



MORAY ECONOMIC DEVELOPMENT  
**ANNUAL REVIEW**  
2016/17



**moray**  
council

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# 1 Introduction

I'm delighted to introduce you to the third Economic Development Annual Review, the intention behind this being to provide a comprehensive overview of major economic development activity driven or closely supported by various services across the Council during the financial year. As with previous reports, although the focus is largely on activity within the financial year, information on the way in which key developments then progressed over the remainder of 2017 and beyond is also provided where this is helpful.

Without a doubt, the standout development for me during 2016/17 was the inception of Moray Growth Deal. This was also the year in which our neighbouring authorities were successful in achieving City Region Deals to promote a step change in economic growth for Aberdeen and Inverness and Highland. By late 2015/ early 2016 it became apparent that similar funding would also be made available to areas outwith cities and that time was very much of the essence if Moray was to craft a deal which not only met our own needs but, where possible, built upon the projects being developed in neighbouring deals, so avoiding the displacement which might otherwise be experienced given our location. The growth deal workshop process started in September 2016 and by August 2017 we had the first version of our deal vision, objectives and success measures as well as a good indication of the projects which we believed would deliver that vision. Public and business engagement to date has been positive and work continues to refine our bid and reach an initial agreement known as Heads of Terms.

Another major development was the announcement in 2016/17 that RAF Lossiemouth was to become the home for nine new P8 Maritime Patrol Aircraft as well as an additional Typhoon squadron, with a £400 million MOD investment in the base. In the same year, following fears that Kinloss Barracks would be closed as part of the MOD Footprint Review, it was confirmed not only that the base would be retained but also that it was recognised as having capacity to host additional personnel.



**Rhona Gunn**  
*Corporate Director*  
(Economic Development,  
Planning and Infrastructure)

Whilst economic diversification and reduced reliance on the MOD have been key objectives of Moray Economic Strategy since it was framed in 2012, the sheer scale of these developments and the economic opportunities which they will create for the area have been universally welcomed by our communities.

The theme of expansion was continued with completion of award winning masterplanning for residential developments to the north and south of Elgin, with an indicative housing capacity of in excess of 4500 new homes to be built over the next 25-30 years.

Also in 2016/17, Moray Employability Partnership was formed and the Employability Strategy was finalised. These drew together planning and developments previously fragmented across the community planning partnership, creating a coherent and ambitious set of objectives for skills development and employability in Moray.

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.

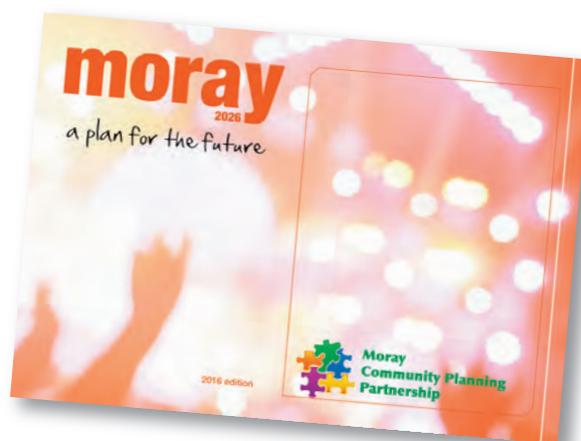
A handwritten signature in black ink, appearing to be 'Rhona Gunn'.

## 2 The Strategic Context

### **Moray 2026 and the Local Outcomes Improvement Plan**

“Moray 2023 – a Plan for the Future” was first framed by the Moray Community Planning Partnership in 2013 following the gathering of extensive evidence on key issues across Moray and consultation with local communities on aspirations for the following 10 years. The culmination of that work was agreement of 5 overarching priorities shared by all community planning partners. Of those 5 priorities, sustainable economic development was recognised as the most important as a vibrant economy plays a pivotal role in not only funding many services but also contributing to our mental wellbeing and training and educational opportunities. Moray 2023 was revised periodically and the last version of that community plan was Moray 2026 in which economic development remained the top priority.

In order to measure progress in growing a diverse and sustainable economy, a range of targets were identified, and for this particular priority, nine targets were agreed ranging from the rate of population growth to wage rates, business start-ups and the percentage of the workforce in the private sector. References to relevant Moray 2026 targets are included at relevant points throughout this report.



Moray 2026 is set to be replaced with Moray 2027 in late 2017. Moray 2027 will be the latest generation of community plan also known as a Local Outcome Improvement Plan (LOIP).

Guidance from the Scottish Government on Community Planning replaces the Single Outcome Agreement approach at the root of Moray 2026 with a plan based on improving local outcomes. The aim of the LOIP will provide a focus for partners on prevention, reduction of inequalities and building community capacity.

### **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. A refresh of the strategy is in progress 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 Bid. Following consultation and approval, the refreshed strategy will be published in 2018.

## 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 which were drawn from the Moray Economic Strategy. Operationally supported by the partnership programme groups whose activity is routinely monitored at MEP, during 2016-17 the partnership advanced various initiatives and projects including but not limited to:

- Began the process of developing a Moray Growth Deal Bid;
- Considered the implications of the vote for Brexit;
- Considered a comprehensive economic data set published for Moray;
- Monitored the economic targets included in Moray 2026;
- Discussed the Community Planning Partnership Public Outreach held in 2016
- Co-ordinated media services to promote the work of the partnership & Moray as a place to live, work & visit;
- Supported Scottish Apprentice Week;
- Maintained a dialogue and support for the MOD on operational plans and development that benefit the economy;
- Considered the Cairngorms National Park Plan;
- Engaged with the Moray Developing the Young Workforce Initiative
- Considered the Moray Employability Strategy;
- Provided support for the preparation of a Moray Skills Investment Plan (published October 2017);
- Considered the implications of the Apprentice Levy;
- Received the 2015-16 Annual Report of Moray Speyside Tourism; and
- Supported the 3rd Annual Moray Business Week.

Additional information is provided in the programme quarterly updates published by the partnership, posted on the MEP page of the [Your Moray Community Planning Partnership website](#). The partnership has provided guidance and support for many of the projects contained within this report.



## Moray Council Corporate Plan

The Council's Corporate Plan was framed in 2015 to cover a 3 year period. As well as setting out the corporate vision and values, the Corporate Plan also identified what the Council as a single agency would be doing over the period from 2015-2017 to contribute towards the wider Moray 2026 plan priorities. In terms of the Council's top priority of sustainable economic development, a range of actions are set out extending from major developments which will have an impact throughout the area such as developing Buckie harbour as an operations and maintenance base for the offshore renewables industry through to more localised initiatives such as the Tomintoul and Glenlivet Regeneration Project. Each action listed in the Corporate Plan is addressed in this review.

Given the change of administration following the Local Government elections in May 2017, the Corporate Plan is now being refreshed and the next Corporate Plan for 2018-2023 will be presented for approval in February 2018.

## 3 Inward Investment and Development

In June 2016 we welcomed the news of the decision to station 9 P8 Maritime Patrol Aircraft at RAF Lossiemouth helping to counter uncertainty regarding the future MOD presence at Kinloss Barracks. Happily, in late 2016 that uncertainty was ended with confirmation that Kinloss Barracks will remain operational for the foreseeable future. The developments at RAF Lossiemouth which are valued at in excess of £400 million are likely to bring over 400 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:

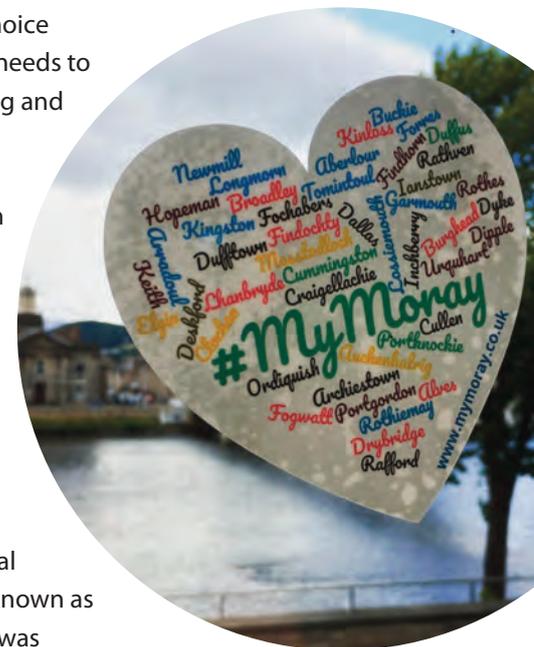
By 2030, Moray will be known as:

- 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 Spring and 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 – has been strong with an approval rating from a public survey of 83% and growing endorsements showing support from local businesses.

Partners have been developing strategic outline business cases for a number of projects that will form the basis of discussion with governments for an initial agreement known as Heads of Terms provisionally targeted for the summer of 2018, although the need for clarity on the timeline for growth deals has been recognised by the Holyrood Local Government and Communities Committee.



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 been ongoing to develop the next local development plan for the period from 2020 onwards and over the last year work has focused on development of an evidence base for the plan and preparation of the Main Issues Report (including draft policies). The Main Issues Report considers the key land use planning issues in Moray, considers the changes that need to be made to the current plan and presents options for consultation. In addition to ensuring there is sufficient housing and employment land a strong emphasis is being placed on how the plan can support the creation of better places. Embedding placemaking in policy will help deliver more attractive, active, integrated and healthier places. The Main Issues Report will also explore how the plan can protect the environment and address climate change. Working with NHS Grampian, Scottish Water, Education, and Transportation the plan will help to establish and co-ordinate infrastructure requirements associated with proposed development. The main issues look to explore how the plan can more closely align to the priorities of the Community Planning Partners.

The Main Issues Report will be subject to extensive consultation and engagement over the 12 weeks at the start of 2018. Exhibitions will make better use of new technology with touch screens, interactive mapping and short videos used to convey the main issues and encourage discussion. Officers are also working with schools to try and attract a younger audience. The responses to the consultation will be reviewed and used to help develop the Proposed Plan.



In the Moray Local Development Plan 2015 significant areas of growth are identified at Bilbohall, Elgin South, and Findrassie in Elgin; and in Forres at Dallas Dhu and Lochyhill. The Main Issues Report is also looking to support significant expansion to the south west of Buckie. Better co-ordination and facilitation of these sites is required to support delivery, achieve better quality places and maximise economic growth. Establishment of Delivery Groups that work in partnership with developers not only to facilitate and co-ordinate the masterplan and planning application process but to continue to support and monitor delivery until site completion.

### Woodland and Forestry Strategy

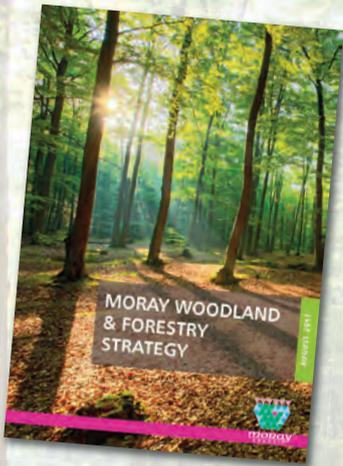
A Woodland and Forestry Strategy for Moray has been prepared. The strategy is framed around a 20 year vision of growth for our forests and woodlands. Moray's diverse and distinctive forest and woodland resource offers significant potential to attract investment and support employment. Annually within 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. There is a need for further discussion with Forestry Commission Scotland regarding future investment that can help support these types of proposals. £16,000 of funding has been secured towards the implementation of a first phase of health walks at Roseisle and Culbin.

There are specialist architects throughout the region who have developed considerable skill in utilising 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.

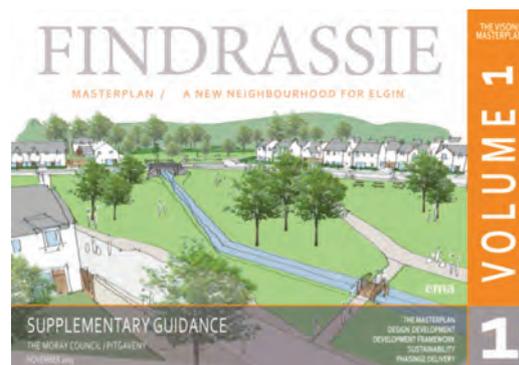


### ii) Development Management - Planning and Building Control

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, working with Planning & Development who prepare the Moray Development Plan & Strategies and Building Standards who issue Building Warrants. All services work collaboratively to deliver major projects both public and private in an efficient, streamlined manner which provides certainty for the developer and also achieves the Council's sustainable economic development priority

Having an up to date Moray Local Plan with associated Supplementary Guidance is essential to dealing with development proposals effectively. All major development proposals and proposals which have significant economic impact are now covered by a processing agreement between the Council and the Developer setting out key milestones over the life of the project (from the pre-application stage through to the signing of a Section 75 legal agreement and discharging planning conditions prior to work commencing on site). Significant work has been carried out on master planning such as that seen for Elgin South and Findrassie and highlights the importance of working with developers and providing pre-application advice to improve the quality of design in final submissions as well as front loading the planning application process. A framework has recently been approved for Barmuckity Business Park to assist with its delivery on the ground.



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

The Planning Performance Framework (PPF) is another major contributor to service improvement. This is prepared and submitted annually to the Scottish Government and details how Planning & Development Services are contributing to the



Council's sustainable economic development priority, this year has seen further improvement in scoring for the year 16/17 demonstrating constant improvement and we anticipate that further improvements in the current financial year will be reflected in the next PPF submission.

Application numbers have reduced slightly due to permitted development rights being extended and performance has continued to improve with the average time for local applications at 6.8 weeks and householder applications also at 5.7. Major development average determination timescales are also down to 16.9 weeks. 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.





Planning permission and listed building consent were granted for a new mixed use creative learning/art space and office development utilizing a Category A listed historic steading approx. 2 miles outside Forres on the Altyre Estate. Alterations were carefully considered and designed to minimise impact on the historic structures. The external appearance, historic interest and health of the buildings ultimately benefit from the proposed works.

Development centred on the restoration and part demolition of agricultural buildings to form mixed use commercial development. Large scale repair of historic fabric ensured that original windows, doors, roof, stonework and harling were retained where possible.

Re-configuration and rationalisation of internal spaces to modernise buildings for use included adding new window and door openings, glazed screens infilling existing openings, new conservation type roof windows and new downpipes for areas lacking provision.

Extensive collaboration with the estate owner and architects throughout the planning process, in the form of pre-application advice and guidance on design aspects of the proposal from Moray Council and Historic Environment Scotland, has ensured that a successful and innovative end use for a large historic steading complex has been found.

Blairs Home Farm Steading on the Altyre Estate near Forres has been transformed into a world-class research and teaching space. This is an unparalleled opportunity for students to study within a newly renovated campus in spectacular surroundings. The buildings have been converted into a Glasgow School of Art (GSA) campus, providing inspiring studio, workshop and exhibition space as well as state of the art areas for research, teaching, prototyping and flexible lab work.

The GSA is internationally recognised as one of Europe's leading university-level institutions for the visual and creative disciplines. The campus brings the GSA's world-leading research and teaching to the Highlands and is one of the top 10 art schools in the world (QS World Subject Rankings 2015).

The development demonstrates that collaborative working can produce well considered high quality development within the historic environment and that this partnership approach can be successfully replicated on other projects.





211A-211F High Street Elgin is a redevelopment of 6 townhouses that have been vacant for over 10 years. The properties are Category B & C listed and form a diminishing range of gabled buildings. The site is located within the outstanding conservation area, as identified in the Moray Local Development Plan 2015, and contributes to the medieval herringbone layout that characterises it.

Planning permission and listed building consent were approved for the redevelopment works which has ensured that 6 properties on the Buildings at Risk Register can now be removed from the list. The proposed works conserve and invest in a historic built environment resource whose future was in doubt and jeopardised by continued lack of use and therefore maintenance.

The development involved minimal changes to the exterior façade of the buildings fronting onto the lane. Existing windows were retained where possible and any replacements made to match the existing in terms of detailing. New conservation velux windows and slate vents were introduced to comply with current building standards and a lean-to at the end of the terrace was removed and replaced with a new bin store with timber linings. Internally, alterations were limited to decoration; stripping and replacing plasterboard, new insulation measures, kitchens and bathrooms. 2 properties were extended into roof space to create more living accommodation.

Working in collaboration with the developer to identify a viable use and regeneration strategy for the 6 vacant properties complies with aims of a recent conservation area appraisal of Elgin High Street that identified a lack of residential uses within the conservation area. Ensuring occupancy has wider benefits, in that buildings in use tend to be better looked after and maintained.

Prior to the application being made, Moray Council Planning Section, Economic Regeneration (CARS) and Building Standards had detailed discussions with Robertsons Properties to establish the scope of works proposed and how this would ensure that the special architectural interest and character of the listed buildings and wider conservation area was preserved. The Council and Robertsons worked together throughout the planning process to create a redevelopment scheme that would create inviting places for people to live while still retaining the original character of the properties and established street pattern.

From start to finish the process of identifying the vacant buildings, obtaining grant funding from the Scottish Government and CARS scheme to completion and occupation of the buildings took less than a year (July 2016 - February 2017).

The development demonstrates that collaborative working can produce well considered high quality development within the historic environment and that this partnership approach can be successfully replicated on other projects.



### **i) Local Housing Strategy**

During 2016/17, the Council's new build programme delivered 16 house completions with a further 47 under construction at year end. The Council also purchased land for 135 houses. The completions contributed Moray to the 2026 target of 50 council houses to be built per year for the following 10 years. During 2016/17, following a review of the Housing Business Plan, the Council agreed to increase the new build supply target to 70 houses per annum over the next 3 years.

The total amount spent on new Council housing in the financial year 2016/17 was £5.036m. This included £3.734m of Scottish Government grant funding. During the year, housing associations used a further £3.807m of grant funding to deliver affordable housing in Moray, achieving 30 completions and 72 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 investment in 291 new Council houses during the period 2017-22.

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

The Council prepares an annual housing land audit and is required by Scottish Planning Policy 2014 to maintain a 5 year supply of effective land (free from constraints) and to ensure there is a generous supply identified in the Moray Local Development Plan (MLDP). The 2017 Audit shows that the Council has maintained a 5 year effective supply. The 2017 Housing Land Audit shows an effective housing land supply of 4094 units, which equates to a 7.6 year effective housing land supply. The total housing land supply 2017 (effective and constrained land) is 13,141 units, of which 5,945 units are identified as longer term housing land reserve, which can be brought forward as and when required.

House completions in 2016 were 334, compared with 337 in 2015, 309 in 2014, 315 in 2013, 342 in 2012, 418 in 2011 and 431 in 2010. 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 2010-2016 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. The ability to deliver on development identified in the MLDP is an area proposed for strengthening in the current Planning Bill.



## 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 and the Council bought a large site at March Road, Buckie in January 2017 where it is currently constructing roads and services to provide a supply of development sites in East Moray for business seeking to build their own bespoke premises. Phase 1 is expected to complete in February 2018.

The Council is also in discussions with Highlands and Islands Enterprise with a view to providing small serviced development sites at the Enterprise Park, Forres.

In addition, 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, the administrative capital of Moray. However a developer (with support from Highlands and Islands Enterprise £1.9m of grant aid) is now on site constructing roads and services at Barmuckity, to the East of Elgin - this is expected to provide around 30 hectares of serviced land for industrial and commercial uses. There are a number of active enquiries and planning applications from businesses seeking to locate here.

### iii) HIE/ Enterprise Park Forres

HIE continues to work to develop the Enterprise Park Forres, where companies including Makar Technologies, Kura and Atos continue to grow. Following Glasgow School of Art's relocation to the new Altyre Campus, work continues to seek new tenants and return Horizon Scotland to full occupancy. Over the coming 12 months HIE will also work to find occupants for Unit 9 which is currently vacant.

As part of the work on the Moray Growth Deal bid, HIE will identify opportunities to build further the existing cluster of technology and advanced engineering companies located on the Enterprise Park.

During 2016-17 in addition to ongoing work done with Account Managed companies and work with fragile communities HIE has been instrumental in facilitating the development of Elgin Business Park at Barmuckity and facilitated the Glasgow School of Arts move to Altyre Campus.



#### 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 2016, and therefore an updated health check will be completed in 2018.

The 2016 health checks highlighted that vacancy levels in Elgin, Keith, Buckie, and Rothes were lower than 2014, while vacancy levels in Forres, and Dufftown increased. Vacancies in Edgar Road, Lossiemouth, Aberlour and Fochabers remained the same.



During 2016-17 the following projects have helped to support vibrant town centres.

- Markets and non-commercial events are supported in Elgin, Forres, Buckie, Keith, and Lossiemouth.
- The Keith Pop-Up Shop, established through the Keith CARS. In 2016-17 the cost of administration of bookings for the shop and utility bills for the shop were met by funding from the Moray Towns Partnership.
- Elgin BID works to improve the local trading environment. See further information on page 24.
- The Elgin Conservation Area Regeneration Scheme has provided grants for building repairs and shop front improvement and facilitated improvements to the public realm projects. See further information on page 31.
- 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 38.

A summary of the 2016 findings are set out in the table below.

Town	Comparison		Convenience		Retail Service		Leisure Service		Vacancy		Vacancy Rate %		% of National Multiples	
	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014
Elgin	86	86	18	18	47	45	65	67	36	39	14.29	15.3	34	34
Edgar Road	20	19	2	2	2	3	3	2	5	5	15.63	16	75	79
Forres	29	32	13	15	21	20	25	23	9	8	9.28	8.16	20.63	21
Keith	27	28	13	13	12	9	18	19	5	6	6.67	8	9.6	12
Buckie	28	27	7	7	15	15	21	19	8	11	10.13	13.92	28	30
Lossiemouth	10	12	6	6	9	10	18	16	8	8	15.69	16	8	7.6
Aberlour	7	8	5	4	4	4	9	9	0	0	0	0		
Dufftown	10	10	6	7	4	5	18	20	4	1	9.52	2.3		
Fochabers	7	8	4	3	3	3	9	9	1	1	4.17	4.2		
Rothes	7	5	3	4	2	2	9	9	2	3	8.7	13		

## 4 Transport and Infrastructure

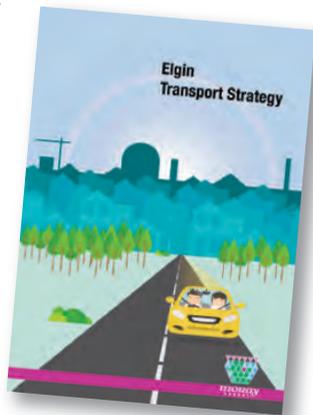


### A96 Dualling

The Scottish Government has a commitment to dual the A96 between Inverness and Aberdeen by 2030. The scheme is being promoted by Transport Scotland as Trunk Road Authority. Moray Council considers the promotion of the A96 corridor vital to the economic development of Moray and this is a target in Moray 2026. Transport Scotland has divided the work into separate sections, with the most relevant package to Moray being the work to dual between Hardmuir and Fochabers. In June 2016 Transport Scotland awarded a contract to Mott MacDonald Sweco Joint Venture to carry out route options assessment and detailed design work. Initial route corridors were published in the summer of 2017 and were subject to public consultation. The preferred route option is anticipated to be identified in summer 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. In August 2017, following extensive public engagement, the Council approved Elgin Transport Strategy which sets out a range of interventions on the network. The summary document can be found on [moray.gov.uk/transportstrategy](http://moray.gov.uk/transportstrategy).



### Buckie Harbour

The Council sold part of the Buckie shipyard to Macduffs Shipyard Ltd in May 2017 with the shipyard expected to be open again for business in 2018 following a refit of the yard.

The Council is currently in dialogue with Beatrice Offshore Windfarm Ltd (BOWL) to secure Buckie Harbour as a contingency port for the BOWL wind farm. Following the government announcement in October 2017 to award a Contract for Difference Contract to Moray Offshore Windfarm (East) Ltd the Council has also been involved in discussions with the developer and supply chain companies providing options to support operations and maintenance within the harbour area for this field.

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 2016/17 as follows:

- **Moray Walking Festival**- the 5th midsummer festival used many of the Core Paths as walking event locations. The Festival is focussed on raising the profile of 'The Moray Way' (around 80miles 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. Preliminary investigation to establish community demand for upgrading the railway path between Rothes and Craigellachie to a 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.

[Information about walking and cycling in Moray](#) is on the Council's website

## Active Travel

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

Through the grant funding of Community Links Programme 2016/17 Moray Council constructed an Active Travel Route to Elgin High School. This provided a direct and traffic free route to encourage a modal shift to active travel journeys replacing the existing core path route with a high quality path which was previously narrow and constrictive. The new 1 km path links the residential areas of south west Elgin to the new Elgin High School, the core path network in the countryside, Elgin Golf Course, Greenwards Primary School and also the existing active travel network in town. Promotion of this scheme included flyers handed out to all pupils at Elgin High and Greenwards Primary, uploading of the flyer to our Urban Freedom website and press releases as well construction updates tweeted on social media.



*Active travel route*

Moray Council further secured grant funding through the Smarter Choices Smarter Places programme for an active travel behaviour change programme based on street art work to take place in Elgin. The scheme provided street based activities, community engagement and worked with local schools to deliver a programme of art installations and associated activities allowing people to discover new walking and cycling routes.

### **Broadband and Mobile Phone Infrastructure (connectivity and speeds)**

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

Including commercial coverage (i.e. BTs own coverage) the percentage of premises in Moray with access to Next Generation Broadband (NGB) was 89% as of July 2017 and is anticipated to be at 93% by the end of 2017.

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

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.

The final 7% of premises without access to NGB will be the hardest to serve and require technical solutions to be developed over time to reach.

The SNP election manifesto for the Scottish Parliament included a pledge to reach 100% by the end of the current Parliament (2021) but full details on how this will be achieved in Moray are not yet available.

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 will continue 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.



*New Forres railway station*

## Timber Transport

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



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

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

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

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

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

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

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.

In Moray the Employability Moray Partnership, reports to the Community Planning Board, to provide a coherent and strategic platform for all employability services within the Moray area.

Employability Moray's vision is to provide a coherent framework which supports people into positive and sustained destinations. There are four sub groups which report to Employability Moray, these being;

- 1 Developing the Young Workforce (DYW) Moray
- 2 DYW Moray Board
- 2 Skills Investment Plan Group
- 3 Lifelong Learning Forum

Moray 2026 refers to ambitious and confident young people, and economic development and both will be central in relation to improving employability in Moray. Moray Council's ambition is to embed employability skills within the curriculum to better prepare and inform their students of the world of work.

### Developing the Young Workforce (DYW) Partnership

DYW aims to help employers to engage and connect with schools and young people in Moray and the Moray regional group is led by the Moray Chamber of Commerce. The group of DYW partners have looked at all the recommendations with in the national Developing the Young Workforce report and collectively mapped an action plan under 5 key headings:

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

Discussion between other partners is taking place to ensure there is no duplication with the Children Services Plan and Morays National Improvement Framework. Significant progress has been made in developing apprenticeship opportunities and creating stronger links with industry.





## Moray Skills Framework & Pathway

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

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

Ultimately 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 to develop the skills, knowledge and attitudes required for the workplace thus supporting employers and Moray's economy.

### Aims

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

\* *9 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 and Employers allows for a joined up approach to ensure the correct pathway is available to all young people.



### **Career Management Skills (CMS)**

Budget was secured for 2016/17 to second a member of staff, from Skills Development Scotland, to embed career management skills in curriculum practice. The close working between the two organisations has ensured that CMS is embedded throughout the Moray Skills Pathway.

### **Work Related Learning (Work Experience)**

Throughout 2016/17 extensive work has been undertaken to review the work related learning pathways in Moray as a result of Education Scotland's Thematic Review, 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 throughout the next year in line with the DYW partnership group action plan.

### **Employability (part-European funded project)**

European Social Fund money was secured for an employability project which aims to move out-of-work people with barriers towards and into work. This project is being co-ordinated by Moray Council and delivered by partners. The first project started towards the end of the financial year – whereby the Social Enterprise Academy is training 12 out-of-work people at a location in Forres. Funding is in place for other projects which will start in the coming financial year. The overall aim of the project is to help 111 out-of-work people move into work.

### **Activity Agreements**

Activity Agreements improve the support and recognition of young people learning in a community learning and development or a third sector setting. 2016/2017 has been a very successful year for the delivery of the Activity Agreement learning programme in Moray. A high number of the 15-19 year olds in Moray who have completed their Activity Agreement have moved onto further learning, work and training.

The Scottish Government have also expanded the aims of the Activity Agreements, to include the identification of learners pre-16 (up to 6 months in advance of leaving school). They have included the provision of aftercare support for young people who might be at risk of not sustaining their positive outcomes. See below headline statistics for 2016/17:

#### **HEADLINE STATISTICS FOR 2016/17**

##### **Overall Progression Rate**

Moray	<b>83%</b>
National Average	<b>77%</b>
Number of referrals:	<b>86</b>
Number participated in Activity Agreements:	<b>61</b>

##### **Referral Characteristics: can be multiple)**

Additional Support Needs:	<b>39%</b>
Care Experienced	<b>24%</b>
Young Offenders	<b>8%</b>
Mental Health Issues	<b>36%</b>
Attendance issues at school	<b>54%</b>

##### **Main Progression Route:**

Further Education	<b>58%</b>
Employment	<b>13%</b>
Community Job Scotland	<b>3.2%</b>
Employability Fund	<b>3.2%</b>
Training Programme	
Volunteering Opportunity	<b>6.4%</b>
Not participating in learning, work or training	<b>16.2%</b>

## 2017 Annual Participation Measure Report Summary for Moray Council

The third release of statistics on the participation of 16-19 year olds at a national and local authority level is the second year the annual participation measure reporting methodology has been used. The annual participation measure takes account of all statuses for individuals over the whole year (1st April 2016 – 31st March 2017) as opposed to focusing on an individual’s status on a single day. For each of the individuals included within the annual measure grouping, the headline participation category (participating, not participating and unconfirmed) is based on the headline classification with the highest number of days.

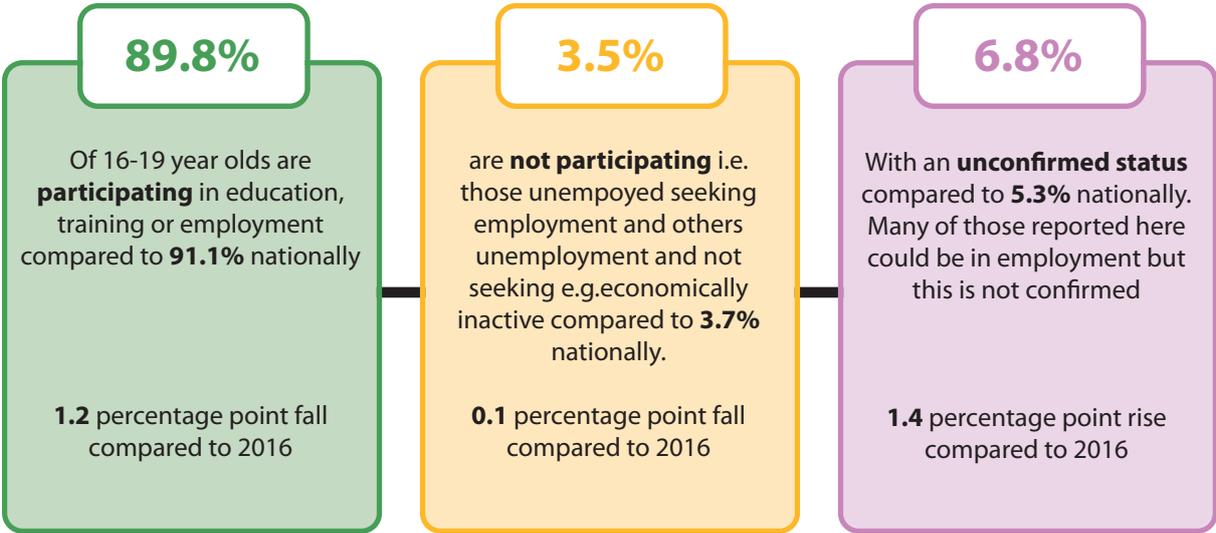
As agreed by Scottish Ministers, from 2017, the Annual Participation Measure will be adopted within the Scottish Government’s National Performance Framework. It is replacing the school leaver destination follow up as the source of the indicator, **“increase the proportion of young people in learning, training or work”**, published through Scotland Performs. The full annual participation measure 2017 report and accompanying supplementary tables are available in the participation measure statistics page of the [Skills Development Scotland website](#). A summary is shown below:

## YEAP (Youth Employability Action Plan)

YEAPs focus on partnership delivery and referral arrangements locally of activity to support young people. Given the changes that occur to activities as funding and other factors impact, a YEAP is a *working document/local directory* for ongoing review by partners.

YEAPs make a significant contribution to Community Planning Partnership planning arrangements on skills and employability activities with each Local Employability Partnership. The YEAP sets out the key activities delivered within each stage of the local skills and employability pipeline. The directory of services supports the learners journey from initial referral and engagement through to employer engagement. There are currently 5 providers delivering training provision from stage 3-5 on the pipeline. The organisations are Lifeskills, Barnardos, Moray Training, Workingrite and Moray College.

The YEAP for Moray is available via the Moray Council website and will be integrated into a new local employability website in the future.



## **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. Whilst employment land supply is not a statistical indicator within Moray 2026 land supply is key to achieving the desired outcomes including providing quality accommodation, increasing business start-ups, attracting inward investment, and growing employment opportunities in areas of key strength or emerging opportunities.

The Council monitors the supply of employment land through an annual audit. The Employment Land Audit 2017 found that there was a decrease in the overall supply of employment land due to construction activity, identification of land for alternative uses and removal of sites that no longer have planning consent. There has been a decrease of 18.79ha in the effective land supply (land that could be brought forward within 5 years). This decrease is due to a better understanding of site constraints, mainly where landowners are unwilling to sell and/or are seeking alternative higher value uses.

The audit found there is a limited choice of sites within settlements, often only one or two realistic options. Whilst developments in 2017/18 at Barmuckity, March Road in Buckie and growing interest in private sector provision have helped, across Moray there is an issue getting land serviced highlighted by a shortage of serviced land for immediate development. The supply of general industrial land in Forres is severely constrained and there is shortage of land in the Speyside area.

The Main Issues Report explores options to support the delivery of employment land, as well as looking to establish land supply requirements to ensure an effective supply is designated in the next Local Development Plan. This includes considering a mixed use approach on parks of industrial sites allowing some higher value uses to support viability and deliver site servicing.

The Main Issues Report considers potential new designations for employment uses, with large new designations being considered at Waterford Forres, Burnside of Burnie Elgin and on land to the west of Mosstodloch.

## **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 the 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 [pubiccontractscotland.gov.uk](http://pubiccontractscotland.gov.uk). In addition to these contract specific workshops, an event aimed to promote the opportunities for construction related companies in Moray was held in February 2017. The event promoted the requirements for a number of major projects underway in the area - RAF Lossiemouth and Railway development as well as highlighting the Council's own procurement activity plan.

The Council is an associate member of the Supplier Development Programme which provides support to suppliers seeking to win business from public sector procurement. The Payments Manager is currently on the SDP Board.

## 6 Business Support



Business Gateway was introduced to Moray in April 2009 and is managed through a Joint services agreement between Moray and Highland Councils.

During the year 2016/2017:

- **132** new enterprises started as a direct result of BG Moray interventions
- **236** jobs were created or retained by SME's supported by BG to start up, grow or as a result of purchase
- **30** start-up skills workshops were delivered to **260** businesses
- **30** workshops for growing businesses were delivered with **303** unique businesses attending **18** of which were Digital Boost workshops delivered in partnership with HIE with **200** businesses benefiting
- **64** businesses were supported with access to finance/Investor ready advice. Direct BG interventions resulted in these companies securing **£2.28m** of leveraged funding from various lenders + 30% matched funds of £700K. This totalled **£2.98m** of finance levered into the Moray economy by SME's

Based on a 100% survey the 3 year survival rates of business start-ups assisted and still trading in 2016-17 in Moray was 84% well above the national average. [Business Gateway Moray reports](#) are posted quarterly on the Councils website.

**Start-up survival rates** - Source BG National - (Moray / National Comparison)

	Moray	National	Moray	National
Volume Start up survival Rates April 2016 – March 2017	12 Months	12 Months	36 Months	36 Months
	<b>87%</b>	<b>81%</b>	<b>84%</b>	<b>68%</b>

In November 2016, Business Gateway facilitated the third annual Moray Business Week attracting over 400 growing businesses to a series of events & workshops.

Business Gateway Moray launched a **Local Growth Accelerator Programme** on 6 February 2017 which will run until end of 2018 and includes 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 is being 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. Funds were released in Jun 2017 for a loan to Probond Marine. Case Study is shown on next page.

4 NEWS MORAY

THE PRESS AND JOURNAL  
Wednesday, September 6, 2017

## Boat builder on crest of wave after funding boost

### SCHEME

BY DAVID MACKAY

A Buckie boat builder has become the first company in Moray to benefit from a new loan scheme designed to help businesses expand.

ProBond Marine Ltd want to market their newest inflatable model on the international stage.

And now, after being rejected by other organisations, the company has been able to borrow £50,000 from Business Loans Scotland.

ProBond Marine has been working with Carson

Rigid Inflatable Boats on manufacturing a mould for the crafts, which would be the first of its kind in the world.

Founder Colin MacAndrew left the oil industry nearly two years ago and launched the company from his parents' garage. The firm secured premises in Buckie in September.

Mr MacAndrew said: "Ultimately, without the funding, we would have been in a sticky position.

"We tried several other organisations for financial assistance, but were unsuccessful. This has allowed us

to continue with our exciting plans."

Business Loans Scotland is a partnership of Scotland's 32 councils and can provide funding of up to £100,000 for small and medium-sized businesses.

The success of Moray firms has already prompted the local authority to ask for its quota of £230,000 to be increased if other areas fail to spend their allocation. Andrew Dickson, fund manager for Business Loans Scotland, said: "Often, our funding can make the difference between a business struggling or flourishing."



SEA CHANGE: ProBond Marine is looking to market its newest inflatable model internationally

## 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.

The BID also acts as a conduit between the business community and the Local Authority, ensuring that priorities are highlighted and shared and supporting joint activity to address these.

Following a successful renewal ballot in 2014, Phase 2 of BID came into being in February 2015 this will continue until January 2020.

2016 – 2017 activities have included;

- WorldHost Regional Destination Status - Elgin BID chaired the Management group to successfully achieving Regional Destination status, one of only 4 Regional Destinations in Scotland. The formal announcement of Destination Status will be made in early 2018.
- New Home Packs – have been introduced and are now being distributed to new home owners/occupiers at Kinloss Barracks, RAF Lossiemouth, Robertson and Springfield homes. Packs give links to the Elgin Business map, the Food & Drink Guide (which underwent a revamp in 2017) and the What's On Calendar.
- Visit Scotland Tourist Expo – Support was given both financial and in staffing resource to the Moray Delegation attending the 2017 Expo – promoting Moray as a Region of choice for visitors.
- Castle to Cathedral to Cashmere & Conservation Area Regeneration Scheme – Financial and operational support given to both these projects
- Vacant Property Reduction – Elgin BID worked with landlords and agents to negotiate holding keys, so that interested people could view properties at a time that was convenient – this directly led to properties being leased.

- Business workshops – BID organised several Employer Workshops including Auto Enrolment, GDPR Awareness and Anti-Terrorism Training for events organisers across Moray.
- The street sweeper continues to operate 3 days a week, supplementing TMC's statutory obligations.

The Mid Term Review providing more information can be found at <http://www.embraceelgin.co.uk/wp-content/uploads/2017/11/Mid-Term-Review-Final-for-web-site.pdf>

## 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. Projects taken forward included: ongoing support of the Buckie public wifi system; support for a social enterprise in Forres which helps people with barriers to gain work experience (Roy's Opportunities); support for a "pop-up shop" in Keith where businesses can have a Mid Street shop for a short period of time; lights to illuminate the exterior of Covesea Lighthouse by Lossiemouth to attract visitors. The 4 towns also worked together, along with Elgin Business Improvement District to promote Moray at the annual Visit Scotland Tourism Expo in April 2017– this was done in collaboration with Moray Speyside Tourism. Funding for the projects came from Moray Council. Further information about the projects and activities supported by the partnership is set out in the [Moray Towns Partnership Report 2015-2018](#).



## 7 Social Economy

The social economy of Moray continues to thrive, develop and grow through the delivery of activities, goods and services by community groups, voluntary organisations and social enterprises. There is an increased recognition by public sector and the wider community of the current and potential contribution that the third sector can make to the design and delivery of public services. Corporate Social Responsibility Initiatives and community benefit clauses within the private and public sector have raised the profile and added to the value of the social economy.

Moray Council, through its Community Support Unit, and **tsiMORAY** continue to support the development of an enterprising third sector, ready and willing to grasp the opportunities presented by the Community Empowerment (Scotland) Act 2015. The Act has opened the door for a range of new community and social enterprises through the extension of right to buy and the introduction of new regulations around Community Asset Transfers and participation requests, extending the potential for communities to provide services to meet their own needs and aspirations.

During 2016/2017 **tsiMORAY** continued to play a leading role in developing third sector capacity through providing leadership, training opportunities and support for third sector organisations to secure funding and other resources.



Some key initiatives and achievements taking place during 2016/17 included:

- **tsiMORAY** placed 358 volunteers across Moray with another 268 young people registering with Saltire, contributing to the local economy, the employability agenda, and the development of Moray's social capital. Volunteers' week in June 2016 had a really positive 'feel good' factor, with a volunteer marketplace set up in the local church hall in the centre of Elgin. This was held following requests by the local volunteer managers and attracted over 30 organisations showcasing their work and volunteering opportunities.
- Moray Social Enterprise Network currently involves 63 organisations; the focus for 2016/2017 was on strengthening local connections and providing local support. This was facilitated by the organisation and delivery of peer learning visits, including New Start Highland, Covesea Community Lighthouse, Elgin Youth Development Group and Morayvia, providing opportunities for inspiration, learning, networking and building confidence



- 26 individual training sessions were delivered through the tsiMORAY training programme, with 271 individuals attending. Participants came from 91 different organisations or groups evidencing the breadth of the programme to meet the needs of many but also the desire of groups and individuals to learn and develop
- The Money for Moray Group distributed £160,000 to third sector organisations through Participatory Budgeting; £120,000 of this was for community-led economic development projects
- The Health & Wellbeing Team of tsiMORAY distributed just over £115,000 to 80 local projects through Participatory Budgeting and Small Grants
- Uniquely in Scotland the Moray LEADER programme is being delivered by a third sector organisation. With a total budget of £3.5M for the period 2014 – 2020 LEADER will fund innovative community-led local development projects aligned with the priorities and objectives of the Moray Local Development Strategy. Priorities for funding include employment in the social economy as well as rural enterprise and farm diversification projects.



## Community Asset Transfer

There is a growing interest from community bodies in taking over control of public assets. 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 community organisations, while allowing them to develop new initiatives, support other developing groups and create a strong sense of community identity, cohesion and involvement.

## 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 social enterprise and developing visitor destinations. Since 2012 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.

In August 2016 community asset transfers were successfully completed from Moray Council to the community of the former museum and the hostel. In September 2016 phase 2 approval was received from the Heritage Lottery Fund for the Landscape

Partnership Programme scheduled for implementation 2016-17 to 2019-20. The Council is a full partner in the Landscape Partnership Programme, contributing £50,000 per annum. In 2015 the Council also agreed to continue funding support for the Community Development Trust until the end of 2016/2017 to support implementation of the regeneration plan.

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 (due to open 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

### **Speyside Way Visitor Centre**

Aberlour Community Association has taken ownership of the former Speyside Way Visitor Centre, the adjacent tearoom and the public toilets. Visitor footfall has increased in the two years the Association have been running the building with visitors from over 27 countries enjoying the facilities. The redevelopment of the building includes rewiring, heating and other modernisation projects leading to an enhanced visitor experience including updating and developing new/additional displays. The Association has been successful in utilising the buildings out with the tourist season with fixed term bookings.



### **Former Abbeylands Primary School**

Morayvia currently have a short term lease for the school; whilst operating the Morayvia Sci-Tech Experience visitor attraction focusing on aviation and astronomy related exhibits which will help to inform their future plans. Entirely staffed by volunteers, the exhibition and gift shop is open at weekends with additional times by arrangement and in school holidays. Attractions include a Sea King SAR helicopter, Canberra and Jet Provost cockpits, fire engines and a planetarium where visitors can view a 10 minute solar system or tours of the Moray night sky. The attraction received a 4 star Visit Scotland rating in 2016 and received over 1000 visitors per month. Future plans include investigating options for future premises as they continue to expand; a cinema area is under development and two full time posts are anticipated for next season.



### **Moray LEADER Programme 2014-2020**

LEADER is a bottom up rural development programme based on EC funding which aims to improve the quality of life and economic prosperity in rural communities through locally driven rural development initiatives and projects. Moray TSi has been appointed by the Scottish Government as the lead body for the programme. Moray LEADER welcomes applications for funding from community organisations, businesses and individuals and full details are available from their website [www.morayleader.org.uk](http://www.morayleader.org.uk)



### Future European Funding

The Economic Development team have been working on securing European funding for two Strategic Interventions: an Employability project described earlier in this report and a project to address poverty and social inclusion:

### European Maritime & Fisheries Fund (EMFF)

A Highland and Moray Fisheries Local Action Group (FLAG) has been established in 2016 for a new programme 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)

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

A 2 year debt advice project started in early 2017, part funded by the European Social Fund. The project will particularly target lone parents, people from low income households and people from workless households. The project aims that a total of 800 participants receive advice and assistance with 720 gaining improved money management.

## CASE STUDY

## Elgin & Lossie Harbour Company

Elgin & Lossiemouth Harbour Company has secured funding through the Highland & Moray FLAG to install new heavy duty pontoons providing an additional 10 berthing spaces and to purchase an innovative dredging system to allow regular dredging to be carried out ensuring the pontoons will be accessible at all times. The funding package includes **£75,000** EMFF, **£25,000** Scottish Government & **£95,000** Highlands & Islands Enterprise funding



## 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. In the academic year 2016/17, the Schools for the Future policy will be taking a closer look at educational provision in the Lossiemouth and Buckie areas. These reports have now been published and a further in-depth review of educational provision will be taken forward within the Buckie ASG in 2018.



In 2017 the Council completed the refurbishment of four of its largest primary schools and the new Elgin High School opened in October 2017. Early planning continues for the replacement Lossiemouth High School and for a new primary school, Linkwood Primary which is already operating in temporary accommodation within Elgin. 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.

### Reducing Inequalities

The Local Outcomes Improvement Plan (LOIP) has been developed by community planning partners and is currently awaiting approval from the Community Planning Board. This will focus on addressing inequalities of outcome across the Moray area focussing specifically on raising aspirations for all. This will be achieved by focussing on;

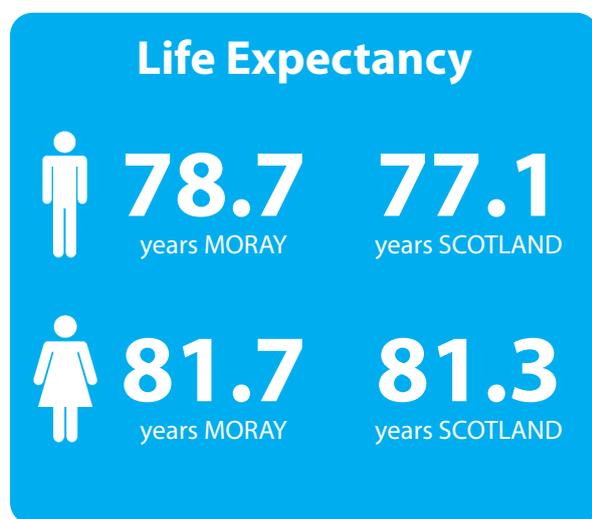
- Building a future for our young people in Moray
- Empowering and connecting communities
- Growing a diverse and sustainable economy
- Changing our relationship with alcohol

### Population and Age Demographics

The 2016 mid-year estimate for the population of Moray was 96,070. Against all 32 Scottish local authorities Moray has the 11th lowest population density with just 43 people per square kilometre. Between 2006 and 2016 the mid-year estimates for the population of Moray increased by 5.8% while Scotland as a whole increased by 5.3%. The relative population increase in Moray was the 12th largest of all 32 local authorities and against the eight comparable local authorities for population dispersion Moray has the fourth largest increase in population. For Moray, the natural change in the population over the 2006 to 2016 period due to births and deaths was very small (-0.1%) and therefore the increase in population was entirely due to migration.

In terms of age demographic, 17% of Moray’s population are aged between 0-15, 16% between 16-29, 18% between 30-44, 22% between 45-59, 18% between 60-74 and 9% over the age of 74. 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 2016 mid-year estimates compared to the 2011 census results for people aged 65 and over are 2.06% higher for Moray against 1.68% higher for Scotland. The challenge of this change is not solely focussed on additional support for older people but also on increased opportunities for those in this group who may want to contribute some of their wealth of knowledge and experience to the community. 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 (81.7 years in Moray against 81.3 years for Scotland) and generally 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 29 year-olds in Moray is 2.1 percentage points less than the national average (16.1% in Moray against 18.2% 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 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 closing the 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.

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.



## 9 Natural and Historic Environment

### Flood Risk Management

The year saw completion of Newmill Flood Alleviation Scheme and Dallas Flood Alleviation Scheme.

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.

Meanwhile, working with SEPA, Scottish Water and neighbours, a major flood risk assessment identified the most vulnerable areas and actions to reduce risk. This means flood studies at Portgordon, Seatown, Lossiemouth, and 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.

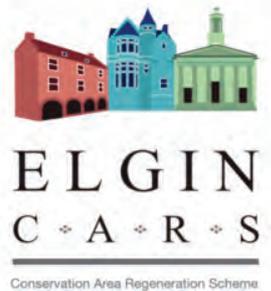
There is a national recognition that responsibility firstly lies with owners and occupants. People can help protect themselves and be prepared in case they flood, and the Council will help raise awareness and provide advice on what can be done. Local policies have recently been reviewed to clarify how the Council will support owners and occupants including a policy on the supply of sandbags.



Elgin Flood Alleviation Scheme

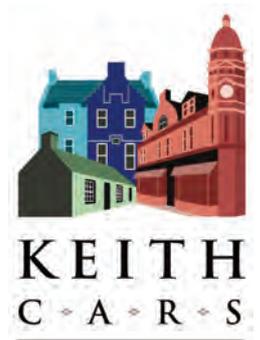
### Regeneration – CARS

Conservation Area Regeneration Schemes (CARS) have been developed 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 will be completed by March 2018. The £3.3 million scheme is overseen by a Management Group which includes Elgin Bid, Elgin Fund, Elgin Benevolent Trust, Moray College UHI, local Councillors and specialist advisors. The progress so far is outlined below with a website for all the information at [www.elgincars.org.uk](http://www.elgincars.org.uk)



Forres (Findhorn & Pilmuir) Flood Alleviation Scheme

**Building Repair Grants** Following 30 properties being offered a Building health Check, 18 contracted to have a schedule of priority works completed on their property and a tender was accepted from a local company for all 18 properties. There have now been 45 grants awarded totalling £888,512 which, combined with Private Investment will result in a total of £2,147,918 worth of investment into the historic fabric of Elgin. For some of these properties, High level access has revealed additional urgent repair works; consequently in excess of an additional £40,000 of Private Investment has been made into buildings within the Conservation Area as a result of the Building Health Checks.

**Public Realm** The Muckle Cross on the Elgin Plainstones has been fully restored, which together with a grant of £31,400 enabled £74,000 of historic restoration works to be carried out. The Cross is a re-creation from 1888 of a 17th Century Mercat Cross. During its reconstruction, the condition of the original Lion, possibly dating from between 1633 and 1650 raised concerns and it is has been retired to the Elgin Museum following installation of its replica which has been recreated in stone to last for the next 400 years.

**Historic Shopfronts** Owners of historic shopfronts have been encouraged to apply for grants resulting in 10 shopfront repair grants being awarded; these restore the traditional features and replace historic detail where appropriate.

**Training:** Elgin and Keith CARS combined budgets to deliver a comprehensive programme of traditional building skills training. Frew Conservation arranged for expert tutors to provide 12 practical day courses for local contractors and building professionals. They also ran informal workshops for homeowners on common repair and maintenance issues. Overall, a total of 117 people attended the training programme. Elgin CARS has also funded 2 stone masonry apprentices and arranged placement with local companies.

## **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 2016-17

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

Development for pop-up shop was completed with a good demand, however so far no suitable premises have been available.

Good progress was been made to meeting key stakeholders - Developers, Agents, Property Owners, Housing Agencies, Builders and Business Owners resulting in two unused upper floors of buildings being purchased by developers in the High Street with plans to create 4-8 residential units; negotiations between Housing agency and a developer for the development of 15 serviced apartments at High Street including ground floor office space progressed but have since faltered as listed building consent was refused by the Scottish Government for the works which were deemed unsuitable; in Moss street a site to create 8 studio apartments was considered & a developer who has undertaken the refurbishment of 2 flats in the High Street had a survey done on another High Street property for converting empty upper floors.

## 2. Lighting Feasibility Study & Plan

The £20k for this project was taken as a saving in closing the 15/16 budget preventing the project from progressing as there is insufficient in-house expertise or capacity to progress it. If an external funding opportunity becomes available this will be progressed.

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

The stage II application to the Regeneration Capital Grant Fund was not successful. However the Government remains interested in investing. One of the key issues is that it is expected that the Moray Council would provide match funding. The future of this project will depend on the final council budget agreed for 18/19 as the Town Hall is currently being considered for either a CAT or closure.

## 4. Vacant Retail Unit Audit

Ground floor units in the city centre to be targeted to include removal of unnecessary signage and develop a strategy with owners to improve the overall attractiveness of vacant properties through use of vinyls. An empty building in South Street was identified for potential future arts based venue. Various talks with the owner have taken place with potential stakeholder to scope out potential future plans. Grant Lodge's derelict look has been transformed through vinyls.

## 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.

Subject to consultation with the Government, it may be included again in a future Regeneration Capital fund application. Match funding will likely be required.

## 7. Car Parking Review & Action Plan

A draft parking strategy was prepared and agreed by the Economic Development and Infrastructure Services Committee in October with elements of charging being subject to further consultation as part of a revised Car Park Order.

## 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

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

Review to be undertaken of priority areas to cover

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

Design solutions to be developed and costed for future reporting to Committee.

No funding streams yet identified. Crossing the A96 has been considered and included in Elgin Transport Strategy.

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

Due to financial pressures it has not been taken forwards yet & it forms part of future plans by the Elgin BID.

As part of the Castle to Cathedral to Cashmere project, projectors have been installed and provide light shows from October to March.

## 12. Cooper Park Masterplan

Potential funding sources such as European Green Infrastructure Fund are being explored, however it requires Match Funding.

## Waste Management

**Service Provision:** Full kerbside collection service provision is now available to all houses in Moray and is being utilised effectively by most residents. Ongoing success can be seen by the increased recycling rate. The recycling rate for 2016/17 was 59.1% with Moray having the second highest recycling rate in Scotland. The current national average in Scotland is around 45.2%. Customer surveys indicate that residents are either satisfied or very satisfied with cleansing services.

The tendering process started for new joint Energy from Waste facility with Aberdeenshire and Aberdeen City Councils due for completion in September 2021, the development of which was significant during 2016/17.

An extension of the waste management facility at Moycroft Industrial Estate was also approved to provide capacity for handling additional waste to be transferred to the new Energy from Waste Plant from 2021 and also allowing movement of operations at Brumley Brea and Lossiemouth to the new facility.



## 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 16-17, which incorporated significant energy performance improvements included the 4 schools project and Forres Swimming Pool.

A five year programme to upgrade existing street lighting to LED technology began in 2015 and continued throughout 16-17, to date consumption has reduced by 7.5%.

## Cairngorms National Park

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

The Cairngorms 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 will lead a review of the Economic Strategy working closely with the Cairngorms Business Partnership, which is the local chamber of commerce, and the wider business community.

A refreshed Cairngorms Economic Strategy will be developed focussing on enhancing existing themes. In addition the new strategy will also consider new economic priorities, emphasise Natural Capital, and plan for post-Brexit impacts on the local economy. The Strategy will closely align with the Scottish Government Economic strategy.

National Park Partnership Plan 2017/2022 has now been approved by Scottish Ministers and the Main Issues Report for the Local Development Plan 2020 is currently out for consultation.



## 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.

### 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. The project aims to build on the Moray Cultural Strategy which presents a series of opportunities for building a strong creative sector in Moray.

In October 2017 a project coordinator was appointed to co-ordinate and organise events, support artists and work alongside public bodies, third sector and business organisations to support and develop sustainable cultural activity.



## The Strategy for Tourism Development in Moray

The Strategy for Tourism Development in Moray was developed under the auspices of Moray Economic Partnership and launched in March 2014. The strategy aimed to:

- Double the economic value of tourism to Moray
- Double the size of the tourism-related workforce, with at least 80% living locally and fully skilled for their job and trained in customer care;
- Achieve annual occupancy of serviced accommodation rooms of at least 75%, and at least 65% occupancy of self-catering units.

## Moray Speyside Visitor Figures 2016

Moray Speyside's visitor numbers for the full year 2016 indicate an £11m increase in economic impact, a significant rise in visitors and an increase in FTE's sustained.

- Total visitors to Moray Speyside have risen to 750,410 up by 6.8%
- Visitor days have risen to 1,799,430 from 1,751,580 up by 2.7%
- The amount of revenue generated by tourism activities has risen from to £117.64m in 2016 – up by 11.2%
- The number of Full Time Equivalent (FTE) employed in the region's tourism industry has grown to 2,769 up by 9.6% on 2015.

**MORAY  
SPEYSIDE  
TOURISM**

### Moray Speyside Tourism

Moray Speyside Tourism (MST) was established in 2014, operates under the auspices of Moray Chamber of Commerce and is tasked with delivery of the

Strategy. MST are the Destination Marketing Organisation for Moray and Speyside – working to support and strengthen the region's tourism industry via consumer marketing activity, business and travel trade engagement, industry capacity & capability building, networking and advocacy.

In the period since MST's formation, visitor numbers to Moray have increased by almost 10%, the value of tourism to the local economy has grown by more

than 15% and the number of full time equivalent (FTE) employed in the region's tourism industry has grown by more than 250.

2016 saw MST continue to work in partnership with key stakeholders to drive forward region's Moray-wide World Host programme, working to recruit tourism businesses to sign up for the scheme. A joint working piece between MST, DYW Moray and Moray Chamber saw World Host Principles of Customer Service training offered to 96 Moray high school pupils. Moray has now become a World Host recognised Regional Destination.

In the past year, MST's focus on building the region's reputation with the worldwide travel trade saw the largest ever representation from Moray at Visit Scotland Expo. Over the course of the 2-day event, the Made in Moray aisle welcomed more than 1000 visitors, hosted 6 specially curated tastings, received a visit from Lord Thurso and the Scottish tourism and culture minister and held 335 business meetings with travel trade professionals from more than 40 countries. Later in the year, an MST organised travel trade workshop held in Elgin offered 20+ travel trade buyers the opportunity to experience first-hand the beauty of the region. In addition to a number of familiarisation visits, the buyers met one-to-one with local suppliers to establish and build commercial partnerships. Already the impact of this event is being seen by Moray Speyside tourism businesses.

Moray Speyside Tourism's future priorities include further development of the region's accessible tourism product, increased engagement with the worldwide travel trade, development of a strong business tourism offer and, most crucially, delivery of a sustainable funding model for the organisation which will provide a stable and accountable framework for continued improvement of the region's tourism performance.



## Museum Service

**2016** was an active year for the Museum Service and the Falconer Museum. The Museum is a visitor attraction and provides a Visitor Information Service in partnership with VisitScotland. Direct visitor figures were consistent with 2015 at just over 6400 (April – October inclusive). Indirect users, including enquiries, group visits, events, Facebook and website hits totalled 43,394 to the end of January 2017.

Community partnerships have been created and strengthened as the Museum has worked with local, national and international institutions; such as UHI, Findhorn Bay Arts, Newbold House, Te Papa- museum of New Zealand, Heriot Watt and Glasgow Universities and The Science Museum, London. Full Accreditation with Museums Galleries Scotland was again achieved. The Museum retained its 5 star Visitor Attraction status with VisitScotland for the sixth concurrent year.

The 2016 season, themed 'Power to the People' explored the history and future of energy – inspired by the work of James Watt, one of the figureheads on the exterior architecture of The Falconer Museum.

With the assistance of the Berryburn Community Fund a diverse programme of events included the making of a kinetic, 'light-bulb' bike, workshops from 'Hands on science' and 'Danger High Voltage' shows provided by The Science Museum, London – in Forres Town Hall – where over 1000 people attended.

The repatriation of the Museums' Maori Skull provided the opportunity to work with Te Papa Museum in New Zealand and provided excellent national media opportunities.

The Museum continued to provide curatorial advice and support to Elgin Museum through MGS's, 'Museum Mentor' programme and informally to members of the Moray Heritage Connections group. Loan boxes, store tours and learning programmes continued to be developed and delivered - boosting indirect visitor numbers, especially during the winter months. The Museum also played host venue to a number of concerts (Scottish Chamber orchestra & Twinning Association) family drop-ins, book launches and a film by Forres Academy. The Friends of The Falconer Museum continued to meet weekly as volunteers and help the Museum Service with collections care, conservation and exhibition preparation.



*The Science Museum, London ready for 'Danger High Voltage' Sep 2016 Forres Town Hall*



## Castle to Cathedral to Cashmere Heritage Experience

This exciting partnership project has brought over 1000 years of history to life and engaged with people of all ages and interests with their heritage in making Elgin and Moray a must see destination. The project is a result of collective working and brought together more than 17 organisations and their volunteers from across all sectors.

As a result of the project, the town now has feature lighting, new directional signage, upgraded maps at the main car parks and a new all-abilities path has been created to improve access to Ladyhill Castle Scheduled Ancient Monument. Two sets of pedestrian counters have been installed at the bottom of Ladyhill giving us for the first time accurate numbers of people going to the top of the hill. These were installed in December 2016 and since then, 37,933 people have been recorded.

49 interpretation panels and plaques alongside with 41 window heritage images at Grant Lodge have been installed, which not only tell the story, but also direct people to the new interactive CCC website [www.elginheritage.scot](http://www.elginheritage.scot) with downloads available for smart phones & tablets for more information and details. 3D high definition scans have resulted in valuable architectural and archaeological data which also provides a platform for developing gaming. Exciting audio recordings are being produced for the site which will further enhance the website and experience. So far the website has received more than 41,240 hits.



An easy to use touch screen orientation table has been installed in St Giles Shopping Centre, which allows people to access information on all the heritage sites within Elgin and all other 41 heritage sites within Moray. Since installation at the end of Feb 2017, 5849 people have used this.



A hugely successful calendar of events, including tours, talks and events attracted over 20,754 visitors and participants into Elgin. The signature event 'Sword, Fire & Stone' - a historical tented medieval encampment created a spectacular interactive programme over two days for visitors & the local Moray community of all ages to participate in. The performances were scripted on the 'Wolf of Badenoch' and the re-enactment of his arrival in Elgin in 1390. The Sword, Fire & Stone event alone brought in 8972 visitors, and there was wide interest with over 26,000 hits on the CCC website and 24,000 hits for the video clip at Re-enactment Event Scotland.



Every evening in October until March, an animated light show is projected onto the back of St Giles church; this depicts people and events spanning over 1000 years of Elgin's history to the present day. Artists were invited to submit proposals for heritage sculptures for the town centre. These were then shortlisted and put to public consultation. The proposals were on display at Elgin Library, Moray College/ UHI, Elgin High & Academy with over 752 responses being posted via postcards of which more



than 200 were from youngsters and additional feedback from social media. The chosen sculptures are the Wolf, Elgin's Town Drummer and the Dandy Lion and an unveiling of the sculptures took place on 17th December 2016 at the Victorian Christmas Celebration. The event created a lot of publicity via social media, was featured on STV and received a Motion in Scottish Parliament.

Elgin Academy and Elgin High School included elements of the CCC project into their curriculum for S3 pupils and older. As a result of this, some students undertook historical research and produced a booklet and presentation about their findings. One class also researched and then wrote fictional ghost stories, which were filmed and are available on the CCC website [www.elginheritage.scot](http://www.elginheritage.scot) and other produced townscape paintings which were part of an exhibition.



### Moray Film Liaison Service

As network partners of the Creative Scotland Film Locations Network, which has 15 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.

The figures, released by Creative Scotland, show spend in 2016 reached £69.4 million – the highest figures since records began, and a £16.7 million increase on 2015. Since 2007, spend has increased more than 200% from £23 million. Through the network, we have had 1089 enquiries which 65% of these projects are now complete and have included feature films, television and drama and others such as commercials and videos and throughout 2016 major international productions have continued to base themselves in Scotland.



## Moray Events

Moray is home to some very exciting and unique events which attracts visitors locally, nationally and internationally. The Economic Development team in consultation with other departments have been working with organisers which have resulted in successful events for the area, two of these major events being:

Piping at Forres, with over 120 bands travelling each year to take part in this prestigious Piping event which has been enjoyed year on year by over 20,000 spectators with over a thousand young being involved both as competitors and volunteers. A new “Northern Light” display, Colours of Cluny, created in 2016, provided a display of light and sound in a new, very colourful light attracted in the region of 12,500 visitors which was successfully run again in November 2017.

## Markets and 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 framework is in place for markets and events to take place in specified locations in Elgin, Forres, Keith, Buckie and Lossiemouth.

In the year ending March 2017 there were a total of 46 events, including 19 markets. Elgin BID have organised events in the towns with the aim of increasing footfall.



# 11 Local Performance Indicators

The following has been devised as a set of local indicators of the state of the local economy. The data for population, gross weekly pay, and percentage of workforce in the private sector are also indicators currently included as indicators in Moray 2026 which is monitored by the Moray Economic Partnership. 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. This dataset is monitored by a sub group of the Regional Skills Investment Plan Board of which the Moray

Council, HIE and University of Highlands and Islands UHI are members. The intention is that the sub group will seek to identify trends and commission any bespoke analysis that may be required to clarify what the statistics may be indicating. The UHI Economic Research Unit also published a comprehensive dataset for Moray in March 2016. In 2016 the Council used these datasets to create a baseline dataset in support of work to develop the Moray Growth Bid. [Information and Research](#) with useful links to statistical websites including the Office of National Statistics are posted on the Councils website. A summary data set will be included when the Moray Economic Strategy is refreshed and will likely replace the following.

Indicator	Moray 2014/15	Scotland 2014/15	Moray 2015/16	Scotland 2015/16	Moray 2016/17	Scotland 2016/17	Moray %change (2015 to 16)	Scotland %change (2015 to 16)
Number of Building Warrant Applications	1092	40,219	986	41,419	882	37,556	-10.55%	-9.33%
Number of Planning Applications	789		718	28,803	596	26,990	-16.99%	-6.29%
Private Housing rental (2 bed av mean monthly rents)	£545	£610	£561	£616	£575	£643	2.50%	4.38%
Average House Price	£156,596	£167,346	£151,569	£166,543	£154,241	£166,734	1.76%	0.12%
House Sales	1,658	92,501	1,748	99,391	1,749	99,972	0.06%	0.58%
Number of Enterprises	3,135	168,275	3,190	171,900	3,195	174,625	0.16%	1.59%
Population	94,750	5,347,600	95,510	5,373,000	96,070	5,404,700	0.59%	0.59%
Gross Weekly Pay by workplace (all full time workers)	£489.80	£527.00	£488.10	£534.50	£498.10	£547.30	2.05%	2.39%
Gross Weekly Pay by residence (all full time workers)	£491.10	£527.00	£496.30	£536.00	£497.90	£547.70	0.32%	2.18%
% workforce in private sector	79.0%	73.8%	77.7%	73.4%	81.3%	74.1%	4.63%	0.95%
New businesses were supported to start-up with one-to-one advice	121	10,103	128	9,087	132	10,629	3.13%	16.97%
Job Seekers Allowance Claimants /March	925	84,970	1,120	80,755	1,280	83,760	14.29%	3.72%





