

ITEM: 12
APPENDIX 1



economic development
Annual Review 2015/16





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1 Introduction

This is the second Economic Development Annual Review, the intention behind this being to provide a comprehensive overview of major economic development activity driven or closely supported by the Council during the financial year. As with the first report, 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 2016 and beyond is also provided where this is helpful.

Having reflected on the period from April 2015 to March 2016, four developments stand out for me in terms of their economic significance for those living and working in Moray.

The first major development was the decision taken in March 2016 to end the Western Link Road project which had been endorsed as a key element in improving the road network in Elgin for over a decade. This decision was taken as part of the review of the Council's programme of capital expenditure, and whilst there was strong opposition to the route for a number of years, the gathering financial pressures faced by the Council ultimately led to the conclusion that the project was unaffordable. Since that decision, a new Transport Strategy for Elgin has been developed and is currently out for consultation. This strategy contains alternative proposals to keep traffic moving in an efficient way around the town and the proposals have been well received to date.

Financial pressures continued to set the context for strategic planning in Moray as the Masterplan for the regeneration of Elgin City Centre emerged in August 2015. This plan was the result of a series of public design events known collectively as a charrette, and set out a vision for Elgin in 2025 split into 3 key themes around regeneration and re-use of buildings, orientation and connectivity and reasons to visit the town. From a host of actions identified under these themes, a short term action plan focusing on projects viewed as affordable and which could produce early tangible results was agreed. This set out twelve projects including lighting in the town centre, public access wifi and a review of the bus station layout. Unfortunately the lighting project was placed on hold as internal finances were redirected to higher priority areas. A number of projects did progress however, including the work to get vacant retail units back into occupation which continues, the car parking review which informed the Transport Strategy and is due to be reported on shortly and the streetscape review which is also ongoing. Meantime, a bid for funding from the Regeneration Capital Fund for redesign of the exterior of Elgin Town Hall based on ideas generated in consultation with the local community, the Bus Station reconfiguration and public access wifi has reached the second stage of the application process. Additional funding opportunities are constantly reviewed to enable further projects to progress.

The third major development was completion of Elgin Flood Alleviation Scheme in January 2016, the culmination of a planning and construction process which started in 2004. This is the largest flood alleviation scheme in Scotland and protects 600 homes and 250 businesses. Flood Risk Management Strategies covering Moray for the period from 2016-2022 were also given ministerial approval over this period, with Local Delivery Plans agreed during the summer of 2016. Feasibility assessments looking at small schemes for Hopeman, Dallas and Portessie were also progressed. Viewed cumulatively with the completed schemes for the Burn of Mosset, Forres, Rothes and Llanbryde, this represented a step change in flood protection and planning for Moray and placed us in an enviable position compared to other less fortunate areas when Storm Frank struck in 2015. Elgin Flood Scheme has since gone on to receive a Saltire Commendation from the Society of Civil Engineers.

Lastly, work to publicise the commercial opportunities available at Buckie Harbour, building on the masterplan published in January 2015 continued and began to bear fruits with agreements reached to provide support for both the MORL and Beatrice Offshore Renewables fields, augmented by growing interest in the industrial units to be developed by the Council at March Road in Buckie. Whilst support for MORL will be dependent on the pending auction through which contracts for offshore renewable energy generation are awarded, and the main support port for Beatrice is Wick, opportunities from existing commercial interests and also around the expanding decommissioning market continue to be explored.

I hope that you find the contents of the review helpful, but if you have any questions, please get in touch.



A handwritten signature in black ink, appearing to read 'Rhona Gunn', written over a light blue grid background.

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

January 2017

2 The Strategic Context

Moray 2026

“Moray 2026 – a Plan for the Future” was first framed by the Moray Community Planning Partnership in 2014 following the gathering of extensive evidence on key issues across Moray and consultation with local communities. 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.

In order to measure progress in growing a diverse and sustainable economy, a range of targets were also 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 Economic Strategy

During 2016 the Moray Community Planning Partnership established a new group known as Employability Moray. This is the strategic partnership group which oversees the development of employability activity in Moray including progressing the Developing the Young Workforce governmental initiative, promoting lifelong learning and leadership and coordination of the Moray Skills Investment Plan. Because of the importance of a skilled workforce to the performance of the economy, there will be liaison with the Moray Economic Partnership on matters that cut across the interests of both partnerships. Employability Moray is currently consulting on a revised Employability Strategy and developing new targets for Moray 2026 on employability.

The Moray Economic Partnership (MEP) Board meets four times per year. Operationally supported by the partnership programme groups, during 2015-16 the partnership advanced various initiatives and projects including but not limited to:

- Monitored the economic targets included in Moray 2026;
- Co-ordinated media services to promote the work of the partnership & Moray as a place to live, work & visit;
- Supported Scottish Apprentice Week
- Considered support for Strategic Interventions for Employability & for Poverty & Social Inclusion
- Considered an action plan for Elgin Town Centre Regeneration
- Considered a campaign action to advance improvement to the A95 identified in the Jacobs study;
- Considered the HIE report on the attitudes & aspirations of young people, which outlines possible actions to help address people retention;
- Maintained a dialogue with the MOD on potential reuse of any surplus land at Kinloss as a Spaceport or other uses to benefit the economy.
- Considered the 2016 Regional Skills Assessment;
- Supported the 2nd Annual Moray Business Week;
- Considered the Moray Council Budget projected shortfall to make £14.3 million of savings in 2017/18 & its impact on services.

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 www.yourmoray.org.uk/ym_standard/Page_104_984.html

The partnership is guided by the objectives and outcomes included in Moray 2026. These draw on the Moray Economic Strategy which was adopted by the Community Planning Board in 2012. A refresh of the strategy is being undertaken to reflect changes since 2012 and also to support the developing bid for Growth Funding the work for which began in the summer of 2016 and which it is hoped to the point where funding negotiations are formally opened in 2018.

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 identifies what the Council as a single agency will 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, and this correlation is detailed at Section 11 on page 42.

Given the impact of Local Government elections in May 2017, the Corporate Plan has not yet been refreshed, but a process to enable this to be done was agreed in August to ensure that the Corporate Plan for 2017-2022 will incorporate the Council’s financial plan to demonstrate the explicit link between improvement targets and the resources required for their delivery.



4 Tiers of Priority

During 2014, officers engaged with Councillors to establish the Council’s priorities in the context of Moray 2026. The engagement sorted generic economic development activities into groups with Tier 1 being the highest priority. The results are shown below. These will be updated once the priorities for the next Corporate Plan have been agreed with the next administration.

Tier 1	Spaceport, Buckie harbour expansion, maximise external funding on priorities, supporting small & medium sized enterprises (SMEs) through business gateway, promotion of Moray, supporting improved road, rail & air communications, securing broadband and mobile phone networks.
Tier 2	Development by the Council (infrastructure, housing, and industrial); school & further education (Skills Pipeline); youth employment (professional & skilled jobs); vibrant town centres.
Tier 3	Tourism marketing, business support, visitor information & orientation, procurement (supplier development), developing tourist destinations, economic research;
Tier 4	Seed funding for events; community facilities, & infrastructure: (walking trails, bikeways, sports facilities, recreational facilities & cultural facilities); employability; harbour maintenance (except Buckie).

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 £100 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 and the Community Planning Partnership are looking to support the development of the Moray Growth Bid over the next 18 months.

Inward investment and development is a critical aspect of sustainable economic growth for Moray. The Local Development Plan (LDP) 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) Local Development Plan (LDP)

The 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. Since its adoption good progress has been made in the development of Supplementary Guidance and processes to help deliver development, including Rural Groupings, Developer Obligations, Wind Energy, and Accessible Housing. Progress is also being made on the preparation of the Open Space Strategy and Woodland Strategy. Progress has been made to improve design quality and the processes in place to raise design standards. Work has been ongoing to help facilitate development including working with developers on progressing masterplans, including at Elgin South, Findrassie north Elgin and Dallas Dhu Forres.

An Infrastructure Delivery Group (IDG) has been set up to co-ordinate the long term planning for growth between the community planning partners and infrastructure providers. This group initially consists of the Council's Education Service, Transportation Service and NHS Grampian with scope to include other Council Services and infrastructure providers as required. The remit of the group is to project and cost future infrastructure requirements with the long term aspiration of aligning investment plans to reduce public sector costs and to monitor the delivery of developer obligations.

Early preparation work has started to prepare the evidence base for the next Local Development Plan, with the next Main Issues Report programmed to be published in 2017.



ii) Development Management - Planning and Building Control

Housing

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 delivery major projects both public and private in an efficient, streamlined manner which provides certainty for the developer and also achieves the Council's number one priority of Sustainable Economic Development as set out in the Moray Council Corporate Plan 2015-17.

Having an up to date and recently Adopted Moray Local Plan 2015 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 new approach to working with developers and providing pre-application advice to developers 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.

The Economic Development & Infrastructure Services Committee agreed on 29 October 2013 to acknowledge that sustainable economic development is the Council's main priority and to note that in assessing the 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.

The Planning Performance Framework (PPF) is submitted annually to the Scottish Government on an annual basis and sets out in detail 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 15/16 and we anticipate that improvements in the current financial year will be reflected in the next PPF report.

Application numbers have remained broadly consistent with previous years and performance has continued to improve with the average time for local applications at 7.5 weeks and householder applications also 7.5 weeks which is a significant improvement from 23.1 weeks for local application in 2011/12. The service has completed the task of

removing legacy cases from the system, and improved performance for major applications. At the end of 2016 it received two national Planning awards for work done in 2015-16 for the Findrassie Master plan and the introduction of a Quality Audit process into the determination of planning applications.

Case Study: Findrassie Masterplan

The Findrassie Masterplan, developed in a strong spirit of collaboration, specifies design and technical requirements for a new neighbourhood which will form the northern extension of Elgin over a 25 year period.

The Findrassie Masterplan, is both ambitious and deliverable in its design for a new neighbourhood north of Elgin. It emphasises high quality landscape-led design, and will deliver 1500 homes, 12 hectares of employment land and community facilities.

Findrassie resulted from a collaborative planning and design process, involving landowners, (Pitgaveny), Moray Council, Savills, a specialist consultant team (Masterplanners EMA, Ironside Farrar Engineering, Transport Planning, Landscape Architecture, Ian White) with Architecture & Design Scotland providing design review.

A comprehensive engagement process involved the widest possible community of Elgin in planning this neighbourhood. An ongoing innovative schools programme uses Findrassie as a “live project” to get young people involved in deciding how their town will grow.

The Landowner and the Council’s Planning Department had a shared concern for the quality of existing development in Elgin and were united in their desire to use the Findrassie masterplanning process to raise the bar for urban design in Moray.

A key success factor for the Findrassie Masterplan was the combination of a committed and aspirational landowner united in vision with a Council Planning Department, both intent on creating top quality spaces for the long term enhancement of Elgin.

The willingness of Pitgaveny to “go many extra miles” gave the Council a standard to hold other developers to. There has been noticeable improvement in the quality of other subsequent masterplans as a result.



i) Local Housing Strategy

During 2015/16, the Council's new build programme delivered 96 house completions with a further 16 under construction at year end. The Council also purchased land for 15 houses. The 96 completions will contribute to the Moray 2026 target of 50 council houses to be built per annum over the next 10 years.

The total amount spent on new Council housing in the financial year 2015/16 was £10.037m. This included £5.377m of Scottish Government grant funding. This represents a significant investment in an area recognised as a key enabler of economic development. The proposals for the Council's new build programme are set out in the Strategic Housing Investment Plan which makes provision for investment in 196 new Council houses during the period 2015-18.

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 2016 Audit shows that the Council has maintained a 5 year effective supply. The 2016 Housing Land Audit shows an effective housing land supply of 4958 units, which equates to 9.2 year effective housing land supply. This is a significant increase from 2474 units in 2015 due to the adoption of MLDP 2015.

House completions in 2015 were 337, compared with 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 2010-2015 were for housing projects in Elgin, Forres and Buckie. Development rates in Keith and towns in Speyside continue to be low and Officers are looking at how existing sites can be made more effective. Consideration is also being given to sites which have been in successive plans with little sign of progress and if these should continue to be identified.

Commercial

i) Industrial Portfolio

In 2015/16 the Council completed the development of 7 new business units in Forres and Burghead within budget and all were let soon after construction. This gives a total of 32 new units (in various locations) having been completed within budget and successfully leased to small businesses since 2010.

In addition, a refurbishment/upgrading programme is on-going in relation to existing properties, to ensure they remain responsive to future business needs. The Council also purchased a vacant commercial property in Buckie and leased it to a local business. European funding support was secured for a number of these development projects.



New business units in Forres

Case Study: Burghead Industrial Estate

For a total project cost of £220,000 including an award of £66,000 from the European Fisheries Fund Axis 3, a terrace of four new industrial units has been completed at Burghead harbour. The units, which range in size from 58sq meters to 110sq meters, have easy access, parking and disabled toilet facilities. The new premises will provide five or six jobs for new or growing businesses in the area. Three of the units have

already been leased – to a marine engineering firm, an artist and a co-operative which provides training and recycles furniture and wood. Interest has also been expressed in the fourth unit.

Occupancy rates remain near capacity and the Council is considering further proposals to expand the portfolio to provide sites and buildings to meet business needs. The Council is seeking to provide further commercial sites and buildings at March Road Buckie over the coming year.



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. Despite featuring in several economic development strategies and local development plans for Moray over the past two decades, the public and private sector have been unable to develop the preferred location, 30 hectares of land at Barmuckity, to the East of Elgin.

The key blockage in this development has always been the cost of the infrastructure required in what is a large but constrained site. There remain flooding issues, and an overhead power line, which restrict the net developable area. There now appears to be a desire to progress the development if a partnership approach can be developed by the developer, landowner, HIE and Moray Council.

iii) HIE/ Enterprise Park Forres

The Enterprise Park Forres (EPF) is one of the premier business locations in the North of Scotland. HIE purchased the park in 1997 and has invested circa £23m to date. There are currently 11 buildings on the park (107,600 sq ft), 8 of which are owned by HIE (70,600sqft).

EPF includes Horizon Scotland, a Business and Innovation Centre owned and operated by HIE, with 16 units.

Over the past 5 years there has been considerable activity at EPF, with a new road completed and three buildings completed with shovel ready funding.

There remains 33 acres of the park to develop, some further building concepts have been drawn and enquiries are being progressed.

Work is progressing to let the available space, to sell vacant plots and to put consents in place to develop the remaining area of EPF. Further work will be done to refresh and update the proposition material that exists for the park, and to examine ways of reducing construction costs whilst maintaining the quality of the park.

Over the next 6 months HIE plan to take forward a Planning Permission in Principal application.



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 demonstrate changes in performance that can inform future decision making.

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.

To help support vibrant and vital town centres, in Keith a Pop-Up Shop project was facilitated by the Conservation Area Regeneration Scheme which resulted in 3 separate businesses being successful enough to open their own shops. Facilitated by staff, Elgin BID has been working with property owners to wrap the windows of vacant shopfronts. Workshops on window dressing have been facilitated for business owners and Worldhost customer service training is being rolled out across Moray supported by People 1st, Moray College, the Chamber of Commerce and HIE, workshops and advice on marketing and promoting business is available from Moray Business Gateway.



Before and after - Keith a Pop-Up Shop

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. The 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 currently being the work to dual between Hardmuir and Fochabers. June 2016 Transport Scotland awarded a contract to Mott MacDonald Sweco Joint Venture to carry out route options assessment and detailed design work. It is expected that the route options assessment work will take approximately 2 years to complete.

Traffic Management In Elgin

The Council in March 2016 agreed to remove the budget for the Western Link Road project, - previously viewed as the solution to identified

distribution issues within Elgin -from the Capital Plan and as a consequence the Council will no longer be delivering this scheme. The Council is now developing a Transport Strategy for Elgin that will support development growth and reduce congestion in Elgin by delivering a range of interventions on the network and promoting walking and cycling.

A95

The importance to Moray of the A95 between Aviemore and Keith, particularly in its role as a freight corridor has been a focus for the Council. It is also a priority for the Moray Economic Partnership. Whilst there is no straightforward case for investment on standard transport appraisal methodology, the economic value of the route is clear. Work has started to unite the businesses and organisations who rely on the route to lobby for improvements to protect this important artery.



Buckie Harbour

The Council is currently in dialogue with the BOWL offshore renewables field developer to secure Buckie Harbour as a contingency port for the BOWL wind farm. The Council continues to support the development of the MORL windfarm by identifying options to support operations and maintenance within the harbour area. The MORL windfarm is subject to successful award of Contract for Difference auction by the UK Government which is expected to be awarded in June 2017. Working with the windfarm developers, has generated interest in the industrial units to be developed by the Council at March Road in Buckie that will further support the windfarms in the Moray firth.

Promoting the harbour and opportunities available in the surrounding area has led to initiating discussions on the sale of the shipyard, and providing support for decommissioning.

It is anticipated that during 2017 key decisions will be made that could potentially realise the opportunities for the harbour and deliver a sustainable and diverse future for the harbour.



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.

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 value of this service and the innovative approaches to providing transport in rural areas were recognised in Dial M being awarded the Campbell Christie Public Service Reform Award in December 2015. In addition to the demand responsive service across Moray, and two scheduled bus services introduced in 2014-15, the end of the 2015-16 year saw the decision to introduce a further two scheduled bus services, linking Kingstons, Garmouth and Urquhart with Elgin and linking Marypark, Knockando and Archiestown with Elgin

The principal focus of community transport is to minimise social exclusion and provide access to services (particularly healthcare) for people with no

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 2015/16 as follows:

- Moray Walking Festival- the 4th 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 and promotion and events support. eg Kiltwalk
- Whole Core Paths network-12 new/replacement signs as part of annual Core Paths signage programme.

- Core Paths small works winter programme – Included a range of surface/ drainage improvements , eg surfacing wet section of Loanie Road, Dyke; ditching and resurfacing of Covesea Path; vegetation clearance at the Crannoch Path, Cullen; vegetation clearance of the remote section of the fishwives path.
- Enabling and support of community path projects. This includes completion of a Feasibility study for an off road extension of the Isla Way spearheaded by the Drummuir21 group.
- 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.

Active Travel



Moray Council continues to promote Active Travel (involving physical activity, cycling and walking) through the development and maintenance of the active travel network and a programme of soft measures to encourage use of the network. During the 2015/16 financial year new routes were completed in Dufftown and Forres with design work for other routes in Buckie and Elgin. The programme of soft measures received a boost with a grant of over £85k provided from Paths for All under the Smarter Choices Smarter Places programme, combined with the match funding from a variety of sources we engaged with residents and school children across Moray to provide greater information about alternatives to motor vehicles and to encourage their use. Active travel remains the travel choice for a significant number of people, although the proportion choosing active travel is slightly less than in previous years.

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).

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

Including commercial coverage (i.e. BTs own coverage) the percentage of premises in Moray with access to Next Generation Broadband(NGB) is 89% as of July 2016 and is anticipated to be at 93% by the end of 2016.

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 are not yet available

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. Significant work has been going on to enable the build of a new station at Forres, and the closure of Waterford level crossing, as well as resignalling and capacity works in Elgin.

Work has continued through the Highlands and Islands Transportation Partnership (HITRANS), the regional partnership of which Moray Council is a member, to gain funding for a new railway station at Inverness Airport. Design works have been undertaken alongside an application to the Scottish Stations Fund. This new station will assist in integrating the different methods of travelling without the use of a private car.

Timber Transport

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

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

According to the Timber Transport Forum, the ceiling price for sawn timber is fixed by the European/Scandinavian market, at the price they can provide sawn timber to the construction trade in England. This limits the industry's capacity to contribute to local authority road improvements which is perhaps why, for the last ten years, the



Scottish Government has provided a Strategic Timber Transport Fund of £3m/ to help address timber transport issues.

It is not yet known whether that fund will be renewed when the current round of funding ceases in March 2016. The Council will consider these issues as part of its asset management planning process.

Within the last 3 years the Council has received funding from the Strategic Timber Transport Scheme of £330,000 towards improving the existing roads infrastructure.

Timber transport is a particular kind of freight transport. Transport of general freight by large goods vehicles, whether into distilleries or farms or construction sites etc. can equally affect the condition of our public roads network. This can be anticipated for larger developments that go the planning process and it is sometimes possible to get a contribution from developers to mitigate against damage. Sometimes legitimate use of public roads, for example by farmers taking delivery of pot ale to act as a fertiliser, severely test road condition. There is no obvious solution to this in the long term as imposition of weight limits, for example, can usually only be temporary unless alternative routes exist.

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 a new Employability Moray Partnership has been established, reporting 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 Skills Investment Plan Group
- 3 Lifelong Learning Forum

Youth Employment Project

This Scottish Government funded project came to a close at the start of the year. During 2015/16, six young unemployed people were placed with jobs in small-to-medium enterprises in Moray – with the companies receiving a 50% grant for the first six months of their employment. Overall, the three year project placed 121 young people into jobs in Moray.

Employability – future project

A funding application was made to the European Social Fund, whereby Moray Council aims to lead a 2 year project, with local partner organisations, which would see over 100 unemployed people assisted into work. A further 100 people would receive training and qualifications which would take them closer to achieving their goal of getting back into work. The result of the European funding application is expected in the coming year.

Activity Agreements

Activity Agreements are for young people who are identified at stage 1 of the employability pipeline. 55 young people participated in Activity Agreements from April 2015 – March 2016. The Activity Agreement service has been further developed to include a wider range of activities for harder to reach unemployed young people. The majority of referrals have come from Skills Development Scotland, care services and schools

Participation Measure (16 Plus Data Hub)

A range of local partnership organisations within the authority have been involved in the development of this new youth employability data measure. The new measure of participation will allow employability partners to analyse how young people are sustaining positive destinations by recording their engagement over a period of 365 days. School leaving destinations are still crucial in ensuring that post-16 transition planning processes in school and post school are in place. In particular, these will focus on vulnerable young people including those leaving care, with disabilities and additional support needs.

Developing Young Workforce in Moray

Local employability strategic partnership groups worked together to agree on how Moray responds to the recommendations within the Development the Young Workforce (DYW) National strategy. The recommendation is that regional groups will be industry led. Moray Chamber of Commerce successfully secured Scottish Government funding to form DYW Moray (regional group) in January 2016

A DYW Operational Group has been developed to look at all recommendations to map current activity against recommendations to create a Moray wide action plan

Moray 2026 refers to ambitious and confident young people, and economic development that 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 if the world of work. Budget has been secured for 2016/17 to second a member of staff, from Skills Development Scotland, to embed career management skills in curriculum practice.

The Moray Skills and Training Pipeline

Most organisations in Scotland recognise the Strategic Skills Pipeline model, which has been developed as a framework to support the effective delivery of employability services.

The Moray Skills and Training Pipeline in line with recommendations is divided into 5 distinct stages that support the employability journey. The 5 stages provide a map for the job seekers journey and also provide the job seeker with information at each stage on local organisations that can support them to progress through the stage and on towards employment.

The Skills and Training pipeline aims to promote progress, moving the individual from not being job ready to job ready and on to aftercare, supporting the person to sustain their employment. However, although the pipeline is set out in stages people do not have to go through each stage and may dip in and out at various stages to find the right organisation that can help them to progress in to and sustain employment.

Skills Development Scotland reported a breakdown by Stage and Local Authority Area Period from 1st April 2014 to 31st March 2015 (Operating Year) for the Employability Fund training provision. The employability fund provision provides training in Moray for clients who require provision at stage 2-4 of the employability pipeline. There was a total of 139 starts, 22 at Stage 2, 54 at Stage 3 and 63 at Stage 4.

Positive Destinations

In June 2016, Skills Development Scotland published results of the School Leaver Destination return (2014/2015). This return is based on a follow up of young people who left school between 11 August 2014 and 31 July 2015. 92.7% of school leavers progressed on to positive destinations. In March 2016, 88.1% of these school leavers were in a positive destination.

Table 1: 2014/15 initial and follow up destinations in comparison to Scotland

Destinations	Scotland			Moray Council		
	Initial (%)	Follow Up (%)	% point change	Initial (%)	Follow Up (%)	% point change
Higher Education	38.3	36.4	-1.9	37.7	34.9	-2.8
Further Education	27.8	23.5	-4.3	28.3	22.2	-6.1
Training	3.8	2.8	-1.0	1.0	1.4	0.4
Employment	21.7	28.2	6.5	26.6	30.5	3.9
Voluntary Work	0.4	0.4	0.0	0.2	0.3	0.1
Activity Agreement	0.9	0.8	-0.1	0.4	0.5	0.1
Unemployed Seeking	5.4	5.7	0.3	3.4	5.5	2.1
Unemployed Not Seeking	1.1	1.6	0.5	1.9	2.5	0.6
Unconfirmed	0.5	0.6	0.1	0.4	2.1	1.7
Positive Destinations	92.9	92.0	-0.9	94.3	89.9	-4.4
Total Leavers	53,834	53,654		1,167	1,163	

Please note that percentages may not total 100% due to rounding

Senior phase and 16 plus transition planning processes within all 8 Secondary Schools and Pinefield Parc continue to be supported. The Schools will be able to use Insight Reports to look at their individual school leavers destinations and this data is obtained from the new 16 plus Data Hub. The participation measure will replace the School Leaver Destination Return (SLDR) from August 2015 and includes tracking young people from the age of 16-19 years.

Employability Fund Training Providers

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.

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 2016 showed an increase in the overall supply of employment land due to the introduction of new sites on adoption of the Moray Local Development Plan 2015. However, the audit highlighted a shortage of immediately available serviced employment land and a shortage of effective land within Elgin.

Constraints on land within Elgin need to be addressed and new land must also be identified within the next Local Development Plan to ensure Elgin remains a focus for growth. Discussions are taking place with the landowner, a developer, Highlands and Islands Enterprise and the Council to examine how the site at Barmuckity could be made viable to allow development to take place. A Strategic Framework has been developed to provide a framework in both land use and landscape terms to set the context within which all future proposals and planning applications will sit. The balance of uses within the framework aims to promote delivery by ensuring the project is economically viable.

In Forres, investigations are continuing into the potential for new land to be allocated at Waterford, particularly given the proposed new road link between the A96 and Waterford Road. At Buckie, the Council has progressed the acquisition of a site at March Road and have submitted a Proposal of Application Notice for the site.



New units at Findhorn



Aerial view of Barmuckity looking west

Procurement

The main focus of activity for this year has been the work done to incorporate the new duties contained within the Procurement Reform (Scotland) Act 2014. 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 develop a Strategy and 5 point action plan that will support local business growth, improve local investment, environmental wellbeing, encourage diversification and equality, and create opportunity.

We continue to hold supplier roadshows and surgeries for specific contract opportunities, supporting businesses through our processes particularly our use of pubiccontractscotland.gov.uk to advertise our opportunities.

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 2015/2016:

128

new enterprises started with support from **Business Gateway Moray**

154

jobs were created or retained as a result of these new enterprises starting up or being purchased

21

start-up skills workshops were delivered to **197 attendees**

27

workshops for growing businesses were delivered with **274 businesses attending**

12

digital ready workshops delivered in partnership with HIE with **130 attendees**

56

new and growing businesses were supported with access to finance / Investor ready advice. BG interventions resulted in them securing **£1.1m of funding** from various lenders.



In November 2015, Business Gateway facilitated the second annual Moray Business Week attracting over 400 growing businesses to a series of events & workshops. The 1 year and 3 year survival rates of business start-ups assisted and still trading in 2015-16 in Moray was slightly below the national average. The overall one year survival rate across Scotland in 2015-16 was 78%, and this dropped to 66% when looking at the three year survival rate. The rates in Moray were 75% and 63% respectively. These numbers can vary substantially each year based on local and national factors including the availability of alternate employment.

Business Gateway Moray reports are posted quarterly on the Councils website.

Going forward in 2017/18 – additional support will be delivered as follows:

- Business Gateway will be introducing a new Local Growth Accelerator Programme which will include:
 - Leadership and Growth masterclasses
 - Access to finance events
 - Specialist advice
 - Recruitment Advisory Service
 - Graduate Placement Programme
 - Business Growth workshops
 - Key sector and regional Specific support
- Collaborating to introduce a local **Supplier Development Programme** to ensure businesses in Moray are better able to access public sector contracts and supply chain opportunities – toolkit being developed.
- **Launching in Dec 2016** Business Gateway Moray will be administering a new fund - **Business Loan Scotland** - giving SME's the opportunity to access loans between £25K and £100K to help them grow their businesses

The Scottish Business Pledge is a Scottish Government initiative encouraging businesses to sign a 3 part pledge.

- 1) That all of their employees, except apprentices and those under 18, are paid the living wage.*
- 2) Choose at least two other pledge elements the business is already delivering. These are:
 - a Not using exploitative zero hours contracts
 - b Support workforce engagement & development
 - c Invest In youth
 - d Gender balance & diversity
 - e Innovation
 - f International business
 - g Involved with community
 - h Prompt invoice payments
- 3) Commit to working on the other pledges (a to h)

The pledge is voluntary. Businesses can display the logo if they have made the pledge. The Moray Council involvement is via Business Gateway (BG) Moray which offers assistance to businesses to help them make the pledge.

BG Moray and Highlands & Islands Moray office have been bringing up the subject as part of their regular company growth relationships, but the challenges associated with meeting the pledge requirements in a rural economy are recognised.

For more information

<https://scottishbusinesspledge.scot/>

* (Note that this refers to the Living Wage Foundation rate, currently £8.45. This is different to the UK Government new National Living Wage which is on 1 October 2016 £7.20.)

Elgin Business Improvement District (BID)



Business Improvement Districts are business led partnerships which are created through a ballot process to deliver additional services. They can be a powerful tool for directly involving local businesses in local activities and allow the business community and local authorities to work together to improve the local trading environment.

The City of Elgin Business Improvement District (BID) was first launched in 2009 and was renewed in 2014. Following consultation and research, resulting in a successful Yes vote, Elgin BID will continue to deliver the various themes set out in their business plan for a further five years and work in partnership towards creating a vibrant city centre.

During 2015/16 work included;

- Elgin BID secured funding for the Moray Economic Partnership, used to provide reduced cost WorldHost Customer Service Training for Moray businesses. Elgin has secured WorldHost Destination Status.
- A new web site has been created at www.embraceelgin.co.uk, providing information to businesses, the public & visitors. It includes promoting vacant properties.
- Elgin BID has introduced a Comfort Scheme, supported by members opening their toilet facilities to visitors.
- The street sweeper operates 3 days a week, supplementing TMC's statutory obligations.
- Elgin BID attends the Moray Towns Partnership meetings and promoted Elgin and the region at the Visit Scotland Tourism Expo.
- Social Media drop in sessions are being run, offering 1 – 1 bespoke guidance on Social Media platforms and strategies.
- Working with partners to re-introduce the Best Bar None. Awards were presented at the BID Business Awards. (Best Bar None is a unique National Award Scheme aimed at raising standards and rewarding licensed premises who undertake positive management practices through an assessment process).

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: a weekly cinema event in Buckie assisting with the European Piping Championships event in Forres and the Seafest event in Lossiemouth and running a “pop-up” shop in Keith’s Mid Street. The 4 towns also worked together, along with Elgin Business Improvement District to promote Moray at the annual Visit Scotland Tourism Expo – this was done in collaboration with Moray Speyside Tourism. Funding for the projects came from the Moray Council.



7 Social Enterprise

Social Enterprise has become a more established aspect of Economic Development in Moray and has begun to show rewards in the form of employment and the provision of innovative new service. The implementation of the Community Empowerment (Scotland) Act 2015 opened the door for a range of new community and social enterprises through the right to buy being extended and the new regulations around Community Asset Transfers and participation requests raising the possibility of communities providing services.

Moray Council continues to support a number of potential Social Enterprises through the Community Support Unit and Community Asset Transfers. There have been a number of notable success stories for example the opening of Morayvia, Forres Tolbooth, Milnes Institute and the Inkwel. The Council's Community Support unit has provided support for the establishment and to the initial business planning of these groups. Developments have started to materialise in Cabrach with the establishment of the Cabrach Trust and the production of their Development Plan based around the asset transfer of the former primary school. In Tomintoul there has been significant developments and funding around the museum and the hostel. Both of these organisations have appointed development managers and have been successful in attracting major funding for the development.

tsiMORAY continue to develop their support to Social Enterprises and have recently organised a successful peer learning visit to Shetland for a number of Moray Social enterprises i.e.: Covesea Community Lighthouse, the Inkwel and Morayvia .

TsiMoray provide and service the Moray Social Enterprise Network.

Moray Social Enterprise network is over a decade old and has 38 established social enterprises, 17 new start organisations and 14 other organisations such as enterprising charities, sports clubs or community groups. Regular meetings have a focus on networking, peer support, building social capital and creating potential partnership. A new initiative a drop in hub is held on the first Monday of every month. TsiMORAY's core work is in supporting start-ups, enabling growth, promotion and awareness of Social Enterprise including work with schools and the wider community.

Moray has some well-established enterprises such as VIP childcare, ReBOOT, Housing Associations and Findhorn Foundation based groups, Elgin Youth Café, Wild Things, REAP, In Stitches and Moray Waste Busters. There are also many new and embryonic organisations since last year such as the employment focussed 'RAY's opportunities' which is a new and exciting training organisation that works with young people who live with disabilities such as autism. New enterprises such as the Cabrach Trust Moray Sports Centre and 'Friendly Access' are developing quickly. 'Friendly Access' will provide consultancy and support to organisation seeking to improve access to people with Hidden disabilities e.g. (autism) The individual entrepreneur behind the scheme has been working with the national Autistic Society and providing guidance and support to arrange of service providers and employers such as Transport providers. The Moray Wellbeing Hub is in the process of becoming a Social Enterprise.

The Moray Wellbeing Hub project aims to create new community and virtual spaces that welcome everyone to live more mentally healthy lives. To do this we work to empower individuals to use their life experiences to better understand and self-manage their wellbeing but also provide support for others. Examples of current projects include running self-management workshops, seeding peer-support groups and working alongside service providers in health and social care to better promote the concept of recovery. It is a CIC and led by members

Community Asset Transfer

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 Hostel and Museum

Tomintoul & Glenlivet Development Trust are in the process of taking over ownership of the Tomintoul hostel and the former Tomintoul museum from the Moray Council. The expected benefit to the community includes an increase in the number of bed nights available in Tomintoul leading to increased footfall in this rural location. The retention of the museum within the community formed a key part of the Trust's successful Heritage Lottery Fund Bid for £3.4 million. This building provides a community anchor location for a range of geographically spread projects aimed at restoring and promoting Tomintoul and Glenlivet's Hidden Heritage. Additional projects include the stabilisation of Blairfindy castle and an extension of the Speyside Way. The transfer of these assets from Moray Council will directly benefit the local economy with the focus on increasing Tomintoul as a visitor destination and the creation of 5 jobs locally. See related case study later in the review.



Speyside Way Visitor Centre

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 enhancing the visitor experience including updating and developing new/additional displays. The Association has been successful in utilising use of the buildings out with the tourist season with fixed term bookings.



Tomintoul Hostel and Museum

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 4 star Visitor 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 fulltime 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. The 2007-2013 programme was drawn to a close in 2014/15. During 2015/16 negotiations have been underway for the 2014-20 Programme. Moray TSi has been appointed by the Scottish Government as the lead body for the programme. Staff for the programme should be in place in the new year of 2017 with the programme inviting expressions of interest and considering applications by the summer

The main aim of LEADER is to increase the capacity of local rural community and business networks to build knowledge and skills, innovate and co-operate in order to tackle local development objectives.



European Fisheries Fund Axis 4

Since April 2012 Moray European Fisheries Fund (MEFF) Axis 4 programme has provided investment opportunities to the local fisheries community to create new and sustainable sources of income in the coastal area from Cullen to Burghead. The Moray Fisheries Local Action Group (FLAG) committee is made up of representatives from the coastal communities and public, private and voluntary sector organisations.

A programme closed in 2016 which saw many applications out of which 21 were successful; investing approximately £1.2 million into the local fisheries, aquaculture and tourism sector.



Projects ran from a joint seafood initiative lead by the Moray Firth Partnership, new and upgraded fishing heritage facilities in Burghead, Lossiemouth, Buckie; a remote underwater vehicle to a new small boat repair & sailing school in Cullen. For more details, please visit www.morayfisheriesfund.co.uk

A Highland and Moray FLAG has been established in 2016 for a new programme with communities being encouraged to apply for a share of £1 million pounds of European Funding to support the sustainable development of fisheries areas.

Case Study: Cluny Fish Ltd. – Ambient Seafood Development

Background

Cluny Fish is a small family business based in Buckie, Moray. It was established in 1969 primarily processing white fish. In 1972, their main line of work was curing Sprats and herrings for the Scandinavian market. During this time they mastered the art of lightly curing fresh Scottish salmon which they still do today using Rum or Scotch whisky along with oak fires. Cluny Fish is widely known in the EU market as they export to a number of countries.

Louis Paterson said, *“The aim of the project was to create a new sterilisation method which allows fresh seafood to reach longer shelf life. The European Fisheries Fund Axis 4 programme allowed us to create a method which was not available for companies in Moray. The application procedure was straightforward and lengthy although the support through the programme helped us to overcome any difficulties.”* The fund enabled us to deliver the project in a greater timescale, which would not have been possible without funding. The company has forward thinking plans to evolve sterilising in jars and cans different species of fish, and seafood in the near future which will be developed as time allows.”



Total project cost: £27,500.00

EFF awarded: £13,750.00

Result: 18 jobs have been created in fish processing

Case Study: Moray First Marine Ltd. Remotely Operated Vehicle (ROV) for range of marine inspections

Background

Moray First Marine (MFM) is a marine business with main activities being boats for various types of marine survey, and Remotely Operated Vehicles for subsea inspection.

ROV work varies from fish farm mooring and renewable device inspections to recovery of scientific and lost, large items of equipment from the seabed.

The company wished to offer an enhanced service by using their experience/ demand and also offer subsea inspections and equipment recovery. Funding through the European Fisheries Fund has helped secure additional work and employment from their previous projects.

The application procedure was relatively straightforward and excellent support was available from the FLAG administration when required.

Bill Ruck said, *"EFF enabled the company to offer this additional service which wouldn't have been possible otherwise. It has helped enhance the reputation of Moray First Marine and has allowed us to offer additional services. Our Future plans of the company is to start work including the Beatrice Offshore Wind Farm project once the go ahead is given, therefore offering a great local service"*

Total project cost: £131,077

EFF funding awarded: £51,157

**Result: New products/ideas developed:
Gained new contract in the fish farming sector
Number of jobs created: 1-2**



Future European Funding

The Economic Development team have been working on securing European funding for two projects.

An Employability Project described earlier in this report and a project to address poverty and social inclusion:

Poverty & Social Inclusion

A funding application was made to the European Social Fund, whereby Moray Council aims to run a 2 year debt advice project. The project will particularly target lone parents, people from low income households and people from workless households. The project would see a total of 800 participants receive advice and assistance with 720 gaining improved money management skills and 20 either gaining employment or a qualification. Approval of the European Funding application was received in December 2016.

Rural Action Plan for Moray – European Funding

This project was part-funded by the European Regional Development Fund. The capital build element of the project was completed in 2014/15 – this included 18,000 m² of new industrial units at Forres, Buckie, Keith and Elgin. By the end of March 2016 the project had created a total of 90 full time jobs within the newly created industrial units. The Council will continue to monitor the success of this project over the coming years.

Tomintoul and Glenlivet

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 Councils priorities including access to broadband and developing visitor destinations. Since 2012 Council funding has been used to provide support for projects including

improvements to the youth hostel and a broadband pilot scheme and for the employment of a Community Development Officer to support the Community 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, with music events, cycling event and partnering with the Spirit of Speyside Whisky Festival.

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 2018 to support implementation of the regeneration plan. The programme includes among other things projects to create an information hub for visitors at the former museum, improve access to heritage sites and the Speyside Way, conserve buildings at the former Scanlan seminary and Blairfindy Castle, restore rivers and burns to slow the flow of water, create and manage wetlands for wading birds, create education resources and training opportunities for young people, businesses and residents.



Case Study: Tomintoul and Glenlivet Regeneration Project

In December 2016 the project won the community led regeneration category of the Scottish Urban Regeneration Forum (SURF)

What is the aim of the project?

To support a rural area's socio-economic recovery by establishing a dedicated community organisation to identify and deliver appropriate regeneration responses.

What has been achieved?

The initiative began in 2010, following the closure of a number of key economic assets in the area such as the two main hotels in Tomintoul. A series of local consultations driven by local community and business leaders led the formation of a wide-reaching local regeneration strategy and the formation of Tomintoul and Glenlivet Development Trust in 2012 and a Landscape Partnership in 2013.

Just some of the many activities delivered under the project umbrella are:

- Developing a viable business plan to enable the reopening of a Visitor Information Centre and Museum in the village;
- Saving the local youth hostel – The Smugglers Hostel – from closure by taking it into community management;
- Supporting major improvements in signage and footpath quality to improve the visitor experience;
- Supporting major improvements in signage and footpath quality to improve the visitor experience;
- Providing a programme of festivals and gatherings to attract whisky, natural heritage, motorcycle, music and history enthusiasts;
- Establishing Glenlivet Mountain Bike Trails, which brought 12k visitors to the area in its first year of operation;
- Rolling out a successful community led broadband scheme.

This has all contributed to a greatly enhanced level of local tourism, embodied by the reopening of the two Tomintoul hotels that led to the project's genesis.

Who is running it?

Tomintoul and Glenlivet Development Trust, which has six directors and 320 members. Project partners include Cairngorms National Park Authority, Highlands & Islands Enterprise, the Heritage Lottery Fund, Moray Council, and the Crown Estate.

Why did the judging panel like it?

The judging panel were particularly impressed with the ambition and vision of the Development Trust, which has provided a strong foundation for success in reversing economic decline by simultaneously attracting more visitors to the area and creating local employment and volunteering opportunities. Over the years, the Trust has developed a well-earned reputation for managing resources, creating opportunities, and generally getting things done.

The panel were delighted to see that the Trust has found an ideal approach between community engagement and active agency support, with the 300+ community members clearly 'in charge' of strategy and drawing effectively on agency expertise and resources when needed. Many of the events and facilities developed will draw additional visitors to the area for many years to come, which will further help to build the skills and confidence of local people and continue the financial and social regeneration of the area.

Where can I find out more?

Development Trust Website: www.tgdt.org.uk

Contact: **Oliver Giles**, Development Officer,
Tomintoul and Glenlivet
Development Trust
Tel: 01807 580 358
Email: oliver@tgdt.org.uk



The Smugglers Hostel was reopened as a community owned asset in 2013



Tomintoul Museum reconstructs a village smithy

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.

At present, we are nearing completion of the refurbishment of four of our largest primary schools and in addition to this, work has started on a replacement secondary school for Elgin High School and early planning has started for the replacement Lossiemouth High School and a new primary school, Linkwood Primary is also being planned and has already been opened 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

A Prevention Working Group has been established by the Community Planning Partnership and has representatives from a number of partners. This group overseeing the development of locality profiles which will support us in developing a better understanding of the needs of our communities and this will be essential to future locality planning. A Prevention Day is being planned for partners in 2017 and the focus of the Prevention Working Group will shift towards developing a policy on poverty and social inclusion.

Population and Age Demographics

Moray has a relatively small population of around 96,000, ranking it the 7th smallest area in terms of population against all 32 Scottish local authorities. With a large geography and relatively small population it has a population density of 110 people/sq. mile. Between 2001 and 2015 the mid-year population estimates for Moray indicate a 10% increase over the period. Population growth in Moray has risen at a faster rate than both Scotland (6%) and comparable authorities (5%). 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 75. 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+ is growing faster than the rest of Scotland as a whole. Older people have a lot to contribute to their communities and there is a significant shift occurring in relation to this group being seen as contributors rather than focussing on the additional support some older people require. Life expectancy in Moray is above the national average and generally a longer period is spent in better health. Age demographics have been used in a number of research activities during the period to inform strategic planning.

Community Safety

The Community Safety Partnership continued its work to ensure Moray remains a safe place to live and do business.

The Community Safety Hub has enhanced its 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. Reductions have been recorded in relation to Noise Complaints, Rowdy Behaviour and Incidents of litter dropping and fly tipping.

Improved proactivity has seen a significant increase in Home and Fire Safety Visits many of which are now carried out jointly by relevant partners. Overall this seen improvements with less accidental fires and less casualties. Attendances at A&E as a result of accidents within the home have also reduced.



9 Natural and Historic Environment



Flood Risk Management

The year saw completion of the Elgin Flood Alleviation Scheme.

Moray's flood schemes protect Lhanbryde, Rothes, Forres and Elgin – over 1,000 homes and businesses. Nevertheless surface water flooding remains an issue and Dallas and Hopeman were flooded during Hurricane Bertha in 2014.

The Council is currently progressing flood protection schemes in Dallas, Hopeman and Portessie to reduce risk in these areas.

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 Newmill flood protection scheme, which is currently under construction. Five Surface Water Management Plans are being developed 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 of 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.

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.



ELGIN
C - A - R - S

Conservation Area Regeneration Scheme

The Elgin Conservation Area Regeneration Scheme, (CARS)

This 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 and Local Councillors. The progress so far is outlined below with a website for all the information at www.elgincars.org.uk

Elgin CARS Building repair grants: So far 27 grants have been awarded to date totalling £509,181. This contribution, combined with private investment of £614,677.46 will result in £1,123,957.59 of improvements being carried out to the historic building fabric of Elgin. The Building Health Check Scheme enabled 30 property owners to benefit from a free building survey and identified £887,260 of repairs work needed. The reports produced showed clearly which repairs were emergency, urgent and necessary. A tender is now being prepared to cost the work which is estimated to be in the region of £350,000. Work will commence in spring 2017.

Public Realm: Elgin CARS recently funded a study of 9 of the most used Closes and Lanes. This report is currently being used to encourage owners and tenants to collectively contribute to the suggested improvements with the remaining balance of funding coming from Elgin CARS.

Recommendations include improvements to hard surfacing, signage and lighting in addition to repair work. To view and download the report visit:

<http://elgincars.org.uk/2016/07/15/elgin-closes-report/>

Historic Shopfronts: Elgin has several Historic Shopfronts, one of which is of national importance. Burton's shopfront is a rare surviving example as discovered by Dr Lindsay Lennie (historic shopfront expert) who carried out a study of 20 shopfronts funded by Elgin CARS. Owners are being encouraged to apply for a CARS Shopfront Improvement grant to carry out the recommended conservation work. 4 shopfront grants have been awarded to date. To view the Shopfront Study visit: <http://elgincars.org.uk/2016/02/19/historic-shopfront-study/>

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.

The Keith Conservation Area Regeneration Scheme (CARS)

Keith CARS ran from April 2012 until March 2016. 14 different buildings were repaired at a total cost of around £1.3 million, CARS providing match funding worth £413,710 for these projects. 4 long-term empty shops and 8 long-term empty homes were brought back into use as a direct result of CARS building repair projects.



KEITH
C - A - R - S



Former Greigs building, Keith

Training schemes, education & awareness programmes in conjunction with Elgin CARS and community activity received grant funding of over £75,000 with over 900 people engaged through these activities. The training programme has enhanced the skills of 117 people working in the historic building field whilst 25 young people received basic stonemasonry training and a solid base from which to start an apprenticeship.

The 'Pop-Up Shop' project in the town has proved to be an extremely popular and successful method of attracting start up business to Mid Street and finding uses for empty retail spaces. Over 20 separate businesses have taken advantage of using the shop, 3 being successful enough to go on to open their own shops. The Pop-Up Shop is now run by the local community and has been supported by Moray Towns Partnership.

Thanks to elements of the scheme such as the re-branding of the town and the Pop-Up Shop initiative, 3 further long-term empty shops have been brought back into permanent use and at least 7 jobs have been created in the Conservation Area, helping Mid Street move from having one of the worst shop vacancy rates in Moray to one of the best. In total, the CARS and associated projects invested around £1.5 million into the Mid Street Conservation Area over the course of the scheme.

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 which have been identified and agreed by the Economic, Development & Infrastructure Committee to be implemented over a 12 month period.

Financial pressures set the context focusing on projects viewed as affordable and which could produce early tangible results. Twelve projects including lighting in the town centre, public access wifi and a review of the bus station layout. Unfortunately the lighting project was placed on hold as internal finances were redirected to higher priority areas. A number of projects did progress however, including the work to get vacant retail units back into occupation which continues, the car parking review which informed the Transport Strategy and is due to be reported on shortly and the streetscape review which is also ongoing. A bid for funding from the Regeneration Capital Fund for redesign of the exterior of Elgin Town Hall based on ideas generated in consultation with the local community, the Bus Station reconfiguration and public access wifi has reached the second stage of the application process. Additional funding opportunities are constantly reviewed to enable further projects to progress.



Public Design Charrette

Elgin Town Centre Action Plan/Re-use of Vacant ground and First Floor Buildings in Elgin Town Centre

Two of the Action Plan Projects agreed to be prioritised from the Elgin Charrette focus on Regeneration & Re-use of both vacant ground and first floor Buildings in Elgin Town Centre. The prime objection is to carry out an audit, work in partnership with the Elgin CARS Officer, Planning & Building Standards Officers, Elgin Bid, Owners and Tenants to actively facilitate the re-use of these assets which when occupied contribute positively to the vitality of the town centre. A Project Officer has been dedicated to leading this task for a 12 month period. The derelict building 184/188 High Street has been identified as a priority project and working in partnership with a local developer, development proposals are anticipated to be submitted in 2016.

An audit has taken place of the empty High Street properties and owners and tenants have been identified with the aim of supporting them to bring these assets back into use. Taking a co-ordinated and fully integrated approach, which includes all relevant

staff across departments, owners and tenants will be supported and assisted to overcome any barriers and challenges for their developments.

In tandem with a CARS grant towards exterior renovation, 3 residential units are currently being created by owners of High Street properties, which also incorporates refurbished ground floor retail space and additionally two developers are being supported in plans to refurbish their upper floors into residential accommodation with the potential for 3 to 5 units. Enquiries have also been made by a couple of developers and a housing based organisation looking to create a mixed residential and commercial development within the High Street Conservation Area. With support of CARS grant cottages at Victoria Close are being refurbished. A pop-up shop will soon be opened, which will bring a long-term empty High Street property into use. This will encourage footfall to an underused are of the High Street and offer some start-up businesses the opportunity to test-trade in a High Street location and hopefully, may give some of the occupants the confidence to take premises themselves in the future and establish their businesses in Elgin.



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.

Performance: The recycling rate for 2015/16 was 57.4% with Moray having the second highest recycling rate in Scotland. The current national average in Scotland is around 42%.

Satisfaction: Citizens Panel Surveys indicate that residents in the main are satisfied or very satisfied with the services provided of collection, street sweeping, recycling centres, public toilets.

Future Strategy: There are ongoing meetings/liaison with colleagues in Aberdeenshire and Aberdeen City with a view to progressing a joint Energy from Waste facility in Aberdeen to be operational in 2021/22 and procurement arrangements are now being developed. With a view to diverting more waste from landfill in the intervening period and to reducing eventual gate fees at the Joint Waste Facility, the Intervention Campaign is moving on apace. Following a successful play delivered to primary schools, an education pack which can be used in conjunction with the curriculum was issued to all schools. The message that we should all be recycling more continues to be pushed through a variety of media.

Plans for an upgraded waste facility at Moycoft, Elgin to future proof waste transfer facilities are progressing and are expected to be in place by 2018.

Energy and Climate Change

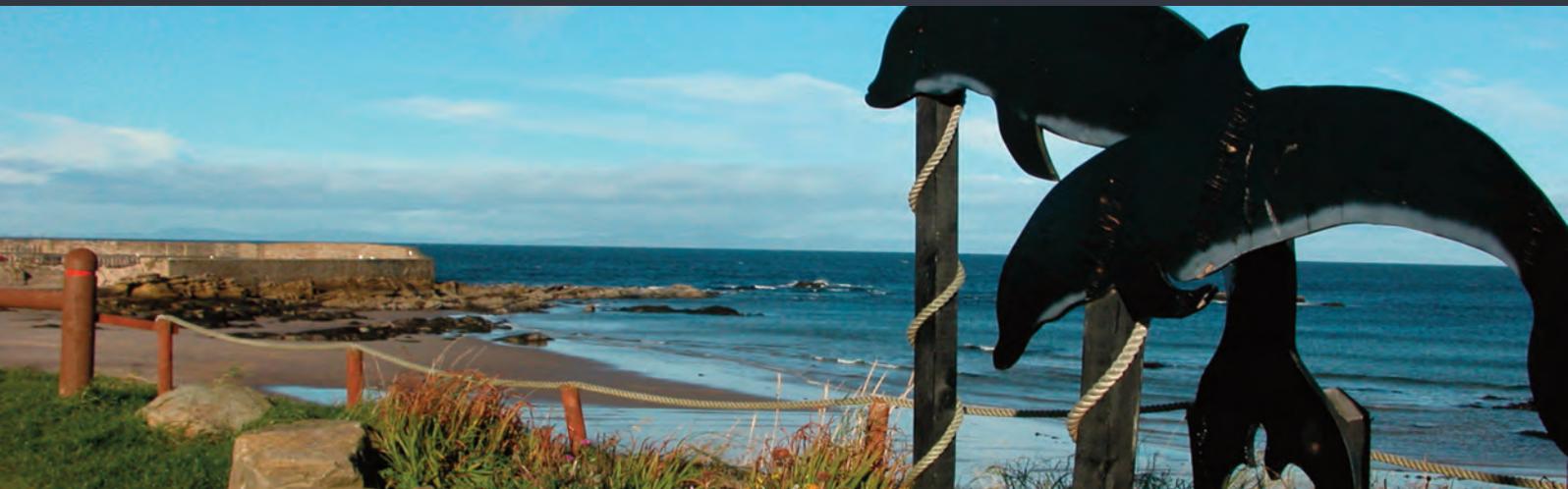
Within the recently adopted Moray Local Development Plan 2015, Climate Change is identified as one of the key policies. Since July 2015 all new developments of over 10 houses and buildings in excess of 500 sq. m have had to demonstrate actions taken to address climate change. Developers must evidence energy and resource efficiency, promotion of active travel and public transport, creation of quality green spaces and use of sustainable materials. In doing so, new development within Moray is actively contributing to reducing greenhouse gas emissions. Moray Council is working with Aberdeenshire, Aberdeen City and Angus to develop a strategic energy action plan (SEAP) for the North East of Scotland.

Cairngorms National Park

The southern area of Moray incorporating Glenlivet and Tomintoul are within the Cairngorms National Park. The Cairngorm Economic Strategy 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 diversification, and increasing the number of workers employed in the Park. The strategy is led by the Cairngorms Business Partnership, which is the business association for the area. Visitor surveys demonstrate a high level of satisfaction and appreciation for what the park has to offer. The park maintains a close working relationship with The Moray Council on planning matters, economic development and LEADER projects. There are a number of challenges for the park moving forward including the provision of affordable housing to help sustain local employment.

In the summer of 2016 the Park Authority held a consultation on The "Big 9" issues to help shape the next National Park Partnership Plan 2017-2022

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

A three year plan for developing cultural activities in Moray has been submitted to Creative Scotland and confirmation of £200,000 funding from Creative Scotland is expected before the end of the 2016 to be 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 Strategy for Tourism Development in Moray

Tourism generates over 10% of Moray's total employment and 3.8% of the total turnover of businesses. Visitor spending in Moray is in the region of £85m-90m per year. This compares with figures of £330m-335m for Argyll, and £300m for Aberdeenshire.

Prepared in 2013 under the auspices of the Moray Economic Partnership, the strategy was launched in March 2014. The vision is to:

- Double the economic value of tourism;
- 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 TOURISM

Moray Speyside Tourism

In April 2014,
MoraySpeyside Tourism
(MST), part of Moray
Chamber of Commerce,

was established and tasked by the Moray Economic Partnership with assisting the tourism industry in the Moray Speyside area to achieve the strategic vision for tourism, including a doubling of the economic value of tourism by 2025.

The economic impact of tourism increased from £94.63 M in 2013 to £105.76 M in 2015. A fall in the numbers of day visitors during this period has been more than offset by an increase in visitors staying overnight, particularly in serviced accommodation. At the same time as the economic impact has increased, the numbers of people employed in tourism has reduced, suggesting efficiency savings and consolidation by businesses in response to the state of the economy generally. The top activity of visitors is sightseeing; the top tourist attraction in 2015-16 by visitor numbers is the Scottish Dolphin Centre, Spey Bay with 92,835 visitors.

MST has put in place a marketing framework which looks to provide authentic experiences in cycling, food and drink, the coast, towns and villages, nature, history and heritage and includes initiatives to improve the customer journey with digital tourism, an integrated approach to visitor information and making tourism everybody's business. Focus is

placed on WorldHost customer service, preparing for accessible tourism, enhancing the golf tourism product and growing the business tourism product.

MST has fostered collaborative working relationships between business and organisations in Moray Speyside and elsewhere, for example participation by the five main towns in shared stand at VisitScotland Expo 2016. Further evidence of MST's achievements were reported to the Council's Planning and Economic Development Committee on 20th September.

Progress on marketing includes, raising the profile of Moray by attending the VisitScotland Expo, a successful application to the VisitScotland Growth Fund, enabling campaigns on Moray Speyside Larder, Cycle Moray Speyside the Draw of the Coast and a Forres Area marketing initiative. In particular MST redeveloped the morayspeyside.com web site in the autumn of 2015 to give a fresher, more modern appearance and updated content and material; adding a greater breadth and depth of content is an on-going process. Of note is the extraordinary success promoting Moray as the home of the real Macbeth on the back of the release of Justin Kurzel's movie Macbeth in 2015.

Going forward MST's ambition is to increase the volume and value of tourism to Moray. Plans are to move to a membership model in which industry colleagues invest – via membership fees, sponsorship and the purchase of advertising in the marketing and management of the Moray Speyside destination alongside ongoing public investment.



Museum Service

A full programme of events and activities both in the Museum and in partnership with many other heritage organisations across Moray, with local, national and international institutions, community groups and volunteers; and a wide range of enquiries has continued access to the collections and promotion of heritage and tourism in Moray.

The 2015 season, themed “Scots Safari”, celebrated Victorian pioneers, scientists and trophy hunters, and the objects from the original museum collection. Partnership working included Moray College Science Fair, Universal Hall, Findhorn, Camper Obscura, and the Festival of Museums with local Heritage groups. The opportunity to host the costumes from the StudioCanal film “Macbeth” along with Brodie Castle, Elgin Museum and Johnstons Cashmere brought a welcome boost to the end of the season’s visitor figures.

Full Accreditation with Museums Galleries Scotland was achieved and the Museum retained its 5 star Visitor Attraction status with VisitScotland for the fifth year. Visitor numbers to the Falconer Museum were very positive having increased by 80%. Increased virtual activity, via Facebook and the Friends of Falconer website, and increased indirect usage through resource loans to schools and groups and family events have been key factors. Involvement with events such as the World Orienteering Championships and Piping@Forres also attracted visitors to the Museum.

Membership of Moray Heritage Connections has increased with two more groups joining, and an updated leaflet was produced for the organisation.

The Castle to Cathedral to Cashmere heritage experience will bring over 1000 years of history to life through various mediums ranging from website with mobile technology, 3D interactive model, 3D high definition scanning, interpretation at over 25 sites, signage, animated light projection, public realm/access works to activity and events programme, involving more than 17 organisations with their volunteers - making Elgin & Moray a must see destination, engaging more people in their heritage.



The project started in 2015 & will be completed by the end of March 2017.

The project is aimed at visitors and the community with an emphasis to encourage younger people to engage in their heritage. The different levels of interpretation will provide an enjoyable experience and learning opportunity of the heritage for all, from those who would like just a snapshot, to people who would like in-depth information.

So far the activities involved over 12,000 visitors and involving over 100 volunteers. The interest alone in the Sword, Fire & Stone event showed over 26,000 hits and 24,000 for the video clip at Re-enactment Event Scotland. In addition to regular press releases, the recent STV town centre feature, the Castle to Cathedral to Cashmere has been also promoted in a recent Glasgow Herald Towns Centre supplement. It is planned to have an official launch of the Heritage Experience at the beginning of the next tourist season 2017.



Sword, Fire and Stone Event



Orienteering event, Roseisle

Laich of Moray

Partner organisations are developing the story of the Laich of Moray to celebrate the cultural landscape and exploit its visitor development potential.

Moray Film Liaison Service

Moray Film Liaison Service offers the film industry, free and confidential advice for visiting productions. This includes: information on locations and permissions; road closures etc. whether it's a feature film or a stills shoot.

In 2015-16 we have received approximately 150 enquiries regarding fashion shoots, car adverts, magazine features, with a number of production companies currently working on documentaries and television productions.

Events

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@Forres

On Saturday 27 June, 2015 Piping@Forres was held in Grant Park with over 20,000 spectators and over 100 pipe bands competing.

Word Orienteering Championships and Scottish 6-Days orienteering

From Friday 31 July to Saturday 8 August the 2015 IOF Word Orienteering Championships and the 20th edition of the Scottish 6-Days orienteering events was staged alongside each other in the Highlands and Moray. Together they comprised the largest orienteering event ever held in the UK and one of the largest sporting events to be held in Scotland in 2015. Up to 400 of the world's best orienteer athletes from 51 nations with Cameroon, Egypt, Nepal and Uganda attending a world Championships for the first time; exceed 6000 club orienteers and enthusiasts from all over the world, competing in both competitions.

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 has been developed for markets and events to take place in Elgin, Forres, Keith, Buckie and Lossiemouth.

In 2015-16 there were 20 markets, 15 events, 17 awareness campaigns and 2 charity collections throughout Moray.

The events included the Christmas Lights switch on, the Victorian Christmas Day, Elgin BID Easter Family Fun Day, Farmers Markets, and Elgin BID Scottish Theme Day. Elgin BID has recorded an increase in pedestrian numbers/shoppers on the Plainstones and town centre when events are taking place.



Piping@Forres

11 Priority Projects

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Promote improvements on the A95	pg 12
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Promotion of Tomintoul and Glenlivet Heritage project	pg 24

12 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.

Source	Indicator	2014	2015	% change
MC	Number of Building Warrant Applications	1092	986	-9.7
MC	Number of Planning Applications	789	718	-9.0
Registers of Scotland	Average House Price	£147,614	£152,668	3.4
Registers of Scotland	House Sales	1,771	1,700	-4.0
ONS	Number of Enterprises	3135	3190	1.8
ONS - mid year estimate	Population	94,750	95,510	0.8
ONS Nomis official labour market statistics	Gross Weekly Pay by workplace	£489.80	£491.80	0.4
ONS Nomis official labour market statistics	Gross Weekly Pay by residence	£491.10	£497.80	1.2
Annual Employment Survey (Nomis)	% workforce in private sector	77.2%	76.9%	-0.3%
Business Gateway	New businesses were supported to start-up with one-to-one advice	121	128	5.8
DWP	Job Seekers Allowance Claimants /March	925	1,120	21.1



Designed and produced by Development Plans

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