



The Moray Economic Strategy



October 2012

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Foreword

The Moray Economic Strategy has been produced by the Moray Community Planning Partnership to provide a long term economic diversification strategy for Moray.

This final version of the strategy has been the subject of extensive consultation and consideration by the Moray Community Planning Partnership, the Moray Economic Partnership, Scottish government and the Moray business and resident communities.

It combines the draft Moray Economic Strategy and Elgin - City For The Future documents, which were drawn up in the wake of the Strategic Defence Review, into a single Moray-wide strategy, including an Action Plan and Governance Structure.

The Action Plan is a dynamic document which will evolve over time. It is expected that as priorities and opportunities emerge and the needs of Moray alter over the next two decades, individual projects will be added, reprioritised and evolve.

The Moray Economic Strategy articulates the ambitions of Moray's community planning partners to achieve a strong, diverse and sustainable economy for the area, and a high quality of life and wellbeing for its residents.

We look forward to working with you to achieve its ambitions.

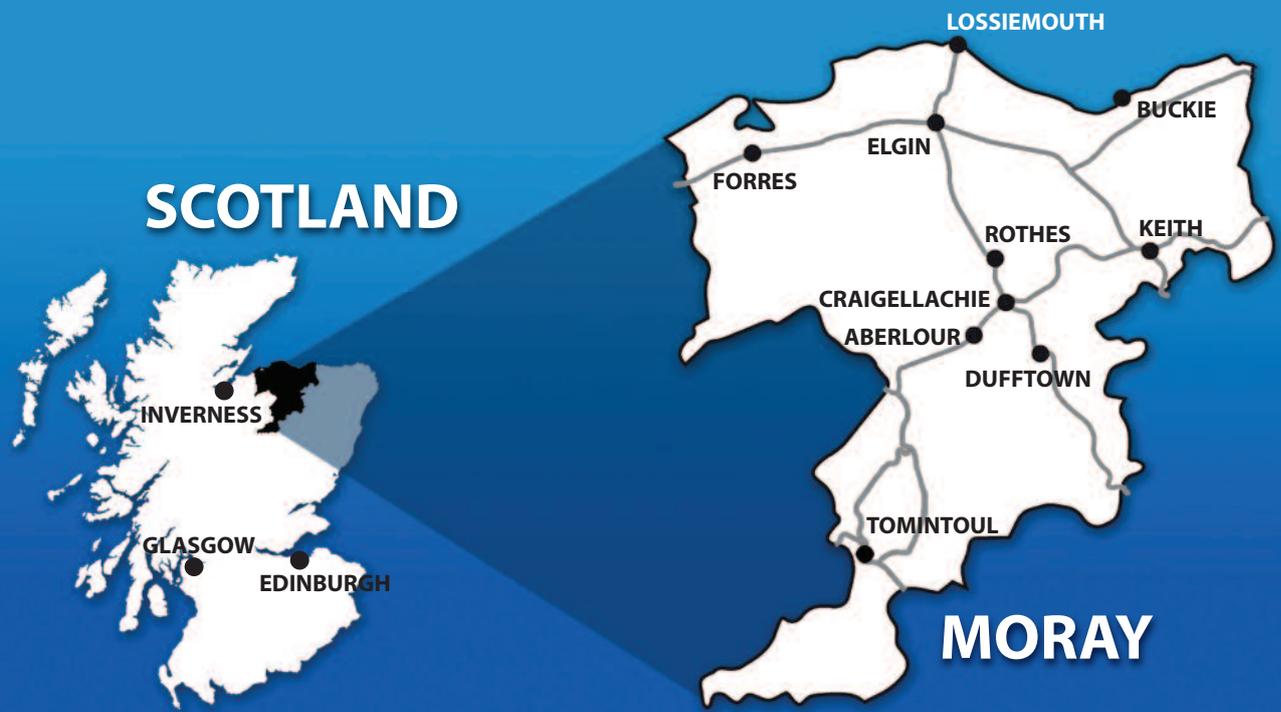


Allan Wright
Chair
The Moray Community
Planning Board



Jim Royan
Chair
The Moray
Economic Partnership

October 2012



Moray in Context

Moray is located between Aberdeen and Inverness in the north-east of Scotland and is connected to markets in the Central Belt and beyond by the A96 and A95 trunk roads and the Inverness-Aberdeen rail line. It also sits midway between the airports at Aberdeen and Inverness and has a cargo harbour at Buckie.

Moray's main centre of population and business is Elgin, which also has the area's main concentration of retail, commercial and leisure provision.

Economically, the relationship between Elgin and other main Moray towns (Forres, Keith, Buckie and Lossiemouth) and the rural area of Speyside is critical. There must be mutually supporting roles that complement the special attributes of each location and which enable a diverse economic base to be established serving all of Moray.

To varying degrees the four towns have their own catchments and have secondary retail, commercial and leisure functions. Moray's smaller towns and villages also have roles to play in the economic hierarchy, particularly in distilling and tourism in Speyside. Findhorn has developed a distinct role in promoting sustainable ways of living, arts and cultural activity.





The Challenges facing the Moray Economy

- Elgin is underperforming in its role as the primary engine of Moray's economy.
- Concentration in the food and drink sectors: while it comprises a strong manufacturing sector and some world leading brands, levels of pay are traditionally low.
- A high concentration of employment in the public sector, including defence.
- A relatively low proportion of graduates in the Moray workplace.
- The need for diversification into higher value economic sectors: despite high employment average wage levels lag 14% behind the rest of Scotland.
- Higher than average levels of economic activity, employment and self employment and low unemployment masked by high levels of outmigration, the population of young people is relatively low and almost three quarters of those brought up in the area leave, often for work or education opportunities elsewhere.
- The labour market is relatively tight: the availability of labour and appropriate skills are critical issues to businesses wishing to expand or locate in an area.
- Employment land availability is limited across all of Moray's key settlements, potentially constraining business expansion and inward investment.
- The visibility and value of Moray's tourism offer: while the appeal of the whisky sector and the area's landscape assets are clear, the sector underperforms. Other aspects of visitor infrastructure, accommodation, food, drink, retail, interpretation and other facilities need to be further developed to raise Moray's visitor profile.
- An increasing outflow of residents' retail and leisure spending to centres neighbouring Moray: investment in retail, leisure and civic infrastructure has not kept pace with Inverness and Aberdeen in particular.
- Perceived remoteness relative to the strategic road and rail network and key markets, and concerns over the capacity of broadband infrastructure.



Strengths and Opportunities

However, Moray has considerable strengths and opportunities with which it can begin to tackle these challenges through development of its key sectors;

- World renowned brands in food and drink – Walkers, Baxters, Speyside whisky and the individual distillers associated with it – as well as the Findhorn Foundation’s world-wide profile: the high level of recognition for Moray these afford in external markets can be exploited further.
- Significant natural and industrial tourism assets, and a location in Cairngorms National Park and close to Royal Deeside, provide a firm foundation for Moray tourism to develop as a high profile, high value sector.
- Enterprise Area status designated by The Scottish Government and the allocation of £9.5 million to develop supporting infrastructure for the Forres Enterprise Park; building on University status and the completion of the Moray Life Science Centre, Moray’s education and health resources form a platform for innovation across all of its key sectors. Moray can play a lead role in the development of Scotland’s E-health sector.
- The potential offered by the renewable energy and other sectors; as well as a coastal location, Moray benefits from established engineering capacity and expertise; it can support Scotland’s development of a world-leading and diversified renewable energy sector. Buckie harbour has particular potential as an operations and maintenance base to service the offshore windfarms to be constructed in the Moray Firth.
- Strong indigenous demand in the engineering and manufacturing sectors.
- A well established and developing social economy sector with high levels of engagement which can provide a resource to build capacity in service delivery and in product and service development in key sectors.
- A high quality of life, with access to high-quality amenities and landscape.
- A strong work ethic.
- The development of close relationships between the public sector and business.

The Strategy

Background

The background to the Moray Economic Strategy and Elgin - City for the Future Final Draft Reports and an outline of the engagement with the community which has influenced the development of the strategy is set out in Appendix 1 and 2. Community engagement will be an on-going feature of strategy implementation as part of the governance structure outlined on page 11.

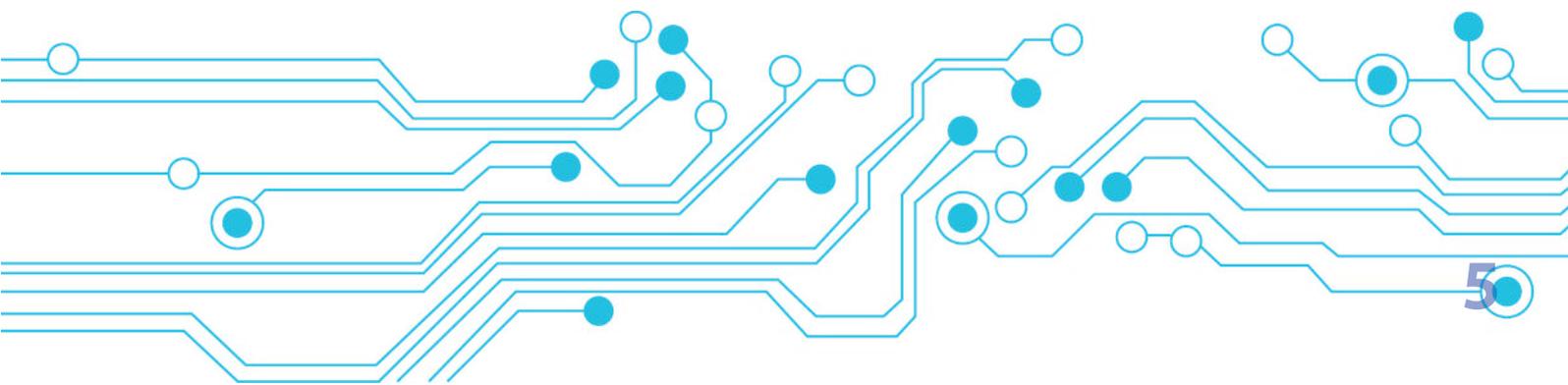
The Vision

The vision statements derived from business and community engagement workshops and subsequently incorporated in this strategy are:

Vision

Moray is a vibrant 21st century region with a broad business base providing stable well paid employment, and strong communities with a growing population, and

Elgin will define its role within the north east of Scotland to become a strong and vibrant economic hub of the Moray Region. It will attract investment and people because of its excellent health, education and retail services as well as improved connections, its unique environment and cultural and leisure offer. Key health and education services, including the Life Sciences Centre, will attract and develop skills which will reinforce Moray as a location for commercial health opportunities and world leading companies, while also providing a catalyst for broader business development, diversification and innovation. The City of Elgin will define itself as a compelling destination.



Core Targets

The Moray Economic Strategy adopts these core targets:

- Population – encouraging growth across Moray with the potential to grow to over 90,000 in the next 10 years, attracting new residents and people aged 16-25 years.
- Employment – the creation of over 5,000 jobs with a focus on high quality jobs in engineering and science and technology – coupled with an increase in employment in long established activities, such as tourism, and food and drink manufacturing. Job creation in the social enterprise sector is anticipated to increase.
- Earnings – implementation of the strategy aims to realise average earnings in Moray to, or above regional and Scottish averages by an emphasis on higher value activities.

Strategy Drivers

The strategy is structured around delivering actions under the five internationally recognised drivers of competitiveness which are:

People To achieve a stable and balanced population

Business To create sustainable economic growth

Infrastructure To build viable and improving services

Communities To create strong and confident communities

Identity To develop Moray's brand and presence

Both strategies have a focus on action and delivery. Actions to address the challenges and core targets are identified at various levels from the more general **Key Enabling Actions** to the more detailed projects, where timings and those partners responsible for their delivery are identified.

The **Key Enabling Actions** identified and detailed in the unified Action Plan under the five drivers of competitiveness comprise;

Encouraging Population Growth

Ease of Doing Business

Business Support

Improvements in Regional Accessibility

Developing the Social Economy

Developing Market Orientated Propositions for Inward Investment in Moray



The merged Action Plan is structured under five **Linked Themes** (as identified in Moray-wide strategy) and complementary five **Platforms for Change** (as identified in the Elgin plan).

The five **Linked Themes** under which the Action Plan was structured comprise:

Innovation in Business and Technology
Developing a High Profile, High Value Tourism Offer
Broadening and Developing the Economic Contribution of Moray's Education and Health Infrastructure
Developing Moray's Cultural Heritage and Arts Assets
Reinvigorating Moray's Retail, Leisure and Civic Sectors.

The Elgin – City For The Future part of the now unified strategy has three elements, 1. The Elgin Regeneration Model, 2. The City Masterplan and 3. The Action Plan.

1 The Elgin Regeneration Model is central to the strategy, and comprises the following components:

- At the core of the model is a mission statement, and the related **Vision**, (previously referred to). The mission is to achieve 'A sustainable economic model for Moray, based on an energised core city concept'.
- The model is built around the core requirements for Elgin to demonstrate regional leadership and to diversify its economic base. It stresses the importance of more assertive leadership amongst its leading stakeholders.
- Around these central components of leadership and diversification are a series of **Key Enabling Projects** - essential infrastructure projects without which Elgin cannot grow. These are: a full funding commitment to the Elgin Flood Alleviation Scheme; a series of improvements to the trunk road network; the update and re-design of Alexandra Road; and the delivery of new broadband infrastructure. With these projects laying the foundations for investment, five **Platforms for Change** have been identified.
- These areas of the economy, or platforms, will act as catalysts for future development and growth. They are interrelated, inter-dependent and overlapping. Furthermore, they are compatible with the five **Linked Themes** identified in the Moray Economic Strategy. The five **Platforms for Change** are:

Platform 1	'High Street First' – the health of central Elgin is positioned at the core of this strategy and it must remain the prime civic, retail, cultural and event space in Moray.
Platform 2	'Innovation in Technology and Business' – compared to other economies of its size Moray's weaknesses relate to an over reliance in sectors such as food and drink manufacturing and the public sector.
Platform 3	'Education and Health' – the presence of a dynamic and ambitious third level institution and regional teaching hospital in Elgin is a potent combination. There are major opportunities for shared research and development projects.
Platform 4	'The Visitor Economy' – tourism has been identified as an underperforming sector both for Elgin and Moray as a whole, and warrants specific attention.
Platform 5	'Arts, Culture and Heritage' – creative and cultural activity enhances a city's quality of place, shaping its identity in the face of increasing competition, and is a powerful vehicle for community development and engagement.

2 Elgin City Masterplan. The Masterplan aims to integrate Elgin’s economic performance more closely with that of the wider economy, and is consistent with the Moray Economic Strategy. It focuses on proposals for development to strengthen the city centre, so that in the longer term these can come forward in a structured way within Lossie Green. The Masterplan is informed and influenced by a detailed Transportation Study that modelled the impact of the proposed development projects. This was developed around a number of principles, including:

- Reduce the severance effect of the A96 Alexandra Road to allow good pedestrian and cycling connections between the High Street and the Lossie Green areas of the city centre.
- Create a new boulevard along the A96 Alexandra Road to provide a more urban feel with at grade pedestrian crossings corresponding with the principal pedestrian desire lines, the removal of a number of key pedestrian unfriendly roundabouts in the city centre and frontage development on both sides of the road.
- Other local road improvements to improve traffic flow between north and south Elgin and linked to development including the Edgar Road area.
- Building upon the Council’s Urban Freedom project the development of a safe and attractive network of walking and cycling networks with a focus on the green corridor following the River Lossie and the opportunities for enhancement opened up by the flood defence works.
- Relocation of the bus station to a new central location on Lossie Green as part of the development of a new civic square and to assist in the activation of the Lossie Green area of the city centre. Access to the new bus station will be from the A941 and Boroughbriggs.
- Promotion of sustainable travel patterns throughout Elgin by the development of an overarching Travel Plan with an emphasis on walking, cycling and public transport trips. The Travel Plan will address accessibility issues both within Elgin and across the region.
- The replacement of all car parking spaces lost to the Masterplan in a new multi-storey car park on Lossie Green accessed from the A941 and Boroughbriggs.
- Relocation of the lorry park on Lossie Green to the industrial areas to the east of the town accessed from the A96.
- Provision of a new centrally located coach drop off and pick up facility in addition to the existing facilities at Johnstons of Elgin.

3 The Elgin City Action Plan which specifies projects under each of the five **Platforms for Change** and identifies corresponding partners, and timescales for delivery. The new, combined Moray and Elgin Action Plan (see page 13-26) identifies timescales as: short – 2011 to 2015, medium – 2016 to 2021, and long – 2022 onwards.



Delivery of the Action Plan

Moray has not stood still while progressing the development of its new economic strategy and several projects related to the strategy have already taken significant steps forward. These include:

- Moray Life Science Centre, a partnership between Moray College UHI, HIE and NHS Grampian, under construction and due to open in summer 2013.
- Partnership working between HIE and Moray Council to deliver buildings and infrastructure funded by the Scottish Government following the designation of part of the Forres Enterprise Park on an Enterprise Area for Life Sciences.
- Processes put in place by Moray Council to assist SMEs and guide major planning applications.
- Partnership between Moray Council and HIE to facilitate the location of operations and maintenance for renewables at Buckie.
- Inward investment promoted by HIE, producing 50 jobs with ATOS and 150 jobs with Capita.
- Major private sector investments by Diageo, Baxters and Walkers.
- The development of a Lifelong Learning Strategy to co-ordinate the skills and training needs to support people into work.
- A series of focus groups led by the Moray Economic Partnership engaging key sectors of the business community.
- Preliminary work being undertaken by partners on the delivery of high speed broadband and to look at broadband opportunities for rural areas.
- Moray Council's additional investment in industrial and commercial estates.
- Consultants engaged to develop Elgin as a tourist destination.
- Town Centre Regeneration Schemes instigated for Keith, Elgin and Forres to improve retail frontages and upgrade the look of high streets.
- Two major flood prevention schemes being progressed to protect homes and businesses in Forres and Elgin.
- Roads infrastructure improvements in Elgin.
- Pilot project with HITRANS to move whisky from road to rail.



Prioritisation

Notwithstanding this progress, the Community Planning Partners acknowledge the need to develop a robust means by which projects identified in the Action Plan can be prioritised and delivered, and thereby remove any perception that the Moray Economic Strategy is merely a paper exercise – an accusation which has been made of previous initiatives.

Indeed, previous experience suggest that projects focussed on clearly identified problems with responses based on sound analysis and clearly articulated action plans will fail to realise their potential – unless they are accompanied by credible arrangements for delivery.

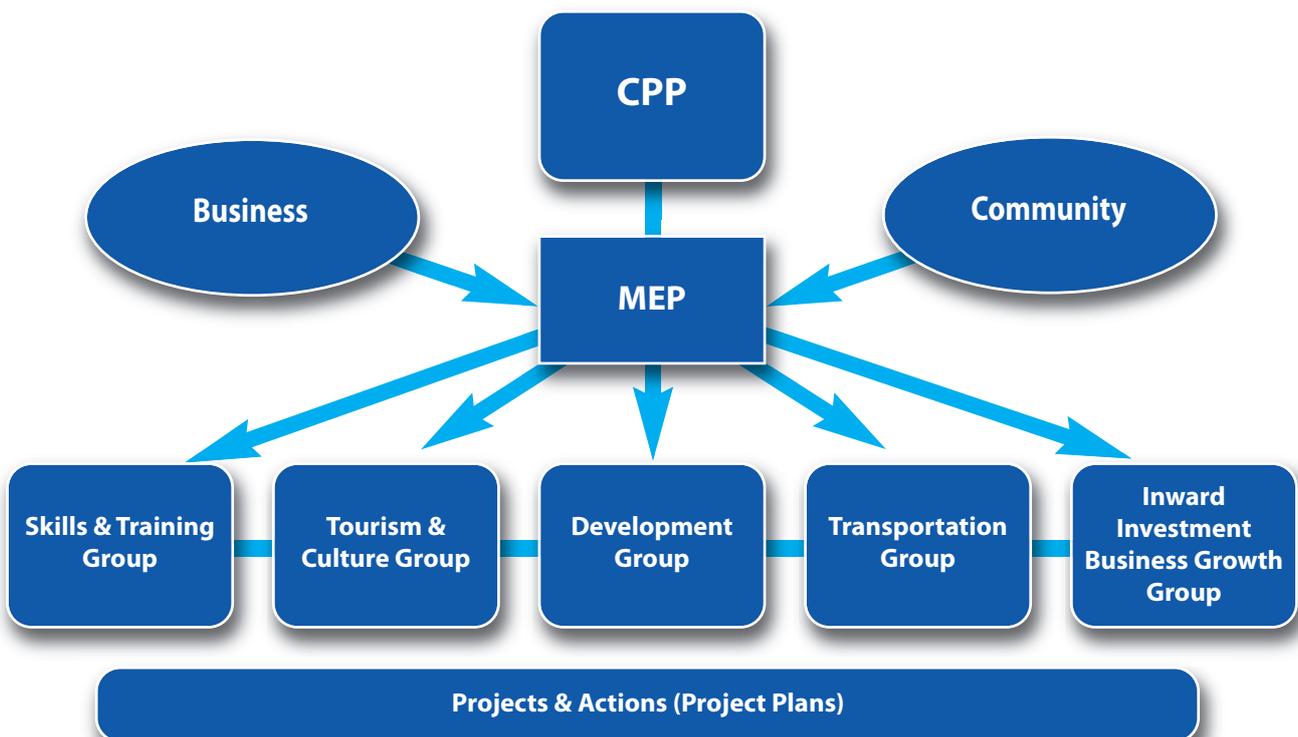
Essential elements for delivery

The following elements have been identified as essential for delivery:

- Long term, consistent vision.
- Strong, clear, sustainable leadership and governance.
- Strong communication links between public sector partners, communities and the private sector.
- Widely owned actions with clear accountability.
- A clear focus on existing strengths and opportunities.
- Wide ownership through effective engagement, facilitation, constant review and communication of progress.
- Agreed project prioritisation and
- Monitoring of delivery against goals.

Resources

It is recognised that delivery of the Action Plan will be dependent on the availability of resources and their prioritisation, and that it will evolve, adapting to changing circumstances and opportunities.



The Governance Structure

The delivery framework for the strategy was developed and tested at a workshop in June 2012, attended by delegates from partner organisations including The Scottish Government, The Moray Community Planning Partnership, The Moray Economic Partnership, Moray Chamber of Commerce, Federation of Small Businesses, Elgin Business Improvement District (BID), Business Gateway, Skills Development Scotland, Transport Scotland, VisitScotland, Jobcentre Plus, Scottish Development International, Moray Tourism Development, Cairngorms National Park and Forestry Commission.

The purpose of the workshop was to provide an opportunity for partners to consider how they could work together effectively to implement the Acton Plan, and the appropriate structure to lead, prioritise and manage implementation.

Key features of the structure

There was a clear consensus amongst the partners around a Governance Structure and the structure with the following six main fixtures was agreed by the Moray Community Planning Board in September 2012.

- The centrality of the Moray Community Planning Partnership (MCP) and the Moray Economic Partnership (MEP) with the MEP being accountable to the MCP for the implementation of the Moray Economic Strategy and Elgin – City For The Future unified Action Plan.
- The need for the MCP to be accountable to the wider community for implementation.
- The creation of Theme Groups to take forward action around specific topics. These would be accountable to the MEP, and ultimately to the Community Planning Partnership Board. The five themes identified were Tourism, Transport, Employability, Development, and Inward Investment.
- A partner organisation taking lead responsibility for each action – and nominating a member of staff to be the Key Lead for each project for which it was responsible.
- The need for a mechanism within the structure to ensure effective lateral communication between Theme Groups.
- Short, clear lines of accountability throughout the structure.

The Governance Structure is represented in this diagram.



The Way Forward

The main issues which will be addressed in detail and progressed in the context of the Governance Structure are:

- The priorities within and delivery of the Action Plan contained within this unified Moray Economic Strategy document.
- The indicators to be used to measure performance.
- A communication strategy to ensure continued engagement between partners and between the Partnership and the wider business and resident communities on matters such as progress on the development and implementation of the Action Plan.

It will also be appropriate to address the relevant provisions of the Strategic Environmental Assessment (Scotland) Act 2005

The nature, scale and urgency of action required demands a comprehensive approach to implementation, involving all of the Community Planning Partners working together with The Scottish Government, the defence sector, the business and resident communities of Moray, and other investment bodies nationally and internationally.

The Moray Economic Strategy and Action Plan for long term development and diversification of the Moray economy is an ambitious and far reaching initiative which presents The Moray Community Planning Partnership with the opportunity to make a significant, co-ordinated and proactive response to the challenges posed in recent years, and to build a strong, more resilient economy for the future.



ACTION PLAN ABBREVIATIONS

EBID	Elgin Business Improvement District
FSB	Federation Small Businesses
HEI	Higher Education Institutes
HIE	Highland and Islands Enterprise
MC	Moray Council
MCoC	Moray Chamber of Commerce
MSEN	Moray Social Enterprise Network
NHS	National Health Service Grampian
SDI	Scottish Development International
UHI	University of Highlands and Islands

Action Plan

The unified Action Plan provides details of the projects identified in both the Moray Economic Strategy and Elgin – City for the Future Final Draft Reports. It sets out the intended timescales and the partners involved in delivering projects.

The timescales are:

Short: 2011-2015

Medium: 2016-2021

Long: 2022 – onwards

The Action Plan does not represent firm commitment by partners and is aspirational, being dependent on availability of resources, including future funds which are not yet secured. The Action Plan will be reviewed regularly by the Community Planning Board to ensure prioritisation and progress. Resource detail will be included as it becomes available.

The actions and projects are colour coded for ease of reference to the Linked Themes/Platforms for Change. The numbering included in the Action Plan is for ease of reference and does not imply prioritisation.

Full details of the enabling actions and projects can be found in the Moray Economic Strategy Final Draft Report on page 13 in the section titled Repositioning Moray's Economy and in the Elgin City for the Future Part 2 Final Draft Report on page 21 in the section titled Key Enabling Projects. The documents can be accessed at www.moray.gov.uk

ENABLING ACTIONS/PROJECTS

Encouraging population growth (To build the population, particularly that of working age. Regional infrastructure to attract and retain people, appropriate and effective allocation of housing land and encouraging development of housing across a range of tenures).

Improvements in regional accessibility (Including broadband enhancement; A96, A95 and rail network improvement; critical road transport improvement; redesign of A96 at Alexandra Road; relocation of bus station; traffic distribution outside city centre; improved strategic connections; improvements to business park accessibility; and replacement dredging facility for harbours)

Developing market-orientated propositions for inward investment

Business Support (Skills development, and support for business to adapt to economic change)

Ease of doing business (Regulation including streamlined planning procedures)

Developing the Social Economy

The Elgin Flood Alleviation Scheme

INNOVATION IN BUSINESS AND TECHNOLOGY

Project	Timing/ Responsibility
<p>1 Promotion Of Barmuckity Business Park Barmuckity is a key resource to enable the expansion and relocation of local businesses, and attract new investment to Elgin. It could provide up to 30 ha of general industrial land.</p> <ul style="list-style-type: none"> • Completion of Flood Alleviation Scheme • Identify funding package • Finalise design guidance to ensure treatment of approaches reflects the sites location on the eastern gateway to Elgin. • Develop Site Marketing Strategy • Submission of subsequent planning applications for individual sites. • Processing of planning application • Site Servicing • Implementation 	<p>Short</p> <p>Private Sector, MC, HIE</p> <p>MC Private Sector, HIE, MC MC</p> <p>Private Sector Private Sector MC MC Private Sector</p>
<p>2 Elgin West Research & Innovation Park Phased development of high quality business floor space, should supply of business premises be needed, in partnership with the private sector. Building on the development of the Life Science Centre and the skills and expertise available at Dr Gray's and Moray College, suitable ancillary office and research space is required. The phased development of some 2,787 sq.m (30,000 sq.ft) of high quality business floor space in the west of Elgin proposes to do this. This is dependent on business provision elsewhere and the CPP partner's assessment of displacement and additionality.</p> <ul style="list-style-type: none"> • Site acquisition • Planning application submitted • Planning application processed • Park development 	<p>Medium</p> <p>Private Sector, HIE, NHS</p> <p>Private Sector, HIE Private Sector, HIE MC Private Sector</p>
<p>3 Buckie Quayside Provision Consolidation/rationalisation of underutilised harbourside buildings and disused railway sidings to provide space for exploiting offshore wind servicing potential.</p>	<p>Short</p> <p>MC,HIE,Private Sector</p>
<p>4 East Moray Science & Business Campus, Buckie Development of campus and business premises to support science-based departmental relocation, research and business development in renewable energy and low carbon sectors.</p>	<p>Short/Medium</p> <p>Private Sector, HIE, MC, MSEN</p>
<p>5 Promote Opportunities Promote opportunities for central area office provision to support business services development, and an appropriate range of high quality commercial services across Moray:</p> <ul style="list-style-type: none"> - Elgin 2,360 sq.m (town centre) - Forres 1,200 sq.m (serviced offices) - Buckie 700 sq.m (serviced offices) 	<p>Short/Medium</p> <p>Private Sector, MC,HIE</p>

Project	Timing/ Responsibility
<p>6 Industrial Estate Remodelling/ Refurbishment Expansion and relocation will leave existing industrial properties vacant. As businesses move to new space, this provides an opportunity to refurbish the vacated units to current standards, and to remodel units to the scale required by start ups and other businesses.</p> <ul style="list-style-type: none"> Develop and implement refurbishment remodelling programme 	<p>Short</p> <p>MC</p> <p>MC</p>
<p>7 Identification Of Expansion Land Development rates over the past 3 years have been steady. There is now an acute shortage of serviced land ready for development to meet the needs of existing businesses and prospective inward investment. There are current and anticipated requirements in Elgin for some 16 hectares. In addition to Barmuckity and Elgin West further allocations are required to ensure that major external inquiries or the potential expansion/relocation requirements of larger businesses in the area in the medium to long term can be met and economic activity and employment retained locally.</p> <p>Further allocations will be identified in the Moray Local Development Plan. Estimated requirements to 2025:</p> <ul style="list-style-type: none"> Elgin 25ha. Forres 10 ha. Buckie 3-5 ha. (quayside), 5 ha (March Rd & elsewhere) Identify future employment allocations through the Moray Local Development Plan process Indicate allocations in the Proposed Plan Plan adoption 	<p>Short</p> <p>MC, Private Sector</p> <p>MC</p> <p>MC</p> <p>MC</p>
<p>8 Course Development Course development supported by continual dialogue between Moray College staff and representatives of Moray's key business sectors to ensure education and training provision is closely tailored to business requirements:</p> <ul style="list-style-type: none"> Tourism and hospitality (standards, product & service development) Renewable Energy and low carbon sectors. 	<p>Short</p> <p>UHI, MCoC, MSEN,</p>
<p>9 Establish Business Development Support Unit Moray College provides courses in Arts, Business & Management, Care & Social Work, Hospitality, and Science & Technology (including engineering). In addition to their educational value, the skills and experience of its staff can be a useful resource for the local business community, both in providing advisory services and in assisting innovation in product and service development.</p> <p>The support unit would provide a brokering service between local industry and educational resources (which may also include the Scottish Agricultural Colleges Business Services Office and other UHI campuses), for assistance with product and service development audits, signposting to potential funding sources and assistance in developing funding applications. (Dundee's Innovation Portal provides a comparable example).</p> <ul style="list-style-type: none"> Identify collaborating HEIs Develop Support Unit Business Case (potential for SEEKIT and other grants) Establish Moray Business Development Support Unit 	<p>Short</p> <p>UHI, HIE, MSEN</p> <p>UHI, HIE, MSEN</p> <p>UHI, HIE, MSEN</p>

DEVELOPING A HIGH PROFILE, HIGH VALUE TOURISM OFFER

Project	Timing/ Responsibility
<p>1 Coordinated Events & Promotions Strategy Co-ordination of a Moray-wide programme of events is designed to increase footfall at all times of the year. While promoting a range of events, it would also involve co-ordination of retail, leisure and accommodation business to ensure marketing and promotions are consistent. The Strategy should identify emerging short and medium term opportunities as well as longer term objectives.</p> <p>2 Signature Visitor Facilities Development of high quality interpretive facilities featuring Moray's culture, history and heritage. These should be of an appropriate scale and based at 'gateway' locations or where their context dictates. The Strategy encourages concept development, feasibility and implementation for projects rooted in local heritage, including, for example:</p> <ul style="list-style-type: none"> - Story of Speyside Culture, Keith focusing on language, music, family culture (feasibility) - RAF Moray museum, telling the story of the RAF's involvement in the area - The Moray Story - It is proposed that Grant Lodge be redeveloped as appropriate and extended to accommodate a range of functions: a permanent exhibition telling the story of Moray's people, its way of life and its key industries, temporary displays; and the Council's archives (which are acknowledged to be of national importance) • Develop Moray Story concept • Grant Lodge Feasibility & Options Analysis, including: Legal factors, Current condition and risks, Restoration options, Expansion/redevelopment options, Funding sources • Design Moray Story Centre • Implementation <p>3 Assist Hotel Development Working with private sector operators and landowners, appropriate sites for high quality hotel development in Speyside and in Central Moray will be identified and marketing approaches developed as appropriate.</p>	<p>Short</p> <p>MTD Ltd, MC, HIE, Private Sector, MSEN</p> <p>Short/Medium</p> <p>MC,HIE, EBID, MTD Ltd, Local Community /Interest Groups, MSEN</p> <p><i>Partnership Management Group</i></p> <p><i>Partnership Management Group</i></p> <p><i>Partnership Management Group</i></p> <p><i>Partnership Management Group</i></p> <p>Short</p> <p>HIE, Private Sector, SDI,MC</p>

Project	Timing/ Responsibility
<p>4 Development & Promotion Of Linking Infrastructure Developing Moray’s ‘linking’ infrastructure, including designated tourist routes and walking and cycle routes etc will help in developing Moray as a comprehensive visitor destination, while accessing particular visitor markets and encouraging exploration of different aspects of the area and its heritage. This includes Moray-wide initiatives and projects which aim to encourage links within individual Moray settlements:</p> <ul style="list-style-type: none"> - Moray Way: promotion of the 95-mile Moray Way (combining the parts of the Dava, Speyside and Moray Coastal Trails) - A Castle to Cathedral heritage trail will be developed in Elgin as a central and currently missing component of the tourism infrastructure, encouraging visitors to explore the links from Ladyhill through the High Street to the Cathedral. An external loop from the Cathedral through Cooper Park would complete the circuit. This would be accompanied by interpretation, signage and promotion events - Development of heritage trails in Speyside towns 	<p>Short/Medium/Long</p> <p>MC , MTD Ltd, EBID, Local & Interest Groups</p>
<p>5 Incremental Infrastructure Improvements A programme of small scale infrastructure improvements developed to assist continued maintenance and repair of existing infrastructure:</p> <ul style="list-style-type: none"> - e.g. Seatown Bridge, Lossiemouth 	<p>Short/Medium</p> <p>MC, Local Trusts, MTD Ltd</p>
<p>6 Visitor Orientation Provision of clear arrival and information points, located to improve visitor access to heritage facilities and other attractions, food and drink, retail and leisure facilities. It includes development of suitably located car and coach parking facilities.</p> <ul style="list-style-type: none"> - Potential Visitor Information Centre relocation (potentially including reuse of existing landmark buildings) Elgin, Forres - Coach drop off facilities Elgin, Keith, Forres 	<p>Short/Medium</p> <p>MC, HIE, Visit Scotland, MTD Ltd</p>
<p>7 Business Development Support To Hoteliers/ Restaurateurs The accommodation sector in Central Moray is structured to meet business and contractor demand. Business development support, including marketing, and business development advice will be developed to assist restructuring for the tourist and visitor economy:</p> <ul style="list-style-type: none"> • Development of support packages (including identification of available business development funding and eligibility criteria) 	<p>Short/Medium</p> <p>Business Gateway, UHI, MC, MTD Ltd, MSEN</p> <p><i>Business Gateway, MC</i></p>

BROADENING AND DEEPENING THE ECONOMIC CONTRIBUTION OF MORAY'S EDUCATION AND HEALTH INFRASTRUCTURE

Project	Timing/ Responsibility
<p>1 Completion Of Moray Life Science Centre Moray Life Science Centre is a joint Moray College/NHS Grampian/HIE initiative. It will become a key research, education and continuing professional development facility for the Life Science sector in the North East of Scotland and will be housed in a new building on the Moray College Campus. In addition to space to accommodate the College's Health and Social Care faculty and NHS Grampian's Clinical Skills Unit, commercial space will be available for related SMEs. Conference and meeting facilities will also be accommodated in it.</p> <p>Additional research activities and commercialisation will be introduced to increase knowledge transfer with local companies. Remote and digital healthcare based on research and development being carried out by Moray clinicians is the initial focus of research activity.</p> <p>The development of Moray College's Life Science Centre, the particular expertise of senior medical staff at Dr. Gray's, and the availability of comprehensive information at population level of the health of Moray residents presents a clear opportunity for Elgin to develop its position as a focus of health-related research. The combination of research and new facilities will help attract and retain key staff in the area.</p> <p>Funding is committed by key partners and a Design Team has been appointed.</p> <ul style="list-style-type: none"> • Construction of Life Science Centre has commenced with completion due by summer 2013. 	<p>Short</p> <p>UHI, NHS ,HIE, MC</p>
<p>2 Promotion Of Specialist Research Chairs Specialist Research Chairs will be supported to embed E-Health/digital health care research in Elgin and raise the prospects for attracting related companies to commercialise and apply related opportunities. These chairs should be supported by UHI specialist researchers.</p> <ul style="list-style-type: none"> • Working with the private sector, establish Digital/E-Health Research group • Establish Chairs in Medical Web Science, Consumer Health Psychology and Mobile Health Technology with research support 	<p>Short</p> <p>NHS, HIE, UHI, Private sector</p> <p><i>UHI, Private Sector</i></p> <p><i>UHI, Private Sector</i></p>
<p>3 Develop A Moray Marketing Proposition To Digital Health Sector Develop and market a Moray/Elgin package of skills, academic facilities, demographic characteristics, and availability of related research and business premises to healthcare companies to encourage their development/location in Elgin/Moray.</p> <ul style="list-style-type: none"> • Develop Moray's Health-related investment proposition,(skills, resources, premises, support) • Develop & implement related Marketing Strategy (target markets/companies) 	<p>Short</p> <p>HIE,SDI,NHS</p> <p><i>HIE, SDI</i></p> <p><i>HIE, SDI</i></p>

Project	Timing/ Responsibility
<p>4 Moray College Campus Redevelopment Campus redevelopment will enable the College to provide a range of courses and facilities building on University status. It will assist staff recruitment and the extension of advisory and research capacity. Support for business case submission and development in the medium to long term.</p> <ul style="list-style-type: none"> Refine & submit Business Case to reflect RAF rationalisation in Moray. (Accompanied by a strategy to influence Government Ministers and key decision makers) Campus redevelopment 	<p>Short/Medium/Long</p> <p>UHI, HIE,MC,NHS</p> <p><i>UHI</i></p> <p><i>UHI</i></p>
<p>5 Dr Gray’s Hospital Redevelopment Ongoing support for business case and development in medium to long term.</p> <p>NHS Grampian has been preparing a masterplan for Dr Gray’s. Redevelopment which will provide a modern, high quality medical service provision and research environment. It will also address access and parking issues and capitalise on partnership projects located nearby.</p> <ul style="list-style-type: none"> Complete redevelopment masterplan, incorporating economic and business case (linked to economic impact and health research) Pursue prioritisation in NHS Grampian Capital Plan Hospital redevelopment 	<p>Short/Medium/Long</p> <p>NHS, MC,UHI,</p> <p><i>NHS</i></p> <p><i>MC, NHS</i></p> <p><i>NHS</i></p>
<p>6 Serviced Residential Accommodation Accommodation is required to meet Dr Gray’s staff requirements (trainee doctors and medical staff) and for those moving to Moray to study. To be provided in central Elgin. While there may be opportunities for joint provision, NHS and College requirements may dictate separate provision. There is an immediate requirement for some 50-75 spaces (the NHS requirement is for up to 30). As Moray College develops its University status, this is expected to increase in the medium to long term. This needs to be taken into account when developing solutions. As appropriate, the potential for reuse of former Council properties should be considered. Long lease arrangements and security of a long term income stream are needed to attract the private sector to develop this accommodation.</p> <ul style="list-style-type: none"> Specify accommodation criteria (location, scale, cost) Prepare and issue market brief Select preferred development partner Agreed Heads of Terms Submission and processing of planning application Develop accommodation for immediate needs Plan for medium to long term requirements 	<p>Short</p> <p>UHI, NHS,MC, private sector</p> <p><i>UHI, NHS</i></p> <p><i>UHI, NHS</i></p> <p><i>UHI, NHS</i></p> <p><i>UHI, NHS, Private Sector</i></p> <p><i>Private Sector, MC</i></p> <p><i>Private Sector</i></p> <p><i>UHI, NHS</i></p>
<p>7 Innovation Networking Establishment of forums bringing business, education and key stakeholders together to discuss new approaches to business development and sustainability.</p>	<p>Short</p> <p>MCoC, Findhorn Foundation, HIE, MC,MSEN</p>

DEVELOPING MORAY'S CULTURAL, HERITAGE AND ARTS ASSETS

Project	Timing/ Responsibility
<p>1 A New Arts School/Centre</p> <p>An expanded Arts School would enhance Moray College's profile also supporting arts-based activity across Moray. To include theatre, performance, and exhibition space, as well as artists studios. (Central Moray/Elgin)</p> <p>It would complement the work of the Findhorn Foundation. Such a facility should be centrally located to bolster Elgin's role as a focus for arts and heritage activity. Feasibility work should be undertaken in tandem with analysis of Town Hall feasibility options as there is clear co-location potential.</p> <ul style="list-style-type: none"> • Detailed assessment of Arts School/Arts Centre requirements, including facilities and floorspace. Location options to include Town Hall co-location • Preparation of Business Case (dependent on findings of assessment) • Funding submissions • Implementation (linked to Campus redevelopment) 	<p>Medium/Long</p> <p>UHI, MC , Findhorn Foundation, HIE, MSEN</p> <p><i>UHI</i></p> <p><i>UHI</i></p> <p><i>UHI</i></p> <p><i>UHI</i></p>
<p>2 Regional Sports Facility</p> <p>Developing the area's sports infrastructure will broaden the area's cultural profile, while also improving its links to tourism related to outdoor recreation. Development of a regional sports facility for Moray will help develop Elgin as a focal point, complementing existing leisure centre provision. It will also assist in Moray College's efforts to attract students from further afield as well as providing accommodation for its developing programme of sports and fitness courses.</p> <ul style="list-style-type: none"> • Implementation (linked to available budgets and consistent with Moray Council Capital Programme) 	<p>Medium/Long</p> <p>MC, UHI</p> <p><i>MC,UHI</i></p>

ELGIN HIGH STREET FIRST

Project	Timing/ Responsibility
<p>1 Improved Regional Public Transport Links</p> <p>Improved links to central Elgin from other parts of Moray will support its key retail, leisure, civic, administrative and employment role. Maintenance of a comprehensive public transport network - servicing both peak hour and leisure time requirements - will also enhance Elgin's 'Gateway' role to the rest of Moray. Proposed service enhancements will require liaison with businesses in the city centre's retail, leisure and other sectors.</p> <ul style="list-style-type: none"> • Develop Elgin-wide Travel Plan; implement service improvements 	<p>Short</p> <p>MC, Transport Operators</p> <p><i>MC, Transport Operators</i></p>
<p>2 Bus Station Relocation</p> <p>An improved, relocated bus station is needed in the City Centre. Relocation is needed to support consolidation and improvement of the St Giles Centre. The preferred area for its relocation is Lossie Green, ultimately as part of a new civic square. Parking spaces will be reprovided elsewhere in the Masterplan area.</p> <ul style="list-style-type: none"> • Commission Bus Station design, (including options review) • Relocate car parking • Procure bus station redevelopment 	<p>Short</p> <p>MC, Transport Operators</p> <p><i>MC / Transport Operators</i></p>
<p>3 Moray College/UHI Teaching Restaurant</p> <p>Moray College has established strengths in hospitality and leisure. It has an existing restaurant facility located on the campus. This would be relocated (or supplemented) in a centrally located property in Elgin providing operational, management as well as hospitality training in a 'real world' context.</p> <ul style="list-style-type: none"> • Develop and agree training restaurant concept and operating model • Identify appropriate premises (with a preference for sites in Moray Council's portfolio) • Agree lease arrangements, fit out and commence operation 	<p>Short</p> <p>UHI, Moray Council, EBID</p> <p><i>UHI</i></p> <p><i>UHI</i></p> <p><i>UHI</i></p>
<p>4 St Giles Church As The Centre Piece Of High Street Activity/Relocation Of Elgin Visitor Information Centre</p> <p>St Giles Church is the most dominant building in the High Street, although it is increasingly under-used. Its re-use as Elgin's main visitor information centre and/or an events venue would help to attract and better orientate visitors to explore the High Street and neighbouring areas. This can only be done with the agreement of the congregation and the Church of Scotland. There has been a religious presence on the site for some 800 years, which in itself may provide the basis of a related exhibition.</p> <ul style="list-style-type: none"> • Discussions with Church of Scotland/congregation on acceptability of reuse • Liaison with Historic Scotland • Agree use specification • Design & Implementation 	<p>Short</p> <p>MC, Church of Scotland</p> <p><i>MC, Church of Scotland (CofS)</i></p> <p><i>MC</i></p> <p><i>CoS</i></p> <p><i>MC, CoS</i></p>

Project	Timing/ Responsibility
<p>5 A High Street Pavilion As A Showcase For Change</p> <p>A temporary building with innovative design would be constructed and prominently positioned in the High Street. This would provide both a showcase for progress in implementing the Masterplan and as a temporary exhibition space. Opportunities to fund this privately should be explored.</p> <ul style="list-style-type: none"> • Agree temporary use of space • Prepare detailed concept and activity brief • Identify potential sources of funding • Commission Design Competition • Implementation 	<p>Short</p> <p>MC, Private Sector</p> <p>MC</p> <p>MC</p> <p>MC</p> <p>MC, Private Sector</p> <p>MC, Private Sector</p>
<p>6 Townscape Heritage Improvements</p> <p>Elgin has a strong character of historic townscape and buildings and its central street pattern, High Street and Little Cross have a unique identity. This is accompanied by high quality civic and institutional buildings. These features should be maintained and where possible enhanced to make the centre an increasingly attractive place to come to, use and spend time and money.</p> <ul style="list-style-type: none"> • Prepare prioritised rolling programme of key buildings and related improvements (costed) • Implement improvements 	<p>Short</p> <p>MC, EBID</p> <p>MC, EBID</p> <p>MC, EBID</p>
<p>7 Physical Extension Of St Giles Centre</p> <p>The St Giles Centre is a key retail space, the city centres only covered mall provision and prime retail area. The extension of the St Giles Centre to the north and west (and possibly back towards the High Street could make a further 7,300 sq.m. (76,600 sq.ft) available for retail/leisure-led mixed use development, albeit a smaller extension may prove more viable in the current economic/property climate.</p> <ul style="list-style-type: none"> • Prepare development brief for extended site (acknowledging requirement for bus station relocation) • Broker site assembly discussions with landowners • Agreed Heads of Terms for consolidated site • Site assembly • Planning application for mixed use development • Implementation 	<p>Short/Medium</p> <p>MC, Private Sector</p> <p>MC</p> <p>MC</p> <p>Private Sector</p> <p>Private Sector</p> <p>MC, Private Sector</p> <p>Private Sector</p>
<p>8 Southern A96 frontage consolidation</p> <p>Marks & Spencer's High Street store anchors the western end of the High Street. The area fronting the A96 also houses leisure and office uses. From the A96 this area presents a fragmented unattractive aspect. There is scope to introduce new activity here, reinforcing Elgin city centre's retail and leisure offer. A96 frontage consolidation could realise retail/leisure led mixed use development of 3,716 sq.m. (40,000 sq.ft). Potentially, this would enable an M&S expansion, along with an extended leisure offer, without compromising car parking levels in this area. The site could be developed in individual parcels or as part of a combined development.</p> <ul style="list-style-type: none"> • Prepare development brief for extended site • Broker site assembly discussions with landowners • Operator discussions re potential requirements • Agreed Heads of Terms for consolidated site • Site assembly • Planning application for mixed use development • Implementation 	<p>Short</p> <p>MC, Private Sector, EBID</p> <p>MC</p> <p>MC</p> <p>Private Sector</p> <p>Private Sector</p> <p>Private Sector</p> <p>Private Sector, MC</p> <p>Private Sector</p>

Project	Timing/ Responsibility
<p>9 High Street East</p> <p>The limited availability of potential retail development opportunities in the centre of Elgin extends in equal measure to hotels. The Masterplan findings indicate a shortage of good quality accommodation in Elgin in both business and leisure sectors. A centrally located hotel would support the development of Elgin’s night time economy and potentially attract increased levels of expenditure to it. A site at North Port has been identified with High Street frontage and opposite the Moray Council buildings.</p> <ul style="list-style-type: none"> • Prepare development brief • Operator discussions re potential requirements/ involvement • Broker site assembly discussions with landowners • Draft Heads of Terms for consolidated site • Site assembly • Planning application for mixed use development • Implementation 	<p>Short</p> <p>MC, Private Sector</p> <p>MC Private Sector MC Private Sector Private Sector Private Sector, MC Private Sector</p>
<p>10 Town Hall Feasibility Assessment</p> <p>The required strategy for the future of this building should acknowledge the scale and nature of the building’s usage (existing and potential); increasing maintenance costs and the likelihood that this will continue; the potential benefits and costs of relocation and redevelopment; and community views on its future. The Town Hall occupies a strategic frontage site. Whether it remains as it is, is redeveloped in situ, or is relocated to a new building, will have a critical bearing on the response of developers to the opportunities the rest of the site offers once flood alleviation works are completed (anticipated 2014). Clarity over the Town Hall’s future is needed to prepare a meaningful Development Brief that the market will respond to.</p> <ul style="list-style-type: none"> • Detailed assessment of Town Hall condition, maintenance costs and implications and options for future provision of Town Hall functions • Consultation and decision on preferred option 	<p>Short</p> <p>MC</p> <p>MC MC</p>
<p>11 Lossie Green Development Brief</p> <p>Once a decision has been taken on the future use of the Town Hall site, the flood alleviation works are close to completion and other activity is underway in the centre of Elgin this can be addressed. The availability of expansion space for the city centre is key for Elgin going forward. Having this land, adjacent to the existing High Street area will greatly assist the future direction of development of Elgin in the longer term.</p> <ul style="list-style-type: none"> • Undertaking of site investigations to include contamination analysis • Preparation of Development Brief (involving neighbouring occupiers/owners) • Marketing of development opportunity for extension of town centre uses and identification of development partner/funder • Agreed Heads of Terms • Submission of planning application • Processing of planning application 	<p>Short/Medium</p> <p>MC, Private Sector</p> <p>MC, Private Sector MC Private Sector MC</p>

Project	Timing/ Responsibility
<p>12 A96 North Development Brief/To East of A941</p> <p>The range of potential development mixes is linked to the findings of feasibility assessments for the Town Hall and the Arts Centre.</p> <ul style="list-style-type: none"> • Preparation of Development Brief (involving neighbouring occupiers/owners) • If appropriate, marketing of opportunity for appropriate uses and identification of development partner. Otherwise business case submissions for civic and related uses • Submission of planning application • Processing of planning application 	<p>Short/Medium</p> <p>Private Sector, MC, UHI</p> <p><i>MC, Private Sector</i></p> <p><i>MC</i></p> <p><i>Private Sector, MC, UHI</i></p> <p><i>MC</i></p>
<p>13 Alexandra Road Improvements</p> <p>The replacement of a number of roundabout junctions on Alexandra Road with traffic signals and the introduction of at grade pedestrian crossings. Associated with this the widening of Alexandra Road between the Tesco and A941 junctions. The provision of shared foot/cycle ways along the north side of Alexandra Road and a footway to the south. Public realm improvements to create a boulevard along Alexandra Road.</p> <ul style="list-style-type: none"> • Scheme Design • Land Assembly • Construction 	<p>Short</p> <p>Transport Scotland</p> <p><i>Transport Scotland</i></p>
<p>14 Lossie Green Multi-storey Car Park</p> <p>The provision of a new multi-storey car park on Lossie Green to replace the existing car parking and to accommodate the Masterplan. Access from the A941 and Boroughbriggs.</p> <ul style="list-style-type: none"> • Planning and Design 	<p>Short</p> <p>Private Sector</p> <p><i>Private Sector</i></p>
<p>15 Replacement Lorry Park</p> <p>The long term plans for Lossie Green will require a replacement and purpose built lorry park to the east of the town.</p> <ul style="list-style-type: none"> • Land assembly, design & construction 	<p>Short</p> <p>MC</p> <p><i>MC</i></p>
<p>16 Elgin Destination Strategy</p> <p>There is a very specific requirement to establish a bespoke destination strategy for Elgin. A strategy that is targeted at altering the current dynamic for the visitor economy, challenging the status quo (which is not working for Elgin) and addressing a complacency about visitors and the untapped potential of Elgin as a compelling destination. A new approach is needed that gathers all stakeholders around a refreshed and integrated strategy for city promotion with new thinking around key elements such as product development and product innovation, heritage appreciation, the welcome experience, the evening economy offer and the synergies with the development of local arts and culture activity.</p>	<p>Short</p> <p>MTD Ltd, MC</p>

Project	Timing/ Responsibility
<p>17 Visitor Management Strategy</p> <p>As a sister strategy to the Elgin Destination Strategy above, this will concentrate on developing: clear arrival and information points which showcase the full range of Elgin’s developing tourism offer; path and other infrastructure to guide visitors around Elgin and its attraction and points of interest; and co-ordinated information on facilities, accommodation and events. It will also develop well-located parking facilities for car and coach-borne visitors.</p>	<p>Short</p> <p>MTD Ltd, MC</p>
<p>18 City Centre Coach Drop Off & Pick-Up Facility</p> <p>New facilities would be provided central to the High Street, providing easy access to relocated visitor information services and the proposed High Street pavilion.</p>	<p>Short</p> <p>MC</p>
<p>19 City Centre Lighting Strategy</p> <p>Key buildings and spaces will be illuminated to highlight attractive features in the city centre to encourage visitors and residents to make use of the area in the evening.</p> <ul style="list-style-type: none"> • Prepare Lighting programme, identifying priority buildings and spaces • Implementation 	<p>Short</p> <p>EBID, MC</p> <p><i>EBID, MC</i></p> <p><i>EBID, MC</i></p>
<p>20 Events & Promotions Strategy</p> <p>Build on existing events in the Food and Drink and other specialist sectors and seek to extend the range (in focus and size). It would be designed to increase footfall at all times of the year. While promoting a range of events, it would also involve co-ordination of retail, leisure and accommodation business to ensure marketing and promotions are consistent. The Events & Promotions Strategy should identify emerging short and medium term opportunities as well as longer term objectives.</p> <ul style="list-style-type: none"> • Develop Events and Promotion Strategy • Develop integrated approach to Retail Markets including farmers’ markets. Quality produce and goods should be emphasised, reinforced by strong management and enforcement. A programme of themed speciality markets should be co-ordinated with regular market provision. <p>In addition a loyalty card system should be further developed to attract retail and leisure customers to make greater use of the town centre and undertake return visits.</p>	<p>Short</p> <p>EBID</p> <p><i>EBID</i></p> <p><i>EBID</i></p>

APPENDIX 1

Background to development of the strategy

THE MORAY ECONOMIC STRATEGY AND ELGIN – CITY FOR THE FUTURE FINAL DRAFT REPORTS

These documents can be accessed at www.moray.gov.uk

The Elgin – City For The Future (ECFTF) project was commissioned by the Moray Community Planning Partnership (MCCP) in order to provide an economic regeneration strategy for Elgin and in particular Elgin city centre. As the primary economic engine of Moray a performing city centre is an essential component for sustaining wider economic well being.

The MCCP also recognised that there were considerable risks attached to a lack of co-ordination of their development projects. Conversely, it was acknowledged that there were benefits to the partnership if their programmes could be co-ordinated, and that efficiencies and opportunities could be obtained from such an approach.

As a result, a steering group was established to manage the Elgin-City for the Future project, comprising officers of The Moray Council, Highlands and Islands Enterprise, Moray College/UHI, NHS Grampian, and reporting to the Community Planning Board. In turn, the steering group engaged a multidisciplinary team of consultants to work up a plan for Elgin and the Elgin-City for the Future project formally began in June 2010.

By October 2010, the MCCP recognised that the existing Moray 2020 economic strategy required to be replaced, and that whilst the outcome of the Strategic Defence and Security Review would have significant implications for the future of RAF Kinloss and RAF Lossiemouth - and consequently for Moray's economy - a Moray economic strategy would also have to address the wider challenges in other areas.

A consultancy team was commissioned in February 2011 to undertake this work by the Community Planning Board, and supervised by a steering group comprising officers of The Moray Council and Highlands and Islands Enterprise.

As a large part of the background analysis (in terms of the performance of economic sectors and the issues they face) had already been undertaken by the Elgin-City for the Future project, the team started with established working relationships with key businesses and other stakeholders, and it was relatively straightforward to augment the process by extending consultations and workshops into other parts of Moray.

It was acknowledged at the time that whilst commissioned separately and at different times, both the Elgin and wider Moray projects needed to be consistent and complementary, and to be aligned in terms of wider public engagement and delivery.

This strategic approach by The Moray Community Planning Partnership has allowed The Moray Economic Strategy to merge with that of Elgin-City for the Future and remain current and relevant.

APPENDIX 2

COMMUNITY ENGAGEMENT

In June 2011, the Moray Community Planning Partnership Board recognised that these economic strategy proposals should be subject to wider community engagement.

The public were invited to make their views known at a series of presentations and workshops held at Elgin, Aberlour, Buckie, Fochabers, Forres, Keith and Lossiemouth during September 2011. The public was also able to take part in the engagement on-line via the Moray Council website, and by post. There were in excess of 1300 hits on the website. The public engagement provided in excess of 1,150 comments.

Responses to the public engagement were divided into the following sections; (A) General Comments; (B) Business and Technology; (C) Tourism; (D) Education and Health; (E) Arts and Culture; (F) Retail and Leisure; (G) Roads, Rail, Air links; (H) Agriculture and Forestry. (The sections on Agricultural and Forestry, and Road, Rail and Air links were added in response to comments made by some workshop participants). Inevitably, there is a degree of overlap in the themes raised in the engagement, whereby they are relevant to more than one heading.

These headings were in the main compatible with those identified in The Moray Economic Strategy and Elgin–City for the Future documents, and formed the basis for the various levels of actions included in the Action Plans of both documents.

In summarising the extensive overview of responses, it should be emphasised that this has been based on the identification of recurring themes, rather than a simple numerical analysis. Furthermore, it is not implied that those points not highlighted will be ignored, but rather they have less emphasis or strategic significance. Flexibility to respond to changing circumstances has been built into the Moray Economic Strategy.

The detailed responses to the community engagement exercises will be held on a website to be created shortly in support of the Moray Economic Partnership's communication strategy.

Conclusion

At the presentations given during the Community Engagement Workshops, it was emphasised to participants that the Community Planning Partnership was determined to ensure that all stakeholders were given the opportunity to contribute to the development of the strategies.

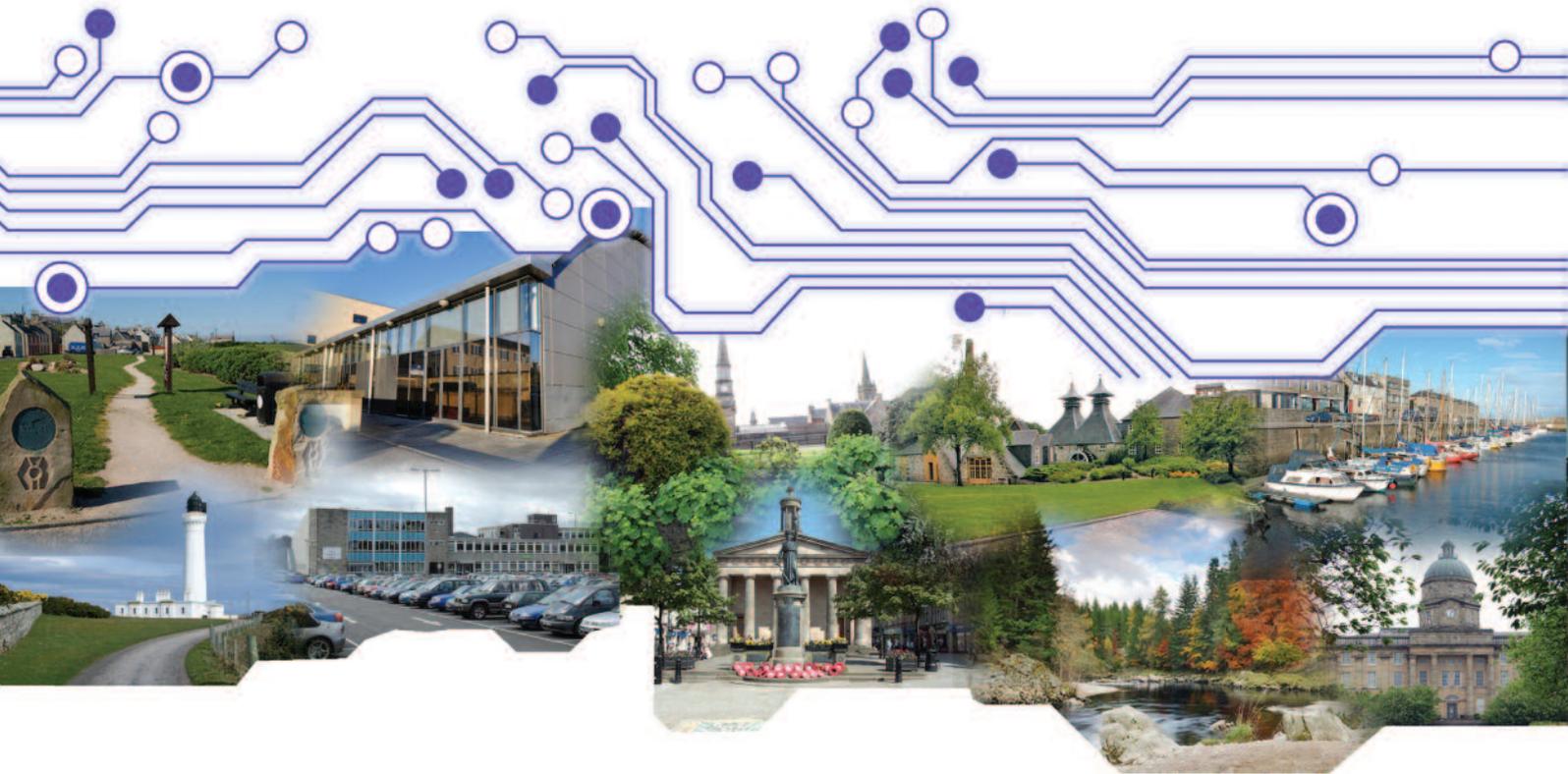
There was a general agreement amongst participants:

- that they had an opportunity to contribute
- on the analysis of Moray's economic weaknesses and the need to diversify the economy, with Elgin playing a central role, in conjunction with the other towns and rural areas, all of which have roles to play
- that the Action Plans should identify priorities for delivery, and that progress on delivery should be monitored and communicated to the public
- that integrated, collaborative, partnership working, together with long term political support was required, with delivery through the Community Planning Partnership, and the strategic priorities being aligned to those of The Scottish Government

Key Themes

- The development of life sciences and renewable energy, investment in broadband
- The need to align the supply of employment land and premises with the needs of business and industry
- The need to diversify indigenous industries such as agriculture and forestry and develop established sectors such as engineering
- The need for greater co-ordination of tourist attractions and improvements in hotel accommodation
- That a high quality education system was central to retaining and attracting younger age groups, who are seen as having a key role in the future of Moray
- The need to align the provision of courses, graduate placements, apprenticeships and training to the needs of business and industry
- The recognition of the economic benefits to be derived from the development of the arts, heritage and culture
- The acknowledgement that Elgin city centre is the most important economic space in Moray, whilst also accepting the need to promote the vitality and viability of other town centres and to tackle leakage of expenditure from Moray
- The need to improve the transport infrastructure and public transport services for greater connectivity within Moray and to external markets.

A few respondents questioned the proposed timing and commercial viability of certain aspects of the strategy, particularly redeveloping the Lossie Green area of Elgin. However, the strategy and action plan are designed to look to the long term and should promote high aspirations for Elgin's regeneration.



Designed and produced by The Moray Council on behalf of The Moray Community Planning Partnership

The MCPP would like to thank all the photographers who contributed to this publication, in particular those supplied by Highlands and Islands Enterprise and Tim Winterburn.”