.

Supplier development is essential to the success of any procurement project and the procurement team support the work carried out by the Supplier Development Focus Group (Economic Development, Business Gateway and Procurement). In addition to the Strategy and Action plan that the group has developed the Council also became a full member of the Supplier Development Programme (SDP). Through membership of this organization and representation on the SDP Board by the Payments Manager, we have access to training materials, face to face training in Moray and support for meet the buyer events

The aim of the focus group is to deliver on the action plan with the help of SDP that includes support local business growth, improve local investment, environmental wellbeing, encourage diversification and equality, and create opportunity.

We continue to hold supplier events to raise awareness of specific contract opportunities (trades, transport, etc) or encourage engagement between local businesses and the public sector (SDP Meet the Buyer Aviemore, SDP membership launch Forres, third sector workshop Elgin, training events Elgin).

6 Business Support

Business Support was delivered to new and growing businesses in Moray by **Business Gateway** which sits within Economic Growth and Regeneration section and has been delivered in Moray through a Service Level Agreement between Moray and Highland Councils.



During the year 2018/2019:

- **132** new enterprises started with direct interventions from Business Gateway Moray



Cafe Kombucha: Elgin's first Vegan eaterie

- **202** jobs were created or retained as a result of SME's supported by BG starting up, growing or being purchased
- **28** start-up skills workshops were delivered to **326** attendees
- **9** workshops for growing businesses were delivered to 70 unique businesses
- **21** Digital Boost workshops delivered with **219** businesses benefiting
- **44** growing businesses were supported with growth planning, access to finance/Investor ready advice.



Award winning: I Like Birds

- **14** businesses moved across from BG and were accepted into HIE Growth Pipeline meeting Nationally agreed protocols.
- **11** businesses moved across from BG and were accepted into HIE Account Management meeting Nationally agreed protocols.
- **28** Additional Events were delivered by BG Moray or with stakeholder collaboration - with **1800** businesses attending
- Although access to loan funding for SME's remained challenging in 2018/19, with robust financial projections and growth plans in place,

BG interventions helped secure:

- Commercial loan funding for business growth of **£1.08m**
 - Commercial loan funding for start-up businesses of **£636K**.
- capital leveraged into the Moray economy.
- Based on a 100% sample survey the 12 month and 3 year survival rates of business start-ups supported by BG and still trading in 2018-19 in Moray (above the National Average)

Volume Start up survival Rates	12 Months	36 Months
	92%	87%

Moray Business Week 2018

Business Gateway again chaired and led on Moray Business Week in 2018 in conjunction with stakeholder partners. A successful week prevailed with all but one of the events fully subscribed. **506 unique businesses** registered and attended events throughout the week. It was agreed by all stakeholder partners to take the next year to look at different platforms and opportunities to deliver support on a one to many basis to Moray businesses. As a result of discussions and debate, an 'Expo/Showcase' type event is being planned for Spring 2020.

Through the **Local Growth Accelerator Programme (LGAP)** BG delivered the following support to growing business in Moray:

- Specialist business growth advice
- Investor Ready & Access to Finance support
- Recruitment Advisory Service
- Business Growth workshops / Programme

Proposed Joint BG / HIE Moray SME Accelerator

During early 2019 HIE and BG held discussions on working together to develop an SME accelerator. This was based on the recently launched ambitious Moray Economic Strategy 2019 – 2029 which seeks to deliver business growth in small and medium-sized businesses employing more than 10 people. The Moray Accelerator supported young and small enterprises to focus rigorously on their growth in the UK and in international markets thus enabling the achievement of the desired outcomes of the strategy. The Accelerator covered different entrepreneurial themes each week from business models and goal setting, identifying new market opportunities to intellectual property, scaling up, growth and leadership. Delivery ran from end of September to end of November 2019. Building capability of SMEs to secure higher value contracts (public and commercial) and encourage supply chain development, collaboration, routes to international markets and opportunities to create employment opportunities and upskill their present workforce were key components of the accelerator.

Business Loans Scotland

No new loan applications were made from Moray businesses during 2018/19 as all available funds were released in 2017/18. No defaults by loan applicants have been reported to date and Phase 2 of BLS is now 100% funded through the Scottish Government and managed and delivered in-house by Business loan Scotland on behalf of local authorities. BLS is marketed by BLS itself via its website and on social media platforms.

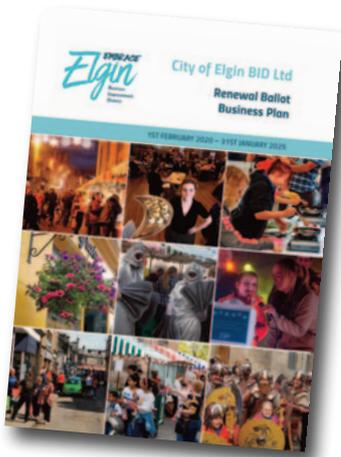
A Supplier Development Strategy is now in place to ensure a programme of support is developed so businesses in Moray are better able to access public sector contracts and supply chain opportunities and get access to training on Public Contracts Scotland (PCS) and PCS tender. In 2019 the Moray Council decided to become a full member on a 1-year trial basis. By assisting Moray businesses to become tender ready for public procurement we can improve their sustainability and market potential.



Elgin Business Improvement District (BID)

Elgin BID (Embrace Elgin) is a not for profit business support organisation working for and with the businesses in Elgin City Centre. The company was created following successful ballot of the City Centre property owners and business operators. Elgin BID engages and consults the business community, collaborating to identify commercial and regeneration priorities and acting as a catalyst for action.

A small selection of the activities undertaken in 2018 – 2019 is included below. More detailed information can be found in the Annual Report, which is published on the Embrace Elgin Website at www.embraceelgin.co.uk



In preparation for the Phase 3 Renewal Ballot, consultation with BID members took place over a year long period in several different ways and at varying times of the day in order to ensure the greatest opportunity for engagement by members and stakeholders. The views and opinions expressed

throughout this time formed the basis of the key themes and projects presented in the 2020 – 2025 Business Plan, which can be found on the Embrace Elgin Website (details on opposite page).

Other activities undertaken included:

- As a result of the short life Footfall Focus Group meeting, a series of promotional videos were created to deliver the message that Elgin is a friendly, exciting place to visit.
- The Seagull Reduction Project was developed to reduce the number of gulls nesting in the city centre, this has seen a tangible reduction in the nesting birds and chicks in the city.
- The Elgin Gift Card was launched mid-2018 and recognition grew throughout the year spearheaded by marketing campaigns and competitions. The Christmas Period was particularly successful, with the card being marketed it as the “Gift of Choice”. The gift card is now accepted in more than 90 BID businesses.

- The Elgin BID small grant scheme has proved positive with members and applications continue to come in on a regular basis. 2018 – 2019 saw 10 grants awarded to BID members.
- Partnership with Police Scotland has gone from strength to strength and BID now have a monthly feature in the members information bulletin; “Business Watch” this ensures Moray businesses have access to current information and advice. In the spirit of collaboration this information is also distributed to partners in Forres, Buckie, Lossiemouth and Keith as well as the Federation of Small Businesses, Moray Chamber of Commerce and Moray Speyside Tourism for dissemination through their networks.
- Mediation role has grown steadily over the year. On an ongoing basis, BID provide support on a range of issues such as problems with bins, road closures, tensions with neighbours or liaison with the local authority.
- Pro-active approach to vacancy reduction by advertising vacant properties, conducting viewings and supporting business new starts has contributed to the vacant shop rate dropping from 15.15% in November 2015 to 6.84% in October 2019.



Elgin Gift Card Launch

7 Social Economy

The social economy of Moray continues to thrive, develop and grow and is displaying its truly innovative character at a time of continual change when all sectors are facing challenge. Diminishing resources made available for investment in the third sector by public sector organisations presents a key challenge however there remains recognition by public sector partners and by the wider community of the contribution that the third sector can make to the design and delivery of public services as well as the contribution to the wider economy of Moray. Capacity also continues to be a challenge for the sector therefore **tsiMORAY** intends to continue to play a leading role in developing community and third sector capacity, by continuing to provide leadership, training opportunities, and support for third sector organisations to secure funding and other resources.

Reducing public sector budgets has brought with it proposals to close down community halls and centres in many local communities. This has brought communities together establishing local groups to take up new opportunities provided under the Community Empowerment Act in initially leasing then potentially taking over these buildings as Community Asset Transfers. These groups will require ongoing support which they are currently receiving mainly through the Community Support Unit of Moray Council and the Community Ownership Support Service of Development Trust Association Scotland.

Support for the Social Economy 2018/19

As pressures on public sector budgets and services continued, communities, voluntary groups and social enterprises have been making an ever-increasing contribution to Moray's social and economic development.

Community groups across Moray have taken on the running of many town halls and community centres, mostly through the use of Community Asset Transfers, and have been providing services helping to meet the needs and aspirations of their own communities.

Services provided by Moray's third sector continue to both help meet the basic needs and improve the quality of life of all age groups in Moray, from children's nurseries to old people's care homes, from food production and distribution to addiction services and waste minimisation.

Supporting the ongoing development of the capacity and influence of the third sector and the wider social economy of Moray remains the key focus for the local third sector interface, **tsiMORAY**, which delivers that support under four key headings:

- being a central source of knowledge for and about the third sector in Moray
- ensuring a strong third sector voice in local planning and decision-making
- developing the capacity of volunteering, community groups, voluntary organisations and social enterprises to achieve positive change
- providing leadership, vision and coordination to the local third sector to better respond to local priorities, including through partnership and collaboration.

Central Source of Knowledge:

A new **tsiMORAY** website was launched in January 2019, providing information and links to support day to day activities of third sector groups and organisations as well as to promote specific current events and activities, including training and learning opportunities and updates on initiatives such as Volunteers Week or Participatory Budgeting.

The new website is much easier to navigate, is mobile friendly and has additional features that were not previously available including:

- a new volunteering search tool enabling individuals to identify and register their interest in specific volunteering opportunities
- a forums & networks section, enabling groups and individuals to access information about thematic third sector forums like the children & young people third sector forum and the health & wellbeing forum
- a training & events section enabling people to find and register for upcoming events such as learning opportunities and conferences.

Complementing these features, a 'Community Explorer' widget enabling individuals to search through a map-based database of local services is also under development. This will draw on data and insights captured in **tsiMORAY**'s new management information system.

The new system is also intended to capture and collate up-to-date key data about the economic and social impact of the social economy in Moray, which has not been analysed since a 2010 study set the sector's annual personnel impact (including both paid staff and volunteers) at over 4,000 FTEs (Full Time Equivalents) with an associated impact of over £69M, additional direct spend in the local economy of over £14M, and a total of 650 indirect and induced FTEs with associated earnings of over £13.5M, all excluding the significant contribution made by housing associations.

Voice:

A 'Future Governance Forum' was launched in November 2018, joining the four existing thematic forums and networks facilitated and supported by **tsiMORAY**: Health & Wellbeing Forum, Children & Young People Third Sector Forum, Moray Social Enterprise Network and a Volunteer Managers' Network. During 2018/19 **tsiMORAY** facilitated over 20 sessions across these five themes, in addition to two peer learning visits.

All five forums and networks have seen growing engagement and strong sectoral attendance, particularly at developmental sessions involving guest speakers from both local and national bodies. A particularly successful combined event focused on 'Marketing & Messaging' attracted over forty participants from across the social economy, helping local social enterprises and voluntary sector organisations to review and re-energise their branding.

Thanks to forums and networks, the third sector's voice continues to contribute to thinking and decision-making within the Community Planning Partnership, the Integration Joint Board, the Chief Officer Group and other partnership groups linked to children and young people's services, the Moray Alcohol & Drugs Partnership, the Community Learning & Development strategic partnership, the Northern Alliance, the Moray Economic Partnership and a number of other key strategic groups.

The sector also fed into the development of the new Moray Economic Strategy, which recognises the contribution the local social economy makes to the strong, cohesive, welcoming and ambitious empowered communities which are the cornerstone of a successful Moray, able to attract and retain visitors and talent. As captured in the Strategy's quote of the Tomintoul & Glenlivet Development Trust's ambition: "We are driven by the desire to live in a vibrant and sustainable community. Acquiring assets and enhancing our cultural offering will be at the heart of our activities over the next 10 years. We want our visitors to have the best experience in our fantastic landscape."

Capacity Building:

Both volunteer managers and those wishing to volunteer are supported by the improvements in the **tsiMORAY** website, which enable volunteer opportunities to be promoted quickly and effectively, whilst enabling individuals to search for their ideal volunteering role online. This in turn enables higher-capacity volunteers to identify suitable opportunities for themselves, allowing support to focus on those with higher needs.

Support continues to be provided on a 1 to 1 basis for individuals, groups and organisations in relation to getting started and setting up new third sector organisations, developing governance, attracting funding, and becoming more enterprising as opportunities for funding reduce.

In addition to 1 to 1 support, **tsiMORAY** also provide a learning & development programme, delivering sessions on a variety of topics to support development and build capacity of our many stakeholders. Sessions delivered over the 12-month period included topics from Employment Law to Getting started in Quality Assurance and the Protection of Vulnerable Groups (PVG). It also included governance sessions such as Roles & Responsibilities of a Trustee and an Introduction to Fundraising. During 2018/19, **tsiMORAY** hosted 21 different sessions with 272 individuals from 68 different organisations, with participants providing very positive feedback as to the impact of the sessions.

Connect:

Peer learning opportunities enabled local social entrepreneurs to visit the new Findhorn Hive – a collaborative working space for local and social enterprises – as well as a range of Social Enterprises in Dundee, a city experiencing profound transformation and benefitting from a thriving social economy.

The sector's 2019 annual networking conference, Join The Dots, was again held in Elgin, focusing on the theme: 'Whatever the question, community is the answer'. The conference new format enabled greater networking and discussion opportunities among delegates. Inspired by two excellent keynote speakers, Kosha Joubert, Executive Director of Global Ecovillage Network, and Alice Thompson, Co-founder of Social Bite, discussion focused on the role of the third sector in improving community resilience.

Other developments:

In the 2018/19 round of Participatory Budgeting (PB) delivered by **tsiMORAY**, 23 projects were supported through the '#YouChoose3' programme. The total funding allocated through small grants for local initiatives and projects across the two themes of 'Be Healthy' and 'Connecting Our Communities' was £23,000.

While the investment made through PB is small in purely financial terms, these small grants can make a significant difference in local communities, and the process helps to "increase the level of influence and control that local people have over the decisions and services that impact on their lives", which is a key theme of the new Moray Economic Strategy. It also enables community capacity-building support to be focused where it can have the greatest impact.

#YouChoose3 was a finalist in the National Health Awards 2019, having been recognised as an innovative way for people to share and build capacity.

'We Make Moray', the place partnership jointly funded by Creative Scotland and Highlands & Islands Enterprise, continued to support the implementation of the Moray Cultural Strategy, directed by the needs and aspirations of the creative sector. A peer learning visit to Dumfries & Galloway provided fresh inspiration for participants to bring back to Moray and stimulate further developments in this vibrant sector.

Moray LEADER awarded funding to fourteen new projects during 2018/19. Combined, these funding awards totalled in excess of one million pounds. This investment will deliver a lasting legacy for rural communities across Moray. Projects were approved from community organisations and small enterprises in communities including Findhorn, Buckie, Dallas, Lossiemouth and Keith.

These funding awards included four cooperation projects, delivered in collaboration with partners from other LEADER territories. Including Foraging Fortnight, a project which has created a new, inclusive Scottish wild food festival, and which is delivered in partnership with four other Scottish LEADER areas.

During the final few months of 2019, Moray LEADER allocated its full project budget and subsequently successfully bid for additional funding redistributed from other LEADER areas, to support further projects in Moray.

The decisions to fund projects are taken by the Moray LEADER Local Action Group (LAG), which is a partnership made up of representatives of the public, private and third sectors, and also independent representatives from across Moray. The Moray LEADER staff team work closely with the Moray LAG to develop projects and deliver against the Moray Local Development Strategy.

Moray remains the only area in Scotland where the LEADER Programme is managed by a third sector organisation (**tsiMORAY**).

In October 2017 a new joint Arts and Culture development for Moray Communities came into effect. **Moray Place Partnership** is a project developed through collaborative working over several years involving a steering group of local stakeholders, Highlands and Islands Enterprise (HIE), Creative Scotland and **tsiMORAY**. The Partnership is designed to encourage and support local organisations to work together in the community, making significant interventions to help strengthen creative development in the area. Led by a stakeholder group, made up of individuals in the community from the arts and culture sector, the project aims to build on the Moray Cultural Strategy which presents a series of opportunities for building a strong creative sector in Moray. A three-year plan has been developed by the Moray Place Partnership following consultation with the culture sector, third sector, education, businesses and artists in Moray.

Community Asset Transfer

Ownership and control of land and buildings is a powerful tool for communities to drive forward change and achieve their own goals. Community controlled property can provide a base for activities and services that might not otherwise be accessible to members of that community while providing jobs for and bringing income to the community.

Successful asset transfers can provide stability and sustainability for communities and community organisations, while allowing them to develop new initiatives, support other developing groups and create a strong sense of community identity, cohesion and involvement.

At a time of financial austerity, community asset transfer increasingly provides an important means of ensuring the continuation and development of sustainable services. This was demonstrated during the Council's 2018-19 budget consultation exercise, when the Council sought the views of the community on the closure of town halls and community centres in Buckie, Cullen, Dufftown, Elgin, Findochty, Forres and Keith. Communities came forward quickly and, with the support of Council staff, arrangements were put in place to enable them to take over management responsibility for each facility while they develop their proposals for a full transfer. The first formal asset transfer request under these arrangements was approved by the Council on 2 October 2019 with more requests expected to come in over the next 12 months.

Morayvia, who were recently awarded the Queen's Award for Voluntary Services in recognition of their exceptional service to their community, were successful in their bid for a community asset transfer of the former Abbeylands Primary School in Kinloss, taking over ownership on 5 October 2018. Other successful transfers included Action Marine Park taking over Marine Park, Lossiemouth, on 5 June 2019. The Council is currently working with a wide range of community bodies in relation to their interests in taking over various facilities, such as public toilets, playing fields, parks and bowling greens.

As budgetary constraints continue to bite, community asset transfers will play an increasingly important role in ensuring stable and sustainable communities.



European Maritime & Fisheries Fund (EMFF)

The Highland & Moray Fisheries Local Action Group (FLAG) helps to deliver a community-led approach towards the sustainable development of fisheries areas under the European Maritime and Fisheries Fund (EMFF) 2014-2020. Within Moray in 2018-2019 the fund has awarded almost **£150,000** across 3 projects that support its main themes:

1. Stronger and more resilient fishing communities
2. A sustained, growing and diversified marine, coastal and aquaculture economy
3. Improved understanding of marine environment and management of resources

Full details are available at

<http://www.highlandmorayflag.co.uk/>

CASE STUDY

Scottish White Fish Producers Association - Burghead, Moray



Fishermen have to consider many factors to allow them to go to sea, the weather, the tides, but what about “when can I re-fuel?” At Burghead harbour, fuel was delivered by tanker once a week meaning fishermen had to plan their trips around this, often losing out on crucial sea time as a result. To tackle the problem a small group of fishermen from the SWFPA Burghead & Hopeman branch applied to the FLAG for the installation of a fuel tank at the harbour to allow fishermen 24 hour access to fuel. Since becoming operational a total of 28 vessels have signed up to use the facility, each being issued their own key fob to allow quick and easy access.

Total Project Costs: £27,747.32
FLAG Funding: £20,810.50

European Funding

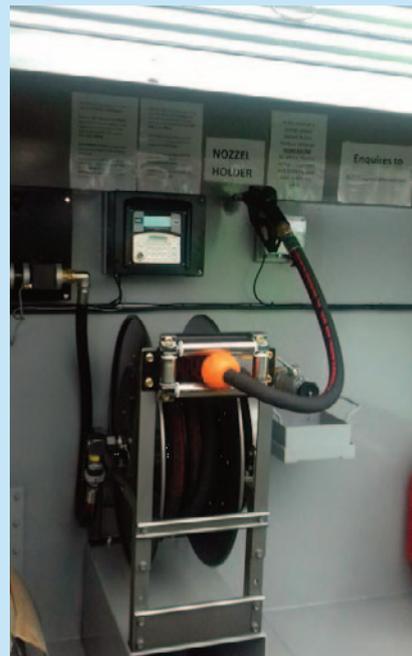
The Economic Development team provides support for developing, securing and delivering work European funded projects and programmes, such as the European Fisheries Fund.

Poverty & Social Inclusion (part-European funded project)

This project provides one-to-one advice and assistance for clients who are facing problems with debt, benefits and finance. It is part funded by the European Social Fund. Its criteria stipulates that clients must be from one of three household types: workless; lone parent; or low income.

During the year to 31st March 2019, 268 eligible clients were advised. 131 of those clients were deemed to have had their debt barrier removed, meaning that they received a boost in annual income of at least £1000 thanks to the help of the project. Also, clients gained a total of £1.3 million in extra income as a result of the assistance received (much of this income was from benefits which they are due and were helped to access).

European funding has also been successfully applied for to extend and increase the project until March 2023.



8 Education and Social Cohesion

Sustainable Education

The reviews of each ASG against the Schools for the Future Policy has continued with Milnes ASG being the only one currently outstanding. The information provided by the reviews form a baseline of evidence to feed into a new Learning Estate Strategy currently being developed.

The challenges of the Learning Estate and impact of a make do and mend policy remain complex and unaffordable. Although the Council has now ended the make do and mend approach it will be 2021 before new programs of work can be developed to refurbish and upgrade schools to a B/B standard for suitability and condition.

The new Learning Estate Strategy needs to take cognisance of the Scottish Governments Learning Estate Strategy launched in September 2019. Achieving B/B standards with a low carbon estate and digital infrastructure will place enormous pressure on the Councils capital plan and finances and may take 15 years or more to achieve and may not be achievable without Scottish Government funding to support the program.

The need to meet growing pupil numbers in Elgin, Forres and Buckie will remain a challenge and will require new builds and rezoning to accommodate future demand.

The new Lossiemouth High School and Linkwood Primary projects are progressing as scheduled and work is commencing on the provision of a new primary school at Findrassie, Elgin.

Reducing Inequalities

The Local Outcomes Improvement Plan (LOIP) has been developed by community planning partners and was approved by the Community Planning Board, Spring 2018. This focusses on addressing inequalities of outcome across the Moray area focussing specifically on raising aspirations for all.

As set out earlier in the report, our main priority areas have been identified:

- Growing, diverse and sustainable economy;
- Building a better future for our children and young people in Moray;
- Empowering and connecting communities; and
- Changing our relationship with alcohol.

Population and Age Demographics

On 30 June 2018, the population of Moray was 95,520 which was a decrease of 0.3% from 2017. In the 2017 monitoring report population projections from the National Records of Scotland (NRS) predicted that Moray's long term population growth up to 2039 would flat line or even decrease from the current population to approximately 96,000.

The 2019 Monitoring Report stated that members should be wary of long term projections. In a report presented to the Environmental Services Committee in 2004, population projections were of concern as they indicated that Moray's population could fall by 8 percent over the period from 2002 to 2018 to below 80,000. This projection has proven to be significantly incorrect given the current population is 95,520. The most recent population projections from the NRS are as follows; Between 2018 and 2026 Moray's population is projected to increase from 95,520 to 100,251 which is an increase of 4.4%. This compares to a projected increase of 3.2% across Scotland as a whole. This projected increase is different to previous projections and will have implications for local service provision.

A breakdown of percentage change in projected population by age group between 2016 and 2026 shows that the 16 to 24 age group is projected to see the largest percentage decrease (-10%) and the 75 and over age group is projected to see the largest percentage increase (+34.2%). This trend has not changed significantly from the 2017 monitoring report. The projections still indicate that an increasing ageing population in the 75+ category and declining population in the 0 -29 age category is a problem that Moray is going to have to continue to address in the future, particularly in retaining school leavers and graduates.

In 2018 the number of households in Moray was 42,554 which is a 0.7% increase from 2017. This increase in households is expected to continue in the long term.

Projections show that between 2016 and 2026, the household type "Three or more adults" is projected to see the largest percentage decrease (-7.4%) and the household type "One adult, one or more children" is projected to see the largest percentage increase (+29.6%).

This projection trend is similar to the one given in the 2017 monitoring report.

In a report presented to the Communities Committee on 2 April 2019, the Moray Council's Local Housing Strategy 2019-2024 reported that in 2019 there were 13,371 households age 65+ making up 31% of all households. By 2039, this is projected to rise to 38%. The changing demographics with an increasing elderly population will have implications for local service provision such as health care facilities for the elderly and also housing provision. It is likely to put new strains on housing supply and house type provision with a demand for smaller houses, flats, terraced properties, and houses for the elderly including accessible housing.

It also highlights the challenges highlighted with the out migration of younger people with the figures suggesting that many young people move away to enter higher education or to seek other employment opportunities.

9 Natural and Historic Environment

Flood Risk Management

Moray's flood schemes protect Lhanbryde, Rothes, Forres, Elgin, Newmill and Dallas – over 3,000 homes and businesses. Nevertheless surface water and coastal flooding remains an issue.

Working with SEPA, Scottish Water and neighbouring Councils, we are currently implementing the first Local Flood Risk Management Plan under new legislation. We are progressing possible protection from coastal flooding at Portgordon and Seatown, Lossiemouth, and have recently completed high level Surface Water Management Plans for Elgin, Keith, Buckie, Rothes and Aberlour, and Forres. The Council also reduces flood risk by maintaining flood schemes, watercourses and coastal defences.

There is a national recognition that responsibility firstly lies with owners and occupants. People can help protect themselves and be prepared in case they flood, and the Council will help raise awareness and provide advice on what can be done.

Car Parking Review & Action Plan

A parking strategy was prepared and agreed by the Economic Development and Infrastructure Services Committee in October 2017. Additional pay and display locations as well as changes to parking charges were introduced in May 2018. Overall the income and occupancy of car parks has been a success, with Batchen Lane multi-storey car park seeing significant uplift in occupation following the introduction of £1 per day parking at this location.

Waste Management

Moray Council continues to be one of the top performers for recycling out of all 32 Local Authorities in Scotland with a recycling rate of 57.4% for 2018. This is a great achievement and local residents are to be congratulated for their continued support in helping Moray to achieve this performance rate.

However, monitoring of waste presented at the kerbside indicated that significant amounts of recyclable waste is being deposited in the residual green bin. Long term data will be required to provide auditable success but the council is now receiving a dramatic increase in volumes of recyclable material especially that of plastic bottles, cans and glass bottles and jars. Reports from crews also indicate a dramatic increase in the number of recycling bins presented for emptying.

In April 2019 the council introduced a chargeable permit scheme for green waste collections from the kerbside. By August 2019 an additional income of £719,604.00 had been generated from 19,989 permit sales, this being a contributor in terms of helping the council to balance its budget.

Plans for the joint Energy from Waste Facility with Aberdeenshire and Aberdeen City Councils have progressed well and are on target for completion in 2022/2023. Following the recent tender process the successful contractor has been appointed and work began late 2019.

The £3.2million re-development of the Moycroft Waste Transfer & Treatment Centre has significantly progressed following its closure and handover in February 2019. The contract is set for completion in January 2020 and will provide a long term sustainable operation for waste handling within Moray. All operations have been realigned throughout 2019 to cater for the requirements of the service during this transitional period. However, the service is looking forward to implementing long term procedures to ensure adequate handling and reprocessing of all waste generated within Moray.

Energy and Climate Change

As stated previously in June 2019 Moray Council declared a Climate and Ecological Emergency and set a target of net zero carbon emissions by 2030. This includes forming a Climate Change Group made up of officers and elected members to develop, direct and scrutinise a Climate Change Strategy Action Plan with a targeted adoption date of March 2020.

In 2018/19 the Council's carbon emissions for its non-domestic properties amounted to 10,135 tonnes of CO₂e - a decrease of 2,697 tonnes of CO₂e (21%) compared to 2017/18. The following are significant contributory factors to carbon emissions levels:-

- Reduced carbon intensity of grid electricity
- More street lighting provided from LED technology
- Decreased heat requirement due to warmer weather

Over 50 individual energy and water saving projects and initiatives were carried out in 2018/19, including

- Urinal Controls
- Boilerhouse Insulation
- LED lighting
- Building and Energy Management System (BEMS) improvements

Cairngorms National Park

The southern area of Moray, incorporating Tomintoul and Glenlivet, is within the Cairngorms National Park. The Cairngorms National Park Authority (CNPA) maintains a close working relationship with The Moray Council on planning matters, economic development and LEADER projects. Recent visitor surveys have demonstrated a high level of satisfaction and appreciation for what the National Park has to offer. However, there are a number of challenges moving forward including the provision of affordable housing to help sustain local employment.

The Cairngorms National Park represents 6% of Scotland's landmass and is well placed to help tackle the climate change emergency challenges through nature based solutions. The CNPA has started to set out an ambitious vision and programme of action to tackle climate change which is set to be at the core of the next National Park Partnership Plan.

Two million people visit the National Park each year, with research showing an increased satisfaction among visitors generally, rating the Park 9.08 out of 10, compared with 8.87 out of 10 during the same period in 2014. Research confirms that National Park status is increasingly an important reason for people coming to the area, particularly among European visitors.

A new Corporate Plan has been approved for 2018-2022, setting out how the Cairngorms National Park Partnership Plan will be delivered. The main themes within the Plan are Conservation, Visitor Experience and Rural Development. The priorities for Rural Development are;

- Support delivery of housing for local needs through an efficient and effective planning service;
- Support communities, specifically focussing on the most fragile, to deliver their agenda for change, and
- Work closely with the business community and partners to support a sustainable Park economy.

Work has continued on the new Local Development Plan 2020. The Proposed Local Development Plan has approved for consultation by the CNPA Board in December 2018. The Proposed Plan was submitted to the Scottish Ministers on 20th September 2019 for examination.



10 Tourism and Culture

TOURISM AND CULTURE STRATEGIES

Moray Place Partnership

The Moray Place Partnership (MPP) is a partnership project which aims to support the cultural sector in Moray under the banner of We Make Moray.

The project is funded by Highlands and Islands Enterprise (HIE) and Creative Scotland, as part of Creative Scotland's Place Partnership Programme. It was created to encourage and support local organisations to work together in the community to strengthen creative development and widen access to creative activity in the area.

We Make Moray will support individuals, organisations and communities to develop, connect and celebrate creative and cultural activity in Moray. It will do this by creating opportunities for individuals and organisations to develop and make work, as well as supporting activities which widen access to creative and cultural activities. Its main aim is to ensure implementation of the Moray Cultural Strategy by creating strong sustainable partnerships in Moray.

The Place Partnership Co-ordinator is managed by **tsiMORAY**.

During the financial year 2018-2019 the following activities are highlighted:

- The Moray Artists Bursary, a brand-new fund established by We Make Moray was launched in July 2018. 23 applications were received with 10 awards being made.
- The application process for a cross-sector Peer Learning Visit to Dumfries and Galloway was launched.
- Media and Communications contract awarded to Muckle Media to deliver a PR, social media and communications campaign to support the successful implementation and sustainability of the Moray Cultural Strategy.

- The We Make Moray Co-ordinator has continually liaised with private, public and third sector partners and individuals to support the development of initiatives/proposals which will contribute to the delivery of the objectives of the Moray Cultural Strategy.

Tourism Development in Moray Speyside Moray Speyside Tourism

Moray Speyside Tourism (MST) was established in 2014 and operates under the auspices of Moray Chamber of Commerce. MST is the Destination Marketing Organisation (DMO) for Moray and Speyside. The organisation's purpose is to bring more visitors to our beautiful region, positioning Moray Speyside as a world-class destination for visitors from across the globe. MST does this in three main ways:

- Travel industry engagement
- Support for local tourism businesses, including capacity building, training and advocacy
- Consumer focused marketing and promotional activity

The DMO's activities are aligned to 5 'strategic' themes which ensure a clear focus on delivering what visitors want and help to target both consumers and travel trade businesses effectively:

- Action, Adventure and Outdoors
- History, Heritage and Culture
- Landscape and Nature
- Shopping and Staying
- A Taste of Moray Speyside

Moray Speyside Annual Visitor Statistics

Moray Speyside is home to some of the world's most iconic brands. Our coastline is officially recognised by National Geographic as one of the most beautiful on the planet. With dolphins, crystal clear flowing rivers, remote upland landscapes and of course, Speyside's rich and fertile barley fields Moray Speyside offers visitors the very best of Scotland.

Tourism in Moray Speyside continues to grow under the leadership and direction of Moray Speyside Tourism.

Full year figures for 2018 indicate that the economic impact of tourism to the Moray economy stood at £129.6m

- Total visitors to Moray Speyside were 797,880
- Visitor days have risen from 1,874,470 to 1,879,70
- Full Time Equivalent (FTE) employed reached 2,888

Since 2014, MST have worked to grow the volume and value of tourism to the local economy – promoting Moray to visitors from around the world, supporting local tourism businesses and organisations and representing the region’s tourism industry at national and international level.

Moray Speyside Tourism’s funding expires at the end of 2019. To ensure that the progress made under Moray Speyside Tourism can continue and the region’s tourism industry can be confident for the future, a plan has been developed to introduce a Tourism Business Improvement District which will deliver a financially sustainable, independent and accountable future, free from dependence upon public funding and which will give local businesses control over tourism and marketing of our area for the long-term.

If the Tourism BID campaign is unsuccessful, the progress made in recent years will cease and our region will become one of the few in the UK without a Destination Marketing Organisation.

Museum Service

Visitor figures to the Museum and Local Information Point increased from last year with 6294 direct visitors (April – October inclusive). Indirect users, including enquiries, group visits and events totalled 39,531 and Facebook and website hits and enquiries totalled 44,337 to the end of March 2019.

Community partnerships have been created and strengthened as the Museum has worked with local, national and international institutions including National Libraries of Scotland, Glasgow School of Art and Findhorn Bay Arts. Full Accreditation with Museums Galleries Scotland was retained. The Museum also retained 5 star Visitor Attraction status with VisitScotland for the eighth year.

Birds and Wirds

Our exhibition for 2018 was entitled ‘Birds and Wirds’ and showcased the Falconer Museums’ fine collection of birds from around the world. It also took a wee ‘keek’ at the rich language of Scots by adorning the display cabinet with hand painted Scots sayings and words.

Inspiration for the exhibition came from the newly adapted edition of the ‘**Book of the Howlat**’ by James Robertson which was based on an Older Scots poem written in the 1440s by Richard Holland. Set in and around Darnaway Castle, the beautifully illustrated book tells the tale of a young owl’s borrowed feathers, his pride and ultimate fall. The exhibition complimented an outdoor theatre production of the story, created by Findhorn Bay Arts.



Jane Johnston of the Friends kindly made some truly delightful birdy dressing up costumes and masks which were enjoyed by our young visitors. Family drop-in craft sessions held in the school holidays were very well attended and enjoyed by all.



84 people attended the Festival of Museums weekend in May. The service hosted '**Scots Story Stramash**' with renowned storyteller Douglas MacKay who enchanted the audience with tales of beautiful birds followed by some lovely hands on birdy craft sessions provided by local artist Marion Normand.

Outreach work continued throughout the year and staff attended local events, ran store tours, visited groups and coordinated the ever popular loan box scheme.

The Friends of the Falconer Museum enjoyed participating in Doors Open Day for the first time and delivered a very successful Winter Talks Programme. Many were also involved in helping with the excavation work during an archaeological dig on the top of Cluny Hill and the Museum store was used for post-excavation work including preparing samples to be sent for radiocarbon dating. The Friends continued to meet weekly as volunteers to help the Museum Service with collections care and conservation.

Moray Film Liaison Service

During this period, the service supported approximately 1000 enquiries relating to film, documentaries, including commercials music videos etc., from film companies looking for specific locations, and properties etc.

This industry often works to tight timescales, deal with last minute changes and working to tight budgets etc. Whether it be identifying a location or making arrangements for a road closure etc., officers provide free and confidential advice and information tailored to meet specific deadlines.

The Service liaises with Creative Scotland, as part of the Scottish Locations Network where areas can work together and share knowledge, as it is often the case that locations are requested from a few areas, therefore a joined up approach enables film companies get as much information as possible to carry out a successful shoot.



Moray Events

In June, 2018, in the natural “amphitheatre” of Grant Park, Forres, Piping At Forres saw its last instalment of the European Pipe Band Championships of a six year run. One of Moray’s biggest events with audiences of up to 20,000 each year, this was truly a great spectacle with the sight and sound of hundreds of pipers and drummers. The event will continue in Inverness until 2021 and it is hoped that it will return to Moray again sometime in the future.



Moray has a wealth of events each year, and in 2018, featured the Gordon Castle Highland Games and Country Fair. It is also proud of its food and drink production and its music culture too.



Some of these examples include the International renowned Whisky Festival a worldwide stage for whisky connoisseurs’ and enthusiasts alike; and the Spirit of Speyside: Distilled 2018 event which brought together some of the best food and drink Moray has to offer. Seafest, in Lossiemouth has continued to grow from strength to strength with their one week festival which showcases, food, drink music and a wealth of activities and the 23rd annual celebration of traditional and contemporary Celtic music - Speyfest has been hailed as the biggest and best yet by organisers.

Moray Council Assets’ Coordination

A commercialisation strategy is going through the approval process and a shortlist of potential income generating projects has been drawn up with sponsorship of parks, leisure facilities and promotion of leisure and community facilities being prioritised. Work with the leisure service to increase Fitlife memberships through a new corporate and tourist membership offering is being launched in the new year. Marketing and promotion of existing income generating schemes, such as offering MOTs for staff and the public, is also key to succeeding in maximising income where capacity allows.

Alongside this work, bringing surplus council buildings and land into income generating use has been and remains a priority before they are potentially disposed of as a capital receipt. The potential for future large scale projects include working on investing in harbour areas to bring buildings into retail, office and self-catering accommodation use transforming the harbour trail along the Moray coast; working with Moray Speyside Tourism to create a film hub promoting use of Moray as a TV and film shoot destination.

Key to ensuring future income generating success will be better management and coordination of an events officer role within Moray Council to co-ordinate use of parks, buildings and space in Moray for events. An events policy and fee structure is being drafted in 2020 with a view to introducing charges in 2021.

The plans for the cultural quarter as part of the Moray Growth Deal provides even more opportunity for event promotion and income to be generated for Moray Council, however the running of Grant Lodge as a venue and Moray Council retaining ownership of Elgin Town Hall in order to maximise this opportunity would be preferable.

Event Liaison

The Economic Development team in consultation with other Council departments and external agencies, provide advice to event organisers regarding a wide range of events.

Through a good process of communication which has been established over the years, event organisers are able to get the appropriate advice and expertise tailored to their event planning which includes for example health and safety issues, legal and licensing, road closure to environmental health etc., to ensure that events are both safe and enjoyable for visitors attending.

Moray Doors Open Day September 22, 2018

This is a Scotland wide project with events happening throughout each September and is supported nationally by the Scottish Civic Trust. The aim is to give members of the public a free “peek” behind doors that are normally closed into buildings that are of cultural and/or historic significance. This year 12 venues were open to the public plus there were 3 guided heritage walks in Elgin, Lossiemouth and Burghead.

Venues included Ramsay Macdonald’s house in Lossiemouth and Austin’s Tearoom in Elgin (with servers in period dress!). There was a total of 1613 people attended the day and thanks must go to the 78 volunteers who helped make this a memorable event. Very positive feedback was received including one visitor from Portugal who had visited Nelson’s Tower in Forres and wrote “Wonderful! Staff so helpful and friendly”



11 Local Performance Indicators

The following has been devised as a set of local indicators of the state of the local economy. Community Planning Partner, Skills Development Scotland collates a broad range of statistics including economic data and publishes this annually in support of the Regional Skills Assessment.

A summary data set will be included when the Moray Economic Strategy is refreshed and will likely replace the following.

Indicator	Moray 2016/17	Scotland 2016/17	Moray 2017/18	Scotland 2017/18	Moray 2018/19	Scotland 2018/19	Moray %change (2018 to 19)	Scotland %change (2018 to 19)
Number of Building Warrant Applications	882	37,556	928	40,213	892	39,159	-3.88%	-2.62%
Number of Planning Applications	596	26,990	654	26,220	542	25,244	-17.13%	-3.72%
Private Housing rental (2 bed av mean monthly rents)	£575	£643	£583	£652	£601	£668	3.09%	2.45%
Average House Price	£154,241	£166,734	£160,229	£175,229	£166,127	£178,993	3.77%	2.17%
House Sales	1,749	99,972	1,705	102,357	1,687	101,587	-0.76%	-0.60%
Number of Enterprises	3,195	174,625	3,195	174,229	3,250	177,075	1.72%	1.34%
Population	96,070	5,404,700	95,780	5,424,800	95,520	5,438,100	-0.27%	0.25%
Gross Weekly Pay by workplace (all full time workers)	£498.10	£547.30	£549.80	£563.20	£569.90	£576.70	3.71%	2.42%
Gross Weekly Pay by residence (all full time workers)	£497.90	£547.70	£527.20	£562.70	£561.60	£577.70	6.53%	2.67%
% workforce in private sector	81.3%	74.1%	78.80%	74.70%	81.7%	74.3%	3.68%	-0.67%
New businesses were supported to start-up with one-to-one advice	132	10,629	128	9,129	132	9,083	3.13%	-0.50%
Job Seekers Allowance Claimants /March	849	51,893	817	45,633	370	25,534	-54.71%	-44.04%
Out of Work Benefits All Claimants	1,270	83,590	1,210	88,915	1,530	107,760	26.45%	21.19%

