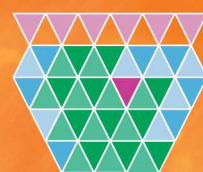




MORAY ECONOMIC DEVELOPMENT  
**ANNUAL REVIEW**  
**2017/18**

Photo to follow



**moray**  
council



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*Restored Fountain, Elgin*

*Front cover: The Macallan Distillery - © Ian Bevan, Magnum Photos*

# 1 Introduction

I'm delighted to introduce you to the latest Economic Development Annual Review for Moray, 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 2018 and beyond is also provided where this is helpful.

During 17/18 work continued to develop Moray Growth Deal, with the business cases required for each project taking shape. At its heart the Growth Deal is a programme of projects and so each project has been developed with the deal framework – the vision, pillars and key objectives – firmly in mind. During the year public consultation was undertaken on this framework and this showed an 83% approval rating – a strong sign that the workshops and other engagement undertaken in 16/17 was time and effort well spent. Since then formal negotiations on the deal have been opened with both governments and these are likely to take us into the next financial year before the next stage in the process – Heads of Terms, or an agreement in principle – is reached.

Following on the analysis done to support the developing Growth Deal, work continued to update and refresh a host of other policies relevant to economic development including The Local Outcome Improvement Plan for Moray which focusses on reducing inequalities, the Moray Council Corporate Plan 2017-2022, the Skills Investment Plan for Moray, Moray Economic Strategy and Moray Local Development Plan 2020. The coordinated work needed to deliver on the aims and objectives set out in these policies across the community planning partnership is now well underway.

Meanwhile work on the expansion programme progressed apace at RAF Lossiemouth with a £100million private investment by Boeing in the expansion heralding an opportunity for Moray to work

with both the MOD and the Aerospace industry to develop skills and jobs for Moray. This is now being progressed with support from the University of Highlands and Islands and other stakeholders.

Finally, work at Barmuckity Business Park began following lengthy negotiations to ensure the park would be viable. This need for this employment land was acknowledged as far back as 2012 when the first Moray Economic Strategy was written, so finally delivering on this was a significant achievement for all involved including Highlands and Islands Enterprise who provided grant funding and the council's Development Planning team who worked with the developer to create a Development Framework for the site.

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.



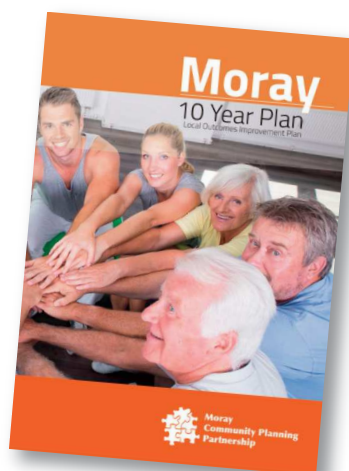
**Rhona Gunn**

*Corporate Director*

*(Economic Development, Planning and Infrastructure)*



## 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 previous community plan. 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 partner agencies can add greatest value by working together 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 co-ordinating 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 each of the priorities 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

The Moray Economic Strategy was adopted by the Community Planning Board in 2012. The strategy provides a policy framework for the public and private sectors with the primary objective to grow and diversify the economy. Following consultation with partners a refresh of the strategy is scheduled to be completed in 2018 to reflect changes since 2012 and also to support the developing bid for Growth Funding from the UK and Scottish Governments known as Moray Growth Deal. The revised strategy will be built around improving performance relative to four areas:

- Qualification levels
- Business Growth
- Talent Attraction
- Business Competitiveness

### Moray Economic Partnership

The Moray Economic Partnership (MEP) Board meets four times per year. The partnership is guided by the objectives and outcomes included in Moray 2026 and now the LOIP which were in turn partially drawn from the Moray Economic Strategy. During 2017-18 the partnership advanced various initiatives and projects including but not limited to:

- Continued development of a Moray Growth Deal Bid
- Agreed to support the expression of interest for Greater Places funding
- Provided input to the Moray Local Outcome Improvement Plan
- Considered the Talent Attraction & Recruitment Strategy work commissioned by HIE
- Supported the preparation of the Moray Skills Investment Plan and associated Delivery Plan
- Considered the progress of Mobile Phone & Broadband Infrastructure provision across Moray

- Supported Scottish Apprentice Week
- Maintained a dialogue and support for the MOD on operational plans and development that benefit the economy and
- Supported the 4th Annual Moray Business Week.

Additional information is posted on the MEP page of the Your Moray Community Planning Partnership website

[http://www.yourmoray.org.uk/ym\\_standard/Page\\_104963.html](http://www.yourmoray.org.uk/ym_standard/Page_104963.html)

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



### **Moray Council Corporate Plan**

The Corporate Plan for 2018-2023 was approved by the Council on 14 February 2018. It sets out the Council's priorities, values and plans for the future. It also provides the context for implementation, the constraints within which the council must operate;

the challenges and pressures and the organisational change required to successfully deliver the priorities. It provides a link between the national priorities, the Moray Community Planning Partnership's plans and the Council's own plans and priorities so that these can be cascaded into actions and delivery within service plans. This first iteration of the Corporate Plan starts to identify what the Council will be doing over the next five years to contribute to the Moray 10 Year Plan Local Outcomes Improvement Plan and to address the specific priorities of the Council.

The aim is to create the right environment for people to do well and reach their potential. The Council's priorities in delivering this are to:

- Ensure caring and healthy communities
- Promote economic development and growth, and maintain, and promote, Moray's landscape and biodiversity
- Provide a sustainable education service aiming for excellence
- Work towards a financially stable council that provides valued services to our Communities

In terms of the priority to "Promote economic development and growth, and maintain, and promote, Moray's landscape and biodiversity". The corporate plan identifies the following Challenges and Opportunities:

"The Moray economy performs well in many areas, with comparatively low unemployment, few areas of significant deprivation, strong survival rates for new businesses and encouraging growth in key sectors such as construction. There are a number of opportunities that have been identified for development. We aim to increase our wage and qualification levels and to improve pay levels and job opportunities for women in Moray, which are often poor compared to those for men. We will also work to create an appealing environment for young people where the trend is of outward migration, with many more leaving and failing to return than those we successfully attract into Moray from other areas. Given the higher than average growth in our elderly population, this creates challenges in terms of our working age population."

The Plan states that: "Economic development cannot be delivered by any one agency. It requires concerted action in pursuit of a shared vision. This is provided in Moray by Moray Economic Strategy and its delivery body Moray Economic Partnership. A key aspect of future activity will be the Moray Local Development Plan 2020 and Moray Growth Deal, our version of a City Deal, both currently in development. Each draws upon contributions across the various council services such as education and housing, as well as work by community planning partners including work to implement the LOIP priorities."

This report identifies some of the activities undertaken in 2017-18 that are already contributing to the delivery of the Corporate Plan vision.

### 3 Inward Investment and Development

In March 2018 the RAF Lossiemouth Development Plan was publicised with community presentations outlining the content and provisional schedule for development at the base to station 9 P8 Maritime Patrol Aircraft.



*Artist's impression of P-8A © RAF*

The developments at RAF Lossiemouth which are valued at in excess of £400 million are likely to bring over 500 further service personnel, with dependents and supply chain employees in addition to that. The stimulus which this will provide to the local economy is to be welcomed, but it will also bring challenges in terms of the supporting infrastructure for housing, schooling etc. and officers are working closely with the MOD to plan for this.

The continued influence of the MOD and the need for Moray to be competitive as a location for business makes it important to pursue any opportunity to support the economy. As such the Council working with its Community Planning Partners has been developing a Moray Growth Deal Bid.



#### **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 the Summer of 2017 the process to build understanding and support began with a public engagement campaign and an initial summary document known as a Statement of Intent was published. Support for the growth deal framework – vision, key objectives and success measures – was strong with an approval rating from a public survey of 83%.

During the Autumn and Winter of 2017 one to one and group engagements were held to achieve endorsements and show support from local businesses. A Growth Deal Business Assembly has been formed to guide and support the bid and held its first meeting in June 2018.

During 2018 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; this has enabled partners to continue working to strengthen their business cases.

In October 2018 the Chief Secretary to the Treasury, Liz Truss MP gave the political “green light” for partners to progress negotiations for a deal, and a reference to a Moray Growth Deal followed in the Autumn Budget statement from the Chancellor of the Exchequer. Progression to the initial agreement stage (known as Heads of Terms) is provisionally targeted to conclude between April and December 2019. This is flexible depending on a number of factors. This agreement would set out the projects which would be funded within the deal in broad detail.

At present, high level valuations for the twelve projects proposed to sit within the deal total in excess of £200 million. However, all bids to date have achieved only a proportion of the funding bid for and so the final level of funding is not yet clear.

*David Mundell, Secretary of State for Scotland visit to Moray Council April 2018*



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.

### **i) Moray Local Development Plan (MLDP)**

The Moray Local Development Plan was adopted in 2015. It sets out a range of policies against which to assess development proposals, with the aim of directing the right development to the right place and safeguarding Moray's environment. The Plan identifies a generous supply of land for housing and employment development with further reserve supplies available, which can be brought forward if required. The Plan is a vital aspect of supporting and facilitating economic growth.



Work has progressed to develop the next Local Development Plan which aims to provide a minimum of 15 years land supply for housing and employment purposes. The new Plan will also refocus the role of the planning service as an enabler of development, with a greater focus on quality outcomes, infrastructure co-ordination and delivery.

The Main Issues Report identified 9 main land use planning challenges facing Moray and was made available for public consultation from early January 2018 to the end of March 2018. Over 400 responses were received and over 950 people attended a series of drop in exhibitions, which aimed to highlight the positive benefits of good planning.

Responses have been analysed and have shaped the Proposed Plan which will represent the “settled view” of the Council. It is anticipated that consultation on the Proposed Plan will take place from early January 2019 to the end of March 2019.

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.

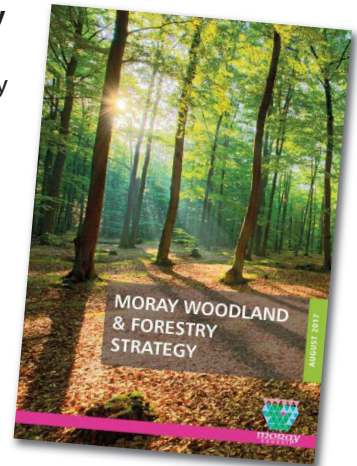
Quality development and a quality environment support economic development and Embedding placemaking in policy will help deliver more attractive, active, integrated

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 has been prepared. 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 the completion of a feasibility study for the upgrading and development of the Moray Way.

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 and 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.

Having an up to date Moray Local 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 this 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.

At the end of 2017 two projects were short-listed for national Planning awards for work done in 2016-17 for Refurbishment of Victoria Cottages in Elgin Conservation Area creating a new mixed use creative learning/art space utilising a Category A listed building at Altyre Estate.

### Building Standards

In 2017/18 the Building Standards Service received 985 applications for Building Warrant and 1224 submissions for Completion Certificates. The value of building work processed by the Service was £99.3M which is £10M more than in the previous year. E-Building Standards was introduced in August 2016 and during the year 2017/18 77% of our applications were received electronically via the online portal.

*Glasgow School of Art at Altyre Estate*





## CASE STUDY THE MACALLAN DISTILLERY

On 2 June 2018 The Macallan launched its new distillery and visitor experience. Located on the Easter Elchies estate, it is the first distillery on Speyside to be designed by an internationally acclaimed architect, Rogers Stirk Harbour and Partners, who were selected to lead the project after an international competition.

International business Edrington is investing £500 million in the brand of which the £140 million distillery is the centre piece. This programme increases investment in whisky, warehousing, and particularly in The Macallan's signature sherry-seasoned oak casks.

Economic Development and Planning staff began discussions with Edrington in 2011 for this investment; work included facilitating conversations with local community representatives and helping to chart the course of development regulation. This included assessment to ensure the development assimilates within an area designated as of great landscape value, protects the environment and amenity and maintains highway safety. New techniques and technologies have been pioneered at the distillery requiring testing to destruction. The standards of finish of the materials used are exemplary to match the product. The undulating timber roof structure is one of the most complicated timber roof structures in the world, comprising 380,000 individual components.



© Ian Bevan  
Magnum Photos

The build began in December 2014. The first whisky ran through the stills in December 2017. Elgin-based Robertson Construction has delivered the complex architectural design, working with 25 contractors to bring the vision for the new distillery and visitor experience to life. During construction, up to 400 people specialising in more than 20 different trades were employed on site.

The new distillery will enable production of The Macallan to increase by a third if required. The new stills were crafted by Rothes coppersmiths Forsyths, who have been making the brand's distinctive, 'curiously small' stills for The Macallan since the 1950s.

[See full article published in Scottish Field 5th June 2018](#)



## **i) Local Housing Strategy**

During 2017/18, the Council's new build programme achieved 47 house completions with a further 68 under construction at year end. The Council also purchased land for 137 houses. The completions contributed to the Housing Business Plan target to build 70 houses per annum over the next 3 years. The new build programme supports the aims of the Corporate Plan by providing new affordable housing for an increasing population and a growing and diversifying economy.

The total amount spent on new Council housing in the financial year 2017/18 was £6.814m. This included £4.412m of Scottish Government grant funding. During the year, housing associations used a further £1.947m of grant funding for new affordable housing in Moray, achieving 72 completions and 22 houses under construction at year-end.

This represents a significant investment in an area 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 made provision for the completion of 231 new Council houses during the period 2018-21.

## **ii) Private Sector Build Out**

The Council prepares an annual housing land audit and is required by Scottish Planning Policy to maintain a 5 year supply of effective land (free from constraints) and to ensure there is a generous supply identified in the Moray Local Development Plan (MLDP). The 2018 Audit shows that the Council has maintained a 5 year effective supply. With an effective housing land supply of 3638 units, which equates to a 6.76 year effective housing land supply. The total housing land supply 2018 (effective and constrained land) is 12,848 units, of which 5,777 units are identified as longer term housing land reserve, which can be brought forward as and when required.

House completions in 2017 were 341, compared with 334 in 2016, 337 in 2015, 311 in 2014 and 295 in 2013. Projected completions are estimated to increase over the next couple of years as sites within MLDP 2015 are built out. The majority of completions in 2010-2017 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.

## **Commercial**

### **i) Industrial Portfolio**

Occupancy rates remain near capacity and the Council is considering further proposals to expand the portfolio to meet business needs. 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.

There remains a lack of serviced sites ready for development. The Council has however constructed roads and services at March Road, Buckie to provide a supply of development sites in East Moray for business seeking to build their own bespoke premises.

The Council is also in discussions with Highlands and Islands Enterprise with a view to acquiring land to provide small serviced development sites and business units at the Enterprise Park, Forres. In addition discussions are being held with landowners in Speyside with a view to identifying suitable land for acquisition and the provision of serviced development sites for small businesses.

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

### **ii) Barmuckity- Elgin Business Park**

There is currently a severe shortage of developable serviced industrial and commercial land in and around Elgin. 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

HIE's area of focus is on private businesses and social enterprises with the ambition to grow and export. The past year has seen a new group of Moray enterprises come into HIE account management, widening the variety and reach of business support by the agency. HIE also seeks out new opportunities for inward investment into Moray, and for new developments which create higher paid employment. HIE investments in 2017/18 include supporting businesses such as Meatsnacks Group, Macduff Shipyards, Kura, Woohaa Brewing Company, Simpsons of Buckie and Christie Elite.

In terms of Strengthening Communities, HIE provides financial support and expertise to social enterprise and community organisations seeking to acquire income generating assets to enable sustainability. During 17/18, a series of small organisations in more fragile communities were supported.

### 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.

During 2017-2018 the following projects have helped to support vibrant town centres  
Markets and non-commercial events are supported in:

- Elgin,
- Forres,
- Buckie,
- Keith, and
- Lossiemouth.

Elgin BID works to improve the local trading environment. See further information on page 20.

The Elgin Conservation Area Regeneration Scheme has provided grants for building repairs and shop front improvement and facilitated improvements to the public realm projects. The Elgin CARS ended in March 2018. See further information on page 26.

The Castle to Cathedral to Cashmere heritage experience route runs through the town centre with interpretation boards and interactive touch screen in the St Giles Centre. See further information on page 29.

*A summary of the 2018 findings are set out in the table below.*

Town	Comparison		Convenience		Retail Service		Leisure Service		Vacancy	
	2018	2016	2018	2016	2018	2016	2018	2016	2018	2016
Elgin	90	86	19	18	51	47	65	65	25	36
Edgar Road	21	20	2	2	2	2	4	3	7	5
Forres	28	29	15	13	27	21	23	25	3	9
Keith	26	27	13	13	13	12	19	18	9	5
Buckie	27	28	8	7	16	15	20	21	10	8
Lossiemouth	10	10	6	6	12	9	21	18	5	8
Aberlour	7	7	4	5	5	4	10	9	1	0
Dufftown	7	10	7	6	4	4	19	18	2	4
Fochabers	9	7	4	4	2	3	9	9	1	1
Rothes	6	7	3	3	2	2	9	9	3	2

## 4 Transport and Infrastructure

### A96 Inverness to Aberdeen Dualing

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. Transport Scotland have identified a series of route corridors that are being appraised. Announcement of the preferred route option is expected late in 2018.

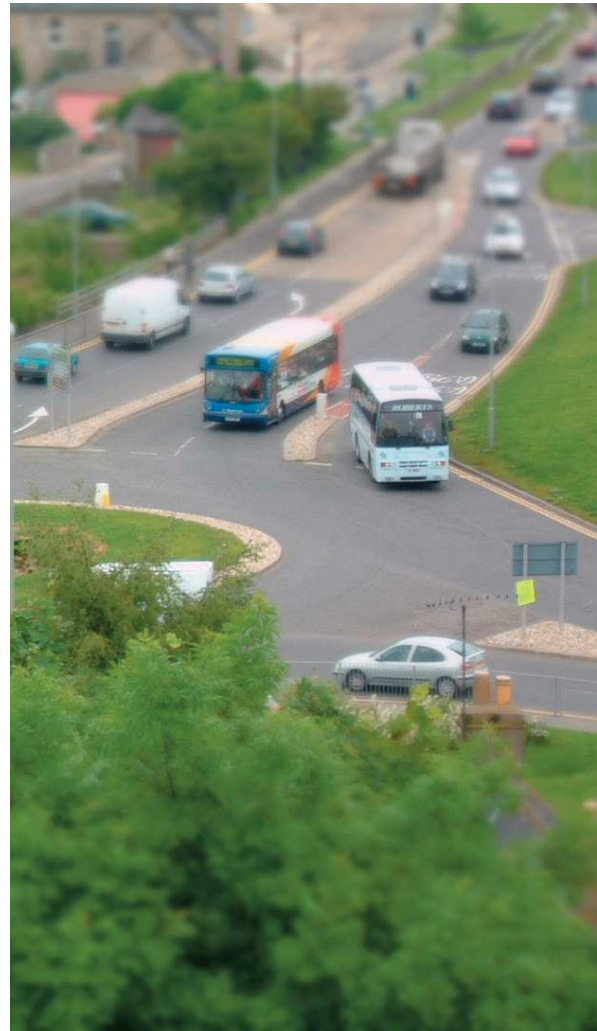
### Elgin Transport Strategy

The Council has recognised the need to plan the transport infrastructure that Elgin requires in order to support development growth and reduce congestion. The first scheme from Elgin Transport Strategy was delivered in early 2018, with the introduction of traffic light junction control at South Street / Hay Street in Elgin. This scheme also provides safer crossing facilities for pedestrians and cyclists.



### Buckie Harbour

The harbour has seen growth in cargo, fishing and offshore related business during 2017/18. The council has applied for funding to support the installation of an ice plant and fuel tank in Buckie Harbour to support the fishing industry. The Council continues to seek opportunities with interested parties to secure a long term future for Buckie harbour.



### Public & Community Bus Transport

In addition to the commercial Stagecoach bus services, the popular council operated **Dial M** demand responsive service has continued to grow. The additional services introduced in 2016 are performing well as part of the service provision.

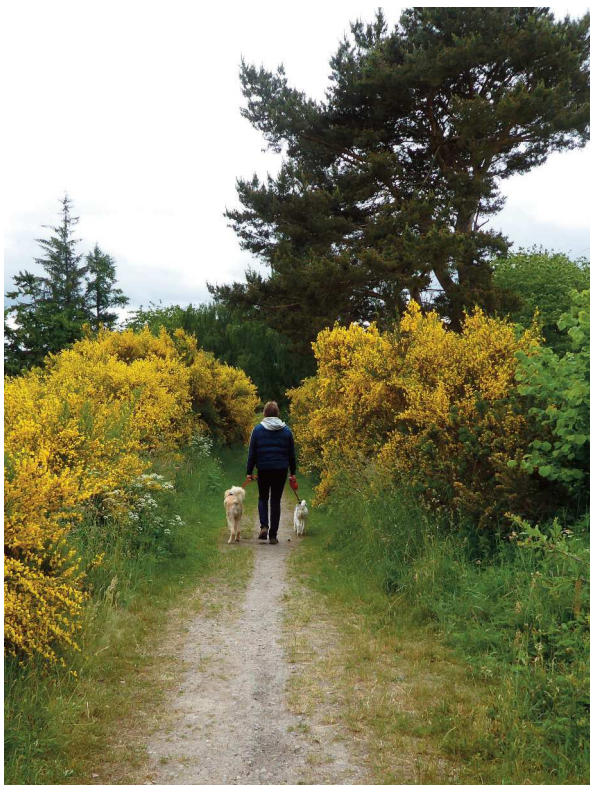
The principal focus of community transport is to minimise social exclusion and provide access to services (particularly healthcare) for people with no other form of transport, living in areas without robust public transport facilities. The Transport Steering Group of Moray Forum is taking a leading role in encouraging and growing community transport across the area. The focus over the last year has been on protecting community links and promoting accessibility.

## Core paths

Development, improvement and promotion of **The Moray Core Paths network** has been modest due to reduced budgets. Nevertheless progress has been made during 2017/18 as follows:

- Moray Walking Festival- the 6th midsummer festival used many of the Core Paths as walking event locations. The Festival is focused on raising the profile of 'The Moray Way' (around 80 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. eg Dramathon
- Core Paths small works winter programme – a range of small scale improvement projects.
- Enabling and support of community path projects. Rothes to Caigellachie 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 is currently reviewing its Core paths Plan with proposals to add over 60 new Core paths and amend many more. Public consultation on this took place in early 2018 with the Council now working to achieve an adopted amended Plan early in 2019.



## 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.

A real boost to low carbon and active travel has come with the confirmation of £800,000 of grant funding to improve the Speyside Way between Craigellachie and Carron to enable cyclists to use the route for everyday journeys. The funding will also enable the installation of additional electric vehicle chargers, which combined with other funding and promotional activity should see a real boost in the use of low carbon transport modes in the Speyside area.

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 will see the Council introduce an electric bus service in Speyside to test the reliability of the vehicles in hilly and wintry conditions, whilst providing enhanced transport provision in the area.

## 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

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 (As of July 2018): 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.

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.

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, with initial timetable improvements commencing in December 2018. In autumn 2017 the major physical works in Moray were completed, including the opening of the new Forres station.

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.

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.

Future funding levels are however uncertain.



## 5 Employment

### Employability in Moray

Employability is about being capable of getting and keeping fulfilling work. In simple terms, employability can be defined as the sets of skills, understandings and personal attributes necessary to gain, sustain and progress further in employment.

Over 2017/18 a review has been underway of the employability landscape in Moray.

The Employability Moray Partnership, reporting to the Community Planning Board has been disbanded and instead a new group – The Employability and Skills Group reporting to Moray Economic Partnership - will now oversee this area. This has been done to reduce and simplify the number of partnership bodies within the community planning structures. A particular focus on young people will remain through the DYW Partnership group.

A refreshed Moray Skills Investment Plan (SIP) has been framed and was agreed in late 2017. Work is currently ongoing on a Delivery Plan setting out how the SIP will be implemented across the community planning partnership.

The SIP 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 2017/18 discussion across partners has taken place to ensure there is no duplication with the Children's Services Plan and Moray's National Improvement Framework. Significant progress has also been made in developing apprenticeship opportunities particularly around Foundation Apprenticeships and creating stronger links with industry.



*Moray Council Apprentices*

### 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.

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

We wish 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 for gainful employment 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.

Moray **Skills**  
Pathway

## 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 in which significant demand is anticipated have been identified including early education and childcare, health and social care, construction, food and drink and the land based sector

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

## Work Placement

Work has been undertaken to review the work related learning pathways in line with the Work Placement, 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. [Career Ready](#) continues to be a significant part of the work placement offer through meaningful work placements, currently 183 young people have engaged in Moray with 99.5% having positive participation.

## Employability (part-European funded project)

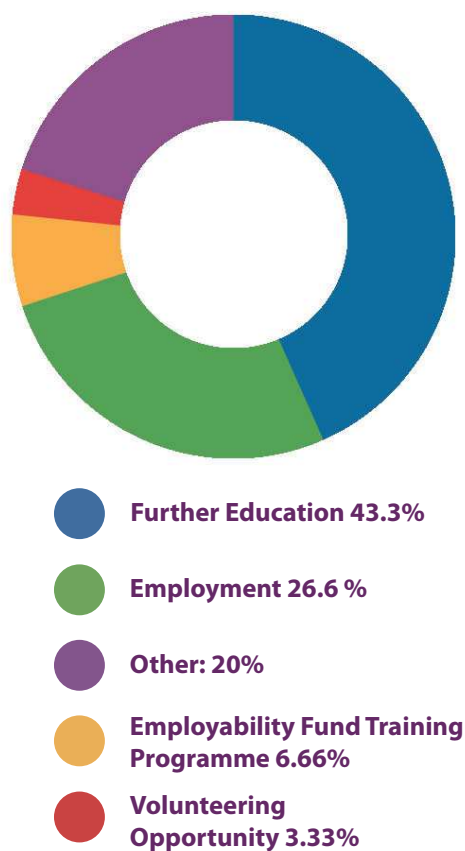
This project, which is part-funded by the European Social Fund, began in January 2017. The project aims to help people who have multiple barriers to work move towards and into work. The Council is the lead partner with two schemes being delivered by local organisations. The Social Enterprise Academy 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.

## Activity Agreements

Activity Agreements support young people (15-19) years who might not make a successful transition to work, further education or training without additional support. The Activity Agreement approach supports flexibility and choice in the development of Curriculum for Excellence senior phase learning and pathways.

In 2017/2018, 71 young people participated in an Activity Agreement and 80% of leavers progressed to learning, training or work opportunities and this is 1% higher than the national average. Main progression routes are as follows:





This year a high number of learners have taken part in creative arts activities and have achieved a range of accreditation, this includes Arts Award, Saltire Award and Duke of Edinburgh (units). The Activity Agreement group programme in January 2018 filmed and produced a short film to highlight their achievements and experiences on the programme.

### Employability Skills Pipeline

Within the new Skills Investment Plan (SIP) for Moray and the theme of Employer Skills Information an action area was included:

- To provide a central point for employers to obtain information and advice on all issues relating to skills/employment/training and support. This should be road tested as suitable for micro/SMEs to access

As a result of this, a working group are establishing a consortium to form a stronger partnership between skills and training providers across our employability pipeline. In addition to this, the working group are creating one central employability website which will act as a directory to other key employability themed websites. The new site will be called Moray Pathways (Learn. Train. Work).



Libraries are another valuable part of the employability provision in Moray. Libraries Learning Centres work in partnership with the Department of Work & Pensions (DWP) and Skills Development Scotland to deliver weekly job clubs across Moray and to support job seekers with their claims for Universal Credit.

Job Clubs run in Buckie, Elgin, Forres, Keith and Lossiemouth libraries and there were 1568 attendances at job clubs during 2017-18.

Libraries are also approved to offer ICT courses through Individual Training Accounts, funded by Skills Development Scotland, to build the skills needed for a job or to improve career prospects.

761 individuals attended ICT Digital Help Hubs offered through libraries during 2017-18. All libraries in Moray provide free public internet and wifi access and this service is used by Moray residents and visitors to the local area.

### Skills Development Scotland (SDS) Key Employability Data for Moray (June 2018)

SDS is the national skills body; Moray Council works in partnership with SDS to maximize employability. As agreed by Scottish Ministers, from 2017, the Annual Participation Measure has been adopted within the Scottish Government's National Performance Framework. It is replacing the school leaver destination follow up as the source of the indicator, "increase the proportion of young people in learning, training or work", published through Scotland Performs. Statistics and reports setting out Morays Skills resources and projected needs are available from the SDS website [www.skillsdevelopmentscotland.co.uk](http://www.skillsdevelopmentscotland.co.uk) Key SDS service data for Moray is summarised below:

- 1 In the last 12 months to the 30 September 2018 we supported 5 employers and 48 individuals dealing with redundancy
- 2 As of September 2018 there were 752 apprentices in training
- 3 From 1 April 2018 to 30 September 2018 we supported 241 Modern Apprenticeship starts
- 4 The Modern Apprenticeship achievement rate in Moray is 81%.
- 5 From 1 April 2018 to 30 September 2018 we delivered 3,830 Career Information. Advice and Guidance engagements for 2,035 people through a mix of group and one-to-one sessions.
- 6 From 1 April 2018 to 30 September 2018 871 people have registered on [myworldofwork.co.uk](http://myworldofwork.co.uk)
- 7 From 1 April 2018 to 30 September 2018 we funded 49 Employability Fund starts.
- 8 From 1 April 2018 to 30 September 2018 our Employer Engagement team has provided skills advice to 22 businesses.
- 9 The 2018 Annual Participation Measure showed that of the 3,832 16 - 19 year olds in Moray 91.2% were in education, employment or training and personal development.

## 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.

The Employment Land Audit 2018 found 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 will also identify a number of mixed use sites, recognizing the financial viability issues around employment land sites.

In Moray around 48% 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.

1.6 hectares of land was developed in the year to 1st January 2018, including the Maltings at Buckie, buildings at Coularbank Lossiemouth and a garage at Greshop, Forres. This is slightly higher than the previous years (1.23ha- 2017). At 1 January 2018 there was 2.31 hectares of land under construction.

Other notable employment land development outside designated employment land include new bonded warehouses at Glenfarclas, a craft gin distillery at Glenrinn estate, The Macallan distillery and an office and workshop at Drumbain Farm, Rothes, which collectively amount to over 20 hectares of activity.

## Procurement

Work has continued to embed the new duties contained within the Procurement Reform (Scotland) Act 2014 into the Council's procedures. This includes duties that will ensure that our procurement processes consider how the resultant contract can improve the economic, social and environmental wellbeing of Moray. A wide ranging set of considerations that will ensure resultant contracts go beyond commercial considerations.

Support has also been provided for the Supplier Development Focus Group (Economic Development, Business Gateway and Procurement) to deliver on a Strategy and 5 point action plan that will support local business growth, improve local investment, environmental wellbeing, encourage diversification and equality, and create opportunity.

We continue to hold supplier roadshows and surgeries for specific contract opportunities, supporting businesses through our processes particularly our use of [publiccontractscotland.gov.uk](https://publiccontractscotland.gov.uk) (PCS). As part of Moray Business Week 2017, an all day workshop was held "The Perfect Proposal - Winning Public Procurement Prizes in the Digital Age" 13 businesses attended. In January 2018, the Council published on PCS prior information notices regarding forthcoming contract opportunities with the Council in the construction sector. Briefings were held in Elgin and Mosstodloch; 160 people attended the events. Hosted by Housing and Property services along with Procurement team support Business Gateway also attended the engagements to signpost businesses to assistance. In 2017 and 2018, Business Gateway staff worked with BAM Nuttal to help highlight supply chain opportunities from the Aberdeen to Inverness railway line improvements.

The Council is an associate member of the Supplier Development Programme which provides support to suppliers seeking to win business from public sector procurement and is currently considering the benefits of full membership. The Payments Manager is currently on the SDP Board. A supply chain event was held in Inverness in September 2018.

## 6 Business Support



The Business Gateway service was transferred from Scottish Government Enterprise Agencies to Local Authorities in April 2009 and is managed in Moray through a Joint services agreement between Moray and Highland Councils.

During the year 2017/2018:

- **128** new enterprises started with support from Business Gateway Moray
- **186** jobs were created or retained as a result of SME's supported by BG starting up, growing or being purchased
- **27** start-up skills workshops were delivered to **326** attendees
- **30** workshops for growing businesses were delivered to **170** unique businesses
- **18** of which were Digital Boost workshops delivered with **106** businesses benefiting
- **47** businesses were supported with access to finance/Investor ready advice.
- **£1.56m** of funding secured by S/U and growing businesses from various lenders as a result of direct BG interventions and leveraged into the Moray economy.

Based on a 100% survey the 3 year survival rates of business start-ups assisted and still trading in 2017-18 in Moray was 86% well above the national average. [Business Gateway Moray reports](#) are posted quarterly on the Councils website.

BG facilitated Moray Business Week '17 Programme in conjunction with stakeholder partners. 560 unique businesses attended the week in total – up by 15% on MBW'17. Overall costs were reduced again this year and overall by 75% since the inaugural event in 2015 event.

**Local Growth Accelerator Programme** delivered the following support to growing business in Moray:

- Specialist business growth advice
- Investor Ready & Access to Finance support
- Recruitment Advisory Service
- Graduate Placement Programme
- Business Growth workshops
- Key Sector Entrepreneurial Support

A **Supplier Development** Strategy is in place to ensure a programme is developed so businesses in Moray are better able to access public sector contracts and supply chain opportunities as well as training on Public Contracts Scotland (PCS) and PCS tender – a Pilot programme was run in 2017/18 by BG Moray in conjunction with Public Contracts Scotland and approved by the Scottish Government.

Launched in February 2017 Business Gateway Moray is administering a new fund - **Business Loan Scotland** - giving small and medium sized enterprises (SME's) the opportunity to access loans between £25K and £100K to help them grow their businesses. A total of £185,000 had been awarded to Moray business at end March 2018

Funds were released in November for a loan to the Windswept Brewing Company and the Wooha Brewing Company. Case Study is shown on next page.

# Firm brews up plans to create visitor centre. Initiative for smaller businesses boosts Moray beer-makers.

BY REBECCA BUCHAN

**Two north breweries are forging ahead with expansion plans following successful awards from a government initiative to support businesses in Scotland.**

Windswept Brewing Co received £35,000 from Business Loans Scotland (BLS) towards plans to create a visitor centre and brewery tap at its Lossiemouth site along with more suitable office space.

This will allow Windswept to set up regular tours for the large number of tourists to the area, as well as put on special events for locals and tourists alike.



*Pictured here (L-R) Al Read, Director of Operations and Nigel Tiddy, Managing Director with a glass of beer.*

The long-term aim is to grow to capacity in the current location before building a new brewery that will enable production capacity to increase 10-fold.

Wooha Brewing Co also received £50,000 from BLS in addition to funding from both HSBC and Highlands and Islands Enterprise earlier this year.

The loan will be used towards kitting out and optimising its new larger production facility in Kinloss where the company moved a few months ago.

Founder and owner Heather McDonald said: "Our new site means we can increase production five-fold which means we are well on our way to achieving our ambition of becoming one of the UK's leading craft beer exporters."

"We believe that in 2018 80% of our business will be from exports, with the US being the main market." Andrew Dickson, fund manager from BLS, added: "Access to capital remains a major hurdle to many small and medium-sized businesses which are looking to start up and grow. Often, our funding can make the difference between a business struggling or flourishing and that in turn will have a positive impact on employment, profitability and making communities stronger."

"I am delighted the fund has been able to support both of these Moray brewing businesses."

John Cowe, chairman of Moray Economic Partnership, said: "This is fantastic news for Moray and another example of the spirit of entrepreneurship and business leadership we are seeing drive the local economy forward. Both Windswept Brewing Co and Wooha Brewery are valued local businesses providing employment and boosting the local economy in Moray."

"These loans follow the award of Business Loans Scotland funding earlier this year to Moray businesses, ProBond Marine and Makar and it is great to see local businesses expanding."

BLS loan fund recipient Wooha Brewing company also was recognised at the North East Scotland Food and Drink Awards 2018 winning the category for Best Young Business



*Pictured here (L-R) Mike Pocock, Group Sales Manager, Styropack (UK) Ltd – sponsor of the Best Young Business and Katy Heppell of Wooha Brewing Company*



## Elgin Business Improvement District (BID)



Elgin BID (Embrace Elgin) is a business support organisation, created following a successful ballot of the City Centre property owners and business operators. The BID works for and on behalf of them, collaborating to identify commercial and regeneration priorities and acting as a catalyst for action.

A small selection of the activities undertaken in 2017 – 2018 is included below. More detailed information can be found in the MID Term Review and the Annual Reports which are published on the [Embrace Elgin Website at www.embraceelgin.co.uk](http://www.embraceelgin.co.uk)

**Reduction in nesting seagulls** – Elgin BID worked with a specialised company to reduce the number of birds nesting in the city centre. Rising gull numbers has caused increasing concerns from business owners and members of the public. Infant birds often land on the ground and are unable to return to roof space, so their parents become aggressive swooping to protect them as people pass. Equally difficult, the adult birds have become bolder at attacking people eating lunch or snacks. The action taken saw a reduction in bird and baby numbers and will be continued in the future.

**Hanging Baskets** – In partnership with Elgin Community Council and the SPICE group, Elgin BID organised the reintroduction of hanging baskets in the city centre. This is the first stage of a larger project which aims to bring colour back to the centre.

**Regional Promotion** – Elgin BID contributed financially and with staff time for Moray Speyside to be represented at the Visit Scotland Tourism Expo. The aim was to promote not only Elgin, but the wider Region, engaging members of the travel trade from across the globe.

**Street Sweeper** – The mini street sweeper continues to run 3 mornings a week, adding to the Moray Councils cleaning regime.

**Christmas Lights** – Elgin BID organises and funds the Elgin Christmas Lights, supported by the Elgin Benevolent Trust. The last 3 years has seen the introduction of a bright, elegant scheme of new energy efficient lights.

**Vacant Property Reduction** – The number of vacant properties has continued to drop on the 12th October 2018 there were 8.7% vacant properties compared to 15.9% in May 2016. Proactive activity by BID, for example negotiating with agents to hold the keys of vacant properties has directly led to properties being filled in High Street, South Street and Batchen Street.

Elgin BID will return to Renewal Ballot in Autumn 2019, work is already underway to prepare for this and engagement has already started with the Business Members.

## Moray Towns Partnership

Community groups from Buckie, Forres, Keith and Lossiemouth have taken forward projects to improve the economy of the towns through this partnership which was funded by Moray Council until the end of 2017/18, with some towns having remaining funds available for expenditure in 18/19. Projects taken forward included: awarding 11 grants to local groups in Buckie via a participatory budgeting scheme called “Bucks 4 Buckie” for projects that would help improve the economy of Buckie; support for Findhorn Bay Arts to open a new shop/creative hub in Forres town centre; support for a “pop up shop” in Keith where businesses can have a Mid Street shop for a short period of time; support for the Lossiemouth Seafest event. The 4 towns also worked together, along with Elgin BID to promote Moray at the annual Visit Scotland Tourism Expo in April 2018– this was arranged and coordinated Moray Speyside Tourism. Further information about the projects and activities supported by the partnership is set out in the Moray Towns Partnership Report 2015-2018



Funding for the lighting was provided by Moray Council via the Moray Towns Partnership project.

## 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. Capacity and resources continue 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.

**tsiMORAY**'s training sessions and events have continued to be a real success with 219 individuals from 86 different organisations attending sessions from Jul 17 – March 18. The sessions included a Protecting Vulnerable Groups (PVG) session with Volunteer Scotland, an Introduction to Understanding Finance, Motivation in the Workplace, Volunteer Manager Training, Roles and Responsibilities of a Trustee and of course a session on GDPR with the Information Commissioners Office.

To celebrate the impact of social enterprise and the hard work of social entrepreneurs across Moray, in October 2017 **tsiMORAY** hosted their 'Impact Awards'. 27 organisations were nominated across 7 award categories.

In the 2017/18 round of Participatory Budgeting (PB) with **tsiMORAY**, 14 projects received a small grant of up to £3,000 through '#You Choose 2'. The total funding available for allocation was £30,000 which was made up of funding from 2 sources; Moray

Alcohol and Drug Partnership and Scottish Government's Innovations Fund (via Moray Mental Health & Wellbeing Partnership). #You Choose 2 saw **tsiMORAY**'s brand of PB go digital, introducing the D21 platform, to enable people to view PB projects and cast votes online for the first time in Moray. 695 people took part by voting in a very successful and positive project.

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.



### Moray LEADER Programme 2014-2020

LEADER is a bottom-up approach to delivering support to communities for rural development. . Moray TSi has been appointed by the Scottish Government as the lead body for the programme. The aim of the programme is to increase support to local rural community and business networks to build knowledge and skills, and encourage innovation and cooperation, in order to tackle local development objectives. This includes support for non-agricultural small businesses including farm diversification enterprises. Full details are available from their [website www.morayleader.org.uk](http://www.morayleader.org.uk)

2017/18 was a busy year for the Moray LEADER team at tsiMORAY. Established in Spring 2017 the team were able to award the first successful projects under the Programme in October 2017 amounting to an investment of more than half a million pounds. 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 members from across Moray. Working closely with the LAG and with an initial budget of £3.5 million the team have, to date, seen half of this funding agreed for allocation to a number of exciting projects across Moray including; an exciting new social enterprise hub, a major event highlighting the issue of poverty in Moray and renovation work on one of Elgin's top attractions.

### Community Asset Transfer

Community interest in taking over responsibility for public assets continues to grow. Ownership and control of land and buildings is a powerful tool for communities to drive 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 increasing financial austerity, community asset transfer provides an important means of ensuring the continuation and development of services. This was demonstrated clearly during the Council's 2018-19 budget consultation exercise, when the Council sought the views of the community on the closure of a number of town halls and community centres. Communities came forward quickly and, with the support of Council staff, arrangements were put in place to enable new community-controlled bodies to be formed to take over management responsibility for each facility. Short term leases to community bodies are now in place for Buckie's Fishermen's Hall, Cullen Community and Residential Centre, Dufftown Community Centre, Elgin Town Hall, Findochty Town Hall, Forres Town Hall (the Mechanics Institute), and Keith's Longmore Hall. Each group has been granted a short term lease while they prepare their proposals for a full transfer.

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. The Council is currently working with a wide range of community bodies in relation to their interests in taking over responsibility for 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.

### Tomintoul and Glenlivet Regeneration Plan

The Moray Council is a partner with the Cairngorms National Park Authority (CNPA) and Highlands and Islands Enterprise (HIE) funding support for the implementation of the Tomintoul and Glenlivet Regeneration Plan. The regeneration plan is making improvements to community infrastructure and supporting community capacity building for a sustainable future with aspects of the programme touching a number of the Council's priorities including supporting community empowerment. Between 2012 and 2017 Council funding has been used to provide support for projects including improvements to the youth hostel and for the employment of a Community Development Officer to support the Tomintoul & Glenlivet Development Trust that was established as part of the regeneration programme. The programme has been successful in engaging the community in the regeneration of the area through volunteering at the museum and youth hostel and a varied programme of events including a successful partnership with Chivas Brothers to host a Skerryvore gig at Glenlivet Distillery during the Spirit of Speyside Whisky Festival in 2017.

The Trust has published a four year community development plan following consultation with its communities on development priorities. This has identified additional infrastructure projects such as a touring caravan site and community housing required in the area.

The Programme will deliver 20 projects to celebrate and promote the rich heritage, improve the environment and develop skills and opportunities in Tomintoul and Glenlivet. This includes creating a new Discovery Centre at the former museum (opened in Easter 2018), improving access to heritage sites and the Speyside Way, conserving buildings at the former Scalan seminary and Blairfindy Castle, restoring rivers and burns to slow the flow of water, creating and managing wetlands for wading birds, creating education resources and training opportunities for young people, businesses and residents, and engaging local people in surveying and recording archaeological sites and sharing stories and photographs through a community history project; and creating a Dark Sky Park

### European Maritime & Fisheries Fund (EMFF)

A Highland and Moray Fisheries Local Action Group (FLAG) was established in 2016 for a new program with communities being encouraged to apply for a share of over £1 million of European Funding to support the sustainable development of fisheries areas. For full details please visit [www.hIGHLANDMORAYFLAG.CO.UK](http://www.hIGHLANDMORAYFLAG.CO.UK)

#### CASE STUDY NORTH 58 SEA ADVENTURES

North 58 Sea Adventures were successful in obtaining FLAG funding to run regular wildlife adventure experiences out of Lossiemouth harbour in a new custom built RIB. This funding also enables the organisation to develop increased coverage of ongoing research in the conservation of Moray Firth Bottlenose Dolphins.

**Total project cost £64,834**  
**FLAG funding - £12,156**

### Future European Funding

The Economic Development team provided the supporting work for two Strategic Intervention projects after securing European funding: an Employability project described earlier in this report and a project to address poverty and social inclusion:

### Poverty & Social Inclusion (part-European funded project)

This 2 year debt advice project began in February 2017 and is part funded by the European Social Fund. Clients, who are facing problems with debt, benefits and finance, are given one-to-one help and advice from experienced Council advisors. The funding criteria are that clients are to be from one of three household types: workless; lone parent; or low income. During the 2017/18 336 clients were advised. The clients gained in total more than £1 million in extra income as a result of the help received from this project (much of this income was from benefits which they are due and were helped to access).



## 8 Education and Social Cohesion

### Sustainable Education

Since the Sustainable Education Review was published, a number of significant developments have been undertaken in relation to providing sustainable models of education for young people in Moray. This has included the development of a policy on sustainability (known as “Schools for the Future”), leadership and management arrangements in primary schools and school admissions. In addition to this, significant work on school zoning has been undertaken in Elgin and Forres due to on-going capacity issues. By the end of the academic year 2017/18 five out of the eight Associated Schools Groups have been visited using the criteria in the policy to give recommendations regarding sustainability, consideration of further work to consider options as well as highlighting the strengths of the school and any areas for improvement. This supports school self-evaluation processes and identified priorities for continuous improvement. In session 2018/19 we will be taking a closer look at educational provision in the Speyside, Keith and Milne’s areas. In parallel to this a Strategy for a Future School Estate is being drafted and once all reviews completed, the current Schools for the Future policy will be reviewed as well as the structure and format of any future visits of the school estate.

It is anticipated that the new Lossiemouth High School build will begin in late 2018 and a new primary school, Linkwood Primary will begin early in 2019. Education Staff work closely with the planning team to consider any further new builds in line with house building across Moray. We constantly review our estate and seek out opportunities for funding etc., but in light of the financial constraints faced by the Council, in 2016 the previous policy of bringing all schools up to an acceptable standard in terms of both condition and suitability was ended and instead a policy of “make do and mend” is now being pursued for our capital assets including schools. With anticipated increases in school rolls, Caledonian Economics have been commissioned to look at the

rationale and calculation of projected school rolls as well as efficiencies to be gained from timetabling arrangements across the Elgin Secondary schools in the first instance.

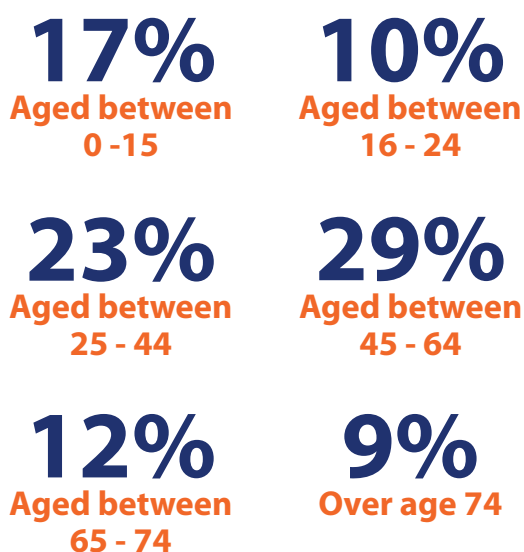
### Reducing Inequalities

The Local Outcomes Improvement Plan (LOIP) referred to at page 2 has been developed by community planning partners and was approved by the Community Planning Board, Spring 2018. This will focus on addressing inequalities of outcome across the Moray area through a range of interventions.

### Population and Age Demographics

The 2017 mid-year estimate for the population of Moray was 95,780 with our residents being comparatively well dispersed across the area. Between 2007 and 2017 the mid-year estimates for the population of Moray increased by 4.75% while Scotland as a whole increased by 4.93%. The relative population increase in Moray was the 14th largest of all 32 local authorities. For Moray, the natural change in the population over the 2007 to 2018 period due to births and deaths was very small (-0.31%) with most change due to net migration’s influence on the population which was more significant (5.06%).

In terms of age demographic, of Moray’s population:



The growth in the number of older people compared to economically active younger people is recognised as a major challenge for Scotland, and in Moray the proportion of the population that is 65 and over is growing faster than Scotland as a whole. The 2017 mid-year estimates compared to the 2011 census results for people aged 65 and over are 3.73% higher for Moray against 2.3% higher for Scotland. Life expectancy in Moray is above the national average for both males (78.7 years in Moray against 77.1 years for Scotland) and females (82.1 years in Moray against 81.1 years for Scotland) and in general a longer period is spent in better health.

Moray has about the same proportion of under-16 year-olds as the Scottish average, but the proportion of 16 to 44 year-olds in Moray is 3.4% less than the national average (33.3% in Moray against 36.7% for Scotland). Many young people move away for education and work. There is a challenge to keep young people here or to attract them by providing more education and employment opportunities. Age demographics have been used in a number of research activities during the period to inform strategic planning. For instance the Local Outcome Improvement Plan (LOIP) uses evidence at locality level from all over Moray. Addressing this imbalance in our age demographic and working to reduce the gender pay gap are two key objectives of Moray Growth Deal.

## Community Safety

The Community Safety Partnership continued its work to ensure Moray remains a safe place to live and do business and comprises of partners from Council Services, Police Scotland, Scottish Fire and Rescue Service, NHS Grampian, Housing Associations and the Third Sector.

The Community Safety Hub operates a multi-agency tasking and co-ordinating process to tackle relevant issues across Moray by identifying and addressing immediate concerns in order to protect the most vulnerable and at risk and be proactive to ensure that communities feel safe. They do this through the use of intelligence and evidence analysis to provide areas for early intervention and prevention.

This close working relationship between Partners facilitates the early identification of issues allowing a proportionate multi-agency response to be put in place. These issues may range from criminal and antisocial matters at one end of the scale to ensuring people live safely within their home at the other. This also includes an improved focus on online safety and scam prevention to protect those most at risk from these unscrupulous acts.

Early intervention can often prevent the escalation of the issues and prevent community impacts resulting from the adverse behavior of a few.



## COMMUNITY SAFETY PARTNERSHIP MORAY

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## 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 currently undertaking studies to identify 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.

### CASE STUDY REGENERATION - CARS

Since 2019 Conservation Area Regeneration Schemes (CARS) have been developed for Keith and Elgin in close partnership working with the local community to provide physical improvements to priority buildings, grants for repairs & shop-front improvements, raise awareness and skills through seminars, training & apprenticeships.

The Elgin Conservation Area Regeneration Scheme, (CARS) was launched on 13 August 2013 and was completed by March 2018. The scheme was overseen by a Management Group which includes Elgin Bid, Elgin Fund, Elgin Benevolent Trust, Moray College UHI, local Councillors and specialist advisors.

The scheme provided improvements in key buildings, shop fronts, public realm and apprenticeship opportunities.

The project enabled the investment of £2,560,797 together with an additional £1,200,000 of owners investment as a direct result of Elgin CARS representing a value of funds invested into the Elgin Conservation area of £3,760,797. In total, 53 buildings had work that was grant aided and 665sqm of commercial floor space and 1,445sqm of residential floor space was brought back into use. Work was carried out on public realm, priority buildings and shopfront improvements at 35 High Street; Clancy's building- 165,167,169 High Street; 7 South Street; Muckle Cross and Victoria Cottages.





Before



After

A training programme was a joint initiative with the Keith CARS where Elgin CARS contributed 50% or the cost. The aim of the programme was to run courses of specific topics for contractors, craftspeople, architects, planners and other professionals working in the field of conservation.



Before



After

In total, there were 158 separate attendances at the 12 courses made up of 117 individuals, hence 74% or people who attended a course chose to return and attend a least one other. In addition, evening talks and drop-in sessions for local homeowners were held.

## Economic & Social Outputs

The Elgin CARS has been funded by Historic Environment Scotland £750,000, Moray Council £740,488, Elgin BID £125,000 and Elgin Fund £40,000 with owners / private contribution of £2,105,309 at a total investment of £3,760,797. The expenditure is set out in the table below.

Details	CARS	Owners/Private	Totals
Priority Projects	£188,161	£164,827	£352,988
Shopfront Repairs	£54,248	£14,679	£68,927
Building Health Check	£417,953	£223,215	£641,168
General Fabric Repairs	£548,006	£361,652	£909,658
Public Realm	£105,205	£51,444	£156,649
Training And Events	£81,280	£89,492	£170,772
Apprentices	£103,146	-	£103,146
Administration and CARS Officer	£157,489	-	£157,489
<b>Sub -Totals</b>	<b>£1,655,488</b>	<b>£905,309</b>	<b>£2,560,797</b>
Additional Public Investment (Estimate)		£1,200,000	£1,200,000
<b>Total Investment</b>	<b>£1,655,488</b>	<b>£2,105,309</b>	<b>£3,760,797</b>

Key indicators for the properties receiving CARS funding is as follows:

Approximate numbers of new jobs created	3
Existing economic activity safeguarded	34
New Businesses	24
Floor space back into use - commercial	665sqm
Floor space back into use - residential	1,445sqm
Category A listed buildings grant funded	2
Category B Listed buildings grant funded	11
Category C Listed buildings grant funded	3
Historic shopfronts grant funded	4

There has been a marked decrease in the number of empty shop units in the Conservation Area. Total Vacant Units (where former use was comparison, convenience, retail service, or leisure service)

2018	2016	2014	2012	2010
25	36	39	25	15

This shows a significant improvement over the last 2 years, and brings it back to occupancy level in 2012. A noticeable difference is particularly evident on Batchen Street and Commerce Street.

## Heritage Experience

Elgin's heritage has been interpreted for a twenty-first century audience using a variety of new and creative methods and mediums. The information available is multi-levelled so it appeals to all ages and interests. This includes the following activities set out below as a result of robust systems which are in place to monitor data, evaluate and analyse on an ongoing basis the impact the project has made in delivering the aims & objectives. The table below provides the key figures up to February 2018

<b>Creations &amp; installations</b>	
Website - <a href="http://www.elginheritage.scot">www.elginheritage.scot</a> . (excluding temporary site)	<b>18,305 hits</b>
Interactive Orientation Point, St Giles Shopping Centre	<b>6,502 users</b>
All abilities - Access path to Ladyhill Castle Scheduled Ancient Monument with counters	<b>30,797 visitors</b>
Interpretation panels of various sizes	<b>32</b>
Way-markers with QR code	<b>17</b>
Heritage images at Grant Lodge	<b>41</b>
New heritage maps at car park entry points & at Ladyhill	<b>7</b>
Bespoke Heritage wall mural map in St. Giles Shopping Centre	<b>1</b>
Sculptures	<b>3</b>
New directional signs	<b>31</b>
Lighting of heritage features - Wolf & Elgin Drummer sculptures and the Tower building	<b>3 locations</b>
Bespoke metal bench on top of Ladyhill site with inscription based on a visit by Robert Burns to Elgin	<b>1</b>
Outdoor projectors with seasonal light show at St. Giles Church	<b>1</b>
Film on the creation of the Drummer sculpture	<b>1</b>
Audio recordings with sound effects	<b>6</b>
3D high definition scans project with range of talks	<b>1</b>
<b>Events &amp; activities</b> – exhibitions, talks, tours, outreach, competitions & special events	<b>35</b>
Participants including young people	<b>22,679 Visitors</b>
Volunteers	<b>191</b>
Volunteer Sessions	<b>320</b>
Volunteers hours	<b>2176</b>
<b>Promotion &amp; Marketing</b>	
Gateway large signs at the entry roads from the West and East into Elgin	<b>2</b>
Explore Elgin's History' leaflets	<b>5000</b>
Video clip of Sword, Fire & Stone at Re-enactment Event Scotland	<b>24,000 hits</b>
Sword, Fire & Stone temporary Castle to Cathedral to Cashmere website	<b>26,000 hits</b>

The Heritage Experience has been funded by Heritage Lottery Fund £78,000, Moray Council £123,345, Elgin CARS £106,854, Elgin BID £70,000, Highland & Island Enterprise £32,000 and Elgin Fund £12,000 at a total of £422,199. The expenditure is set out in the table below.

Details	Description	Total
Digital outputs	Web design & mobile technology, 3D laser scanning	£62,954
Professional fees	Copy Writing & Interpretative Design	£32,597
Other	Activities budget (Events budget, Materials, etc.)	£26,895
Equipment and materials	3D interactive model, Interpretation, Lighting, Signage, Sculpture, bench, map boards	£271,029
New build works	Ladyhill Castle site path	£28,724
<b>Total</b>		<b>£422,199</b>

### Elgin Town Centre Regeneration

A Public Design Charrette carried out with the Scottish Government in 2014 set out objectives that Elgin should have a “city centre for living with a wide choice of residential and visitor accommodation”. An Action Plan to address this includes projects for “City Centre Living: More Choice Residential & Visitor Accommodation”, and “Target Vacant & Underused Space & Difficult Sites: Ground and Upper Floors”.

A key conclusion of the Central Elgin Regeneration: Public Design Charrette is that in reflecting the realities of the current property market, the delivery of priority projects will typically involve a number of sectors, funders and funding sources and will need to have resources focussed on their delivery. An Elgin Action Plan with 12 Priority Projects covering a range of initiatives was agreed by the Economic, Development & Infrastructure Committee. The following outlines progress on these during 2017-18

#### 1. Regeneration & Re-use of Buildings/Assets

Opportunities continued to be pursued with - Developers, Agents, Property Owners, Housing Agencies, Builders and Business Owners 53 properties improved as a result of Elgin CARS

#### 2. Lighting Feasibility Study & Plan

Some lighting was taken forward through the Castle Cathedral Cashmere project and there may be elements of lighting considered as part of the cultural quarter project but this will not address further improvements in the high street area.

#### 3. Elgin Town Hall - Review use of outdoor civic space & street furniture and improve connections from the Town Hall to Lossie Green Car Park

Improvements will be sought as part of Moray Growth Deal bid Cultural Quarter proposal working with the local community group that has begun the process of a Community Asset Transfer.

#### 4. Vacant Retail Unit Audit

The 2018 vacancy audit confirms that the percentage of vacant premises has reduced from 14.3% in 2016 to 10.0% in 2018. Stimulated by grant funding from Elgin CARS, units along Batchen Street have been refurbished by a mixture of landlords and tenants, with traders promoting retailing here under the “Buzzing Batchen” banner. South Street is becoming known as “Wedding Street” with like businesses establishing it as the go to place for wedding attire and planning. See also Elgin CARS case study.

#### 5. Wi-Fi Elgin City Centre

The company Focus with support from Castle Cathedral Cashmere, Moray Council, Elgin BID and Scotland’s Town Partnership is developing free Wi-Fi for the Castle Cathedral Cashmere corridor.

## **6. Bus Station Review – review existing provision and produce improvement plan.**

Further to consultation in 2017-18 with the Government, it has been confirmed this would not likely be something it would support in a future Regeneration Capital fund application. Alternative funding sources would need to be identified. Revitalisation of the bus station is part of Elgin Transport Strategy.

## **7. Car Parking Review & Action Plan**

A parking strategy was prepared and agreed by the Economic Development and Infrastructure Services Committee in October 2017. The first phase of the strategy was prepared for implementation, including changes to car park charges.

## **8. Trial of High Street Access - Bus/Taxi/ Disabled/Coach Access – drop & pick up point for tourists**

As part of Elgin Parking Strategy we have agreed an additional coach stop on the west side of the town centre. The concept of vehicles accessing the plainstones was discounted for road safety reasons.

## **9. Signage Audit & Action Plan**

No change in 2017/18. Audit of Town Centre complete, further work on main routes into the Town Centre to be carried out when staffing resources allow.

## **10. Streetscape Review**

It may be possible to seek improvements to the following areas as part of the Moray Growth Deal bid – Cultural Quarter proposal

- Lossie Wynd
- A96 crossings
- College Street to Cathedral
- North Street

Design solutions to be developed and costed. Crossing the A96 has been considered and included in Elgin Transport Strategy.

## **11. Outdoor Event Space - Fixings and electricity point upgrades, large screen projector**

Events and Activity spaces remain within future plans by the Elgin BID.

As part of the Castle to Cathedral to Cashmere project, a projector was installed at the refurbished Merkatt Cross and provides light shows from October to March. The fountain was refurbished in 2017-18 and lighting installed.

## **12. Cooper Park Masterplan**

Potential to include in the Moray Growth Deal bid as part of Cultural Quarter proposal; funding sources such as European Green Infrastructure Fund are also being explored.

## **Waste Management**

At the start of June 2018, the collection of household residual waste was reduced from fortnightly to 3 weekly. As well as saving £100,000 per year in annual operating costs, the potential for landfill tax savings and increased recycling rates with three-weekly collections are significant.

Monitoring of waste presented at the kerbside indicated that significant amounts of recyclable waste were being deposited in the residual green bin. Long term data will be required to provide auditable success but we are now receiving a dramatic increase in volumes of recyclable material especially that of plastic bottles and cans. Reports from crews also indicate a dramatic increase in the number of recycling bins presented for emptying. Moray Council continues to be amongst the top performing recycling local authorities in Scotland.

Progress with the proposed joint Energy from Waste Facility with Aberdeenshire and Aberdeen City Councils has been satisfactory and is scheduled for completion in September 2021.

The upgrading and extension of the waste management facility at Moycroft Industrial Estate, Elgin has made good progress with the contract due to commence early in January 2019. The facility will be closed during the construction period and will re-open in February 2020 well ahead of the need for additional capacity for handling additional waste to be transferred to the new Energy from Waste Plant from 2021.

## **Energy and Climate Change**

Energy performance is an increasingly important factor in assessing the overall performance of property assets and in operational and investment decision making.

Noteworthy projects undertaken during 17-18, which incorporated energy performance improvements, included lighting replacement schemes, time control for the hot water provision and Building Energy Management Systems (BEMS) improvements.

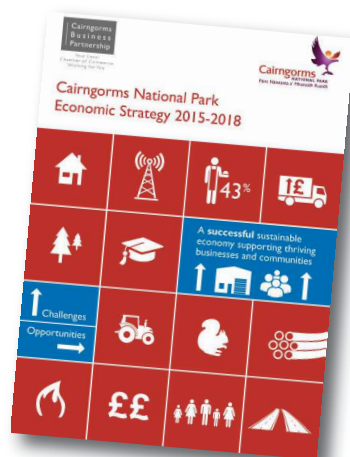
A five year programme to upgrade existing street lighting to LED technology began in 2015 and continued throughout 17-18, to date consumption has reduced by 18%.

## 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 refreshed Cairngorms Economic Strategy has been developed focusing on enhancing existing themes and will closely align with the Scottish Government Economic strategy. The strategy will be approved in late 2018 and will run from 2019-22. This will ensure that it will align with the National Park Partnership Plan 2017/2022 which was approved by Scottish Ministers last year.

Work has continued on the new Local Development Plan 2020. The initial consultation on the Main Issues Report ended in March. Over 300 responses were submitted and a summary of all comments was published in June. A small number of new site proposals were submitted in response to the Main Issues Report, and these were subject to a focused consultation during August and September. A draft version of the new Local Development Plan (the Proposed Plan) will be reported to the CNPA's Board for approval in December and will then be published for public comment in early 2019. Thereafter, it will be submitted for independent Examination before being formally adopted in 2020.



The Cairngorms Economic Strategy (2015-18) was launched in Oct 2015 with the aim of growing the economy of the park by strengthening existing business sectors, supporting business start-ups, and increasing the number of workers employed in the Park. In 2018 CNPA have been leading a review of the Economic Strategy working closely with the five Local Authorities present in the

National Park, the Enterprise Agencies, Cairngorms Business Partnership, which is the local chamber of commerce, and the wider business community.



# 10 Tourism and Culture

## Tourism and Culture Strategies

### Moray Cultural Strategy 2014-2017

Published in February 2015, the vision of the strategy is that Moray is recognised as a creative place with the following objectives:

- Recognise the positive impact of creativity for everyone.
- Encourage new ways to encounter creativity in the everyday.
- Empower communities to establish sustainable cultural activities.
- Develop tools to connect and communicate about cultural activity.
- Grow quality cultural activities, festivals and events.
- Make effective use of our built environment and natural heritage.
- Ensure access to creative learning for all who seek it.
- Help creative businesses to start, grow and develop.

The strategy identifies a number of opportunities relating to these objectives and is used to guide the Tourism and Culture Programme Group of the Moray Economic Partnership.

Libraries work in partnership with Visit Scotland to provide tourist information across Moray as well as staffing the tourist information point in Elgin Library. Libraries also work with local accommodation providers to support visitors to the area to find accommodation during their stay. 2932 tourists made enquiries through Elgin Library during 2017-18; 1260 of these came from outwith the United Kingdom.

### Moray Place Partnership

During 2017 £200,000 funding was received from Creative Scotland for a three year plan for developing cultural activities in Moray matched in cash and kind by public and private organisations. Lead partner for the Place Partnership is Highlands and Islands Enterprise, supported by a stakeholder group from public and private sectors.

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.

Since the project co-ordinator was appointed in October 2017, the following activities have taken place:

- The 3-year Action Plan agreed by Creative Scotland has been reviewed to further identify priorities and create a Work Plan for the Co-ordinator.
- The Co-ordinator is actively engaged with a range of arts organisations to gain further understanding of what the sector needs to become sustainable.
- Plans are being developed for a study visit to learn from a more progressed Place Partnership area.
- Branding activity to raise the profile of the partnership as 'We Make Moray'.
- Financial award of £15,000 to Findhorn Bay Arts Ltd to match fund and lever in £100,000 from Cashback for Creativity to delivery 'In the Mix'. In the Mix is a bespoke, professionally-led 3-year project of creative activity for Moray's 10 - 25 years, who are experiencing isolation and/or who are out of work/school, and/or who are at risk of offending, and/or live in rural pockets of deprivation. Led by professional, qualified creative practitioners, these young people will be supported through a series of workshops, one-to-ones, creative visits and a Creative Holiday Programme. As a result of engagement, participants will gain invaluable cultural, life and transferable skills; their confidence and communication skills will have significantly increased and their risk of offending will have reduced. This combined will bring them closer to employment and/or training and/or volunteering. Where appropriate, the young people will be supported to achieve recognised accreditation/qualifications, and all will be brought closer to the job market and/or routes to further education.

- A tender brief is being developed to undertake the following:
- Assess whether the Moray Cultural Strategy continues to be fit for purpose
- Recommend priorities for a coherent next steps cultural strategy
- Provide a baseline for future measurement of priorities
- Identify opportunities for place based innovation and co-design of services to improve community wellbeing.
- Digital Sub-Group formed and survey carried out to determine digital priorities for the sector.
- Place Partnership hosted a briefing session for artists in Moray about VACMA, ensuring they were aware of the fund, how to apply, what made a good application and the benefits the fund could bring demonstrated by a presentation from a Moray artist and past recipient (Caroline Inkle).
- Moray Artists Bursary launched on 10 July 2018 to support local artists. £15,000 in total is available as small grants to support individuals working across the arts, screen and creative industries in Moray. Emerging and established artists are encouraged to apply for a bursary of between £500 and £1500 before midnight Sunday 19 August to help towards activities such as researching, creating and presenting new work or advancing skills, technical ability and ideas.
- A Culture Café Event is being organised to raise awareness of the new Draft Scottish Government Cultural Strategy and encourage responses to the consultation process.
- An Arts and Business Networking Event will take place at Glasgow School of Art Campus on 8 November 2018.

## 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

Tourism in Moray Speyside is booming, with the impact of Moray Speyside Tourism's activities being felt across the region and by businesses big and small. In the time that Moray Speyside Tourism has been operating, the value of tourism to Moray has grown by more than £22m and the number of visitors enjoying our beautiful region has risen by more than 200,000.

Full year figures for 2017 indicate that the economic impact of tourism to the Moray economy rose from £117.64M to £128.88M – an increase of 9.6%, or around £30,000 extra spending each day of the year.

- Total visitors to Moray Speyside grew to 806,190 – an increase of 7.4%
- Visitor days have risen from 1,799,430 to 1,874,470 – an increase of 4.2%
- The number of Full Time Equivalent (FTE) employed in the region's tourism industry has grown to 2,846, an increase of 2.8%

## Moray Speyside - STEAM Tourism Economic Impacts Report 2017

2017 was a year of firsts for Moray Speyside as a destination. It was the first year our region was represented at overseas travel events, the first year that an overseas travel trade delegation visited the region, the first time that VisitScotland's Growth Fund had been used for business to business activities, and the first time the region was nominated as Destination of the Year in a prestigious national award, the only Scottish destination to reach the shortlist.

MST again led representation Moray Speyside at VisitScotland Expo with 8 commercial partners representing some of the region's most popular visitor attractions. The MST aisle was consistently the busiest for the duration of the event. Feedback from industry partners has been uniformly positive and commercial partners are all indicating high expectation of securing new business.

MST actively advocates and lobby for the region's tourism industry, seeking to increase awareness of our region with key stakeholders and partners, to protect and preserve our distinct identity and to ensure that we are included in both regional and national conversations.

## Future Priorities

Moray Speyside's tourism industry is performing better than ever before. To ensure that this success continues into the future, a sustainable model for tourism development must be identified for the region. To this end, Moray Speyside Tourism is leading a project to establish a Tourism Business Improvement District (TBID) for the entire Moray Speyside which could significantly increase Moray Speyside Tourism's capacity, allowing the DMO not just to continue its work, but to significantly increase revenue and tourism employment in the area.

A campaign of engagement with tourism businesses is underway and a ballot of businesses is expected in August 2019.

## Moray Speyside Visitor Economy 2017

*This is a summary of the tourism trends research undertaken for MST by Global Tourism Solutions (UK) Ltd.*



## Museum Service

The Falconer Museum is an accredited, five star museum. Direct visitor figures increased from last year at just over 6212 (April – October inclusive) with



a total of 32,322 indirect users via enquiries, events and outreach and 43,701 via Facebook, website and online enquiries. 'The UK Year of Indian Culture' was a fantastic opportunity to celebrate the cultural links between Forres and India by showcasing a variety of items from the Museums' large Indian collections. During May, for the National, 'Festival of

Museums', Museum staff organised a hugely successful 'Holi' celebration in Grant Park which included authentic Indian drumming, dance, song, music and food. Complimentary creative family workshops and storytelling sessions were held in the museum and the school holiday family drop-in sessions included Indian themed crafts. This was supported by grant funding from Museums Galleries Scotland.

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

The overall spend from the filming industry in Scotland has amount to £95.6 million, which by the end of December 2017 has been a record year.

Over the years there has been a significant increase in the popularity of film tourism in Scotland, which has seen a vast increase in visitor numbers coming to Scotland as a result of successful films such as Harry Potter, Shetland etc.

As partners of the Creative Scotland Film Locations Network, which has 14 regional offices Scotland wide, we offer a free and confidential advice service to the film and television industry regarding locations, permissions, facilities such as road closures, provide local knowledge on land and property owners to enable film companies to reach a successful outcome for their shoot.



During 2017/18, we have had access to just over 1000 enquiries relating to film, documentaries, TV commercials and music video, which has included a company from Barcelona filming for a Spanish series as well a number of Japanese companies looking for a variety of locations. Craigellachie Bridge in particular has been a very popular location.

### Moray Events

Moray has seen some unique events attracting visitors both locally, nationally and internationally which include the Gordon Castle Highland Games and Country Fair; Findhorn Bay Arts Festival brought a spectacular programme of arts and culture events and the Spirit of Speyside Whisky Festival and Distilled showcasing some of the world's best whisky distillers united under one roof. Piping at Forres seen its 5th event, in June 2018 which will be the last year it is hoped that this event will return in the future, so watch this space....



*Piping Hot at Forres*

### Event Liaison

The Economic Development team in consultation with other Council departments, Police, Fire and Ambulance Services work with organisers to facilitate successful events. A good process of communication has been established to regularly consult with other departments, agencies and event organisers to work through their event plans providing a wide range of advice and expertise such as licensing, road closure to environmental health etc., to ensure that events are both safe and enjoyable for visitors attending.

### Moray Doors Open Day September 23, 2017

Supported by the Scottish Civic Trust, 21 historic buildings were open to the public with 1,911 people attending which was almost double the previous year's attendance. Thanks must go to the 127 volunteers who helped on the day.



*Doors Open Day at Nelson's Tower, Forres*



*Doors Open Day at Findhorn Heritage Centre*

### Markets and Town Centre Events

The Moray Council is keen to support markets and other non-commercial events and recognises these as an important part of community life. A booking diary and framework is in place to allow events activities and markets to be booked throughout the year, which ensures that users have the necessary permissions in place in Elgin, Forres, Keith, Buckie and Lossiemouth. In the year ending March 2018, there were a total of 50 events, including 14 markets. In addition, Elgin BID has organised feature events such as the Food & Drink Festival and the annual Christmas Light Switch-on with the aim of increasing footfall.

### Moray Fundraising Seminar

This annual event usually held in October has become very popular over the years providing on average over 130 organisations and individuals with an excellent opportunity to find out about funding for Moray. Delegates can engage with guest speakers and key funders who deliver the latest best practice, gain insights on current funding programmes and is also a perfect platform for networking with like-minded people. This year's event was supported by Business Gateway; it had great representation from national, regional and local funders including Big Lottery and the Heritage Lottery Fund who commit their time to travel to Moray making it an annual event in their calendar.

# 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 2015/16	Scotland 2015/16	Moray 2016/17	Scotland 2016/17	Moray 2017/18	Scotland 2017/18	Moray %change (2017 to 18)	Scotland %change (2017 to 18)
<b>Number of Building Warrant Applications</b>	986	41,419	882	37,556	928	40,213	-10.55%	-9.33%
<b>Number of Planning Applications</b>	718	28,803	596	26,990	654	26,220	-16.99%	-6.29%
<b>Private Housing rental (2 bed av mean monthly rents)</b>	£561	£616	£575	£643	£583	£652	1.4%	1.4%
<b>Average House Price</b>	£151,569	£166,543	£154,241	£166,734	£160,229	£175,229	1.76%	0.12%
<b>House Sales</b>	1,748	99,391	1,749	99,972	1,705	102,357	0.06%	0.58%
<b>Number of Enterprises</b>	3,190	171,900	3,195	174,625	3,195	174,229	0.16%	0.06%
<b>Population</b>	95,510	5,373,000	96,070	5,404,700	95,780	5,424,800	0.59%	0.59%
<b>Gross Weekly Pay by workplace (all full time workers)</b>	£488.10	£534.50	£498.10	£547.30	3549.80	£563.20	9.5%	3%
<b>Gross Weekly Pay by residence (all full time workers)</b>	£496.30	£536.00	£497.90	£547.70	£527.20	£562.70	5.2%	2.8%
<b>% workforce in private sector</b>	77.7%	73.4%	81.3%	74.1%	78.80%	74.70%	-3.08%	0.81%
<b>New businesses were supported to start-up with one-to-one advice</b>	128	9,087	132	10,629	128	9,129	-3.03%	-14.11%
<b>Job Seekers Allowance Claimants /March</b>	914	62,887	849	51,893	817	45,633	-3.77%	-12.06%