

# Finance, Economy and Corporate Services Scrutiny Committee – Blended Meeting



Committee Room 2, 5th Floor, Fife House, North Street,  
Glenrothes

Thursday, 18 April, 2024 - 10.00 a.m.

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## AGENDA

### Page Nos.

1. **APOLOGIES FOR ABSENCE**
2. **DECLARATIONS OF INTEREST** – In terms of Section 5 of the Code of Conduct Members of the Committee are asked to declare any interest(s) in particular items on the agenda and the nature of the interest(s) at this stage.
3. **MINUTE** – Minute of the meeting of Finance, Economy & Corporate Services Scrutiny Committee of 25 January 2024 3 – 7
4. **CHANGE IN MEMBERSHIP** – Committee to note that Councillor Gary Holt replaces Councillor Eugene Clarke as a member of this scrutiny committee.
5. **EDINBURGH AND SOUTH EAST OF SCOTLAND CITY REGION DEAL ANNUAL REPORT 2022/23 AND UPDATE ON THE BENEFITS REALISATION PLAN FOR THE FIFE INDUSTRIAL INNOVATION INVESTMENT (I3) PROGRAMME.** – Report by the Head of Business & Employability 8 – 82
6. **TAY CITIES DEAL ANNUAL REPORT AND BENEFITS REALISATION PLAN** – Report by the Head of Business & Employability 83 – 243
7. **2023/24 REVENUE MONITORING PROJECTED OUTTURN – PLANNING SERVICE, BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director - Finance & Corporate Services and the Executive Director - Place 244 – 246
8. **2023/24 CAPITAL MONITORING PROJECTED OUTTURN – BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director Finance & Corporate Services and the Executive Director - Place 247 – 252
9. **2023/24 REVENUE MONITORING PROJECTED OUTTURN – FINANCE AND CORPORATE SERVICES** – Report by the Executive Director - Finance & Corporate Services 253 – 257
10. **2023/24 CAPITAL MONITORING PROJECTED OUTTURN – FINANCE AND CORPORATE SERVICES DIRECTORATE** – Report by the Executive Director - Finance & Corporate Services 258 – 262
11. **FINANCE, ECONOMY & CORPORATE SERVICES FORWARD WORK PROGRAMME** – Report by the Executive Director - Finance & Corporate Services 263 – 267

**Members are reminded that should they have queries on the detail of a report they should, where possible, contact the report authors in advance of the meeting to seek clarification.**

Lindsay Thomson  
Head of Legal and Democratic Services  
Finance and Corporate Services

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11 April, 2024

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### **BLENDED MEETING NOTICE**

This is a formal meeting of the Committee and the required standards of behaviour and discussion are the same as in a face to face meeting. Unless otherwise agreed, Standing Orders will apply to the proceedings and the terms of the Councillors' Code of Conduct will apply in the normal way

For those members who have joined the meeting remotely, if they need to leave the meeting for any reason, they should use the Meeting Chat to advise of this. If a member loses their connection during the meeting, they should make every effort to rejoin the meeting but, if this is not possible, the Committee Officer will note their absence for the remainder of the meeting. If a member must leave the meeting due to a declaration of interest, they should remain out of the meeting until invited back in by the Committee Officer.

If a member wishes to ask a question, speak on any item or move a motion or amendment, they should indicate this by raising their hand at the appropriate time and will then be invited to speak. Those joining remotely should use the "Raise hand" function in Teams.

All decisions taken during this meeting, will be done so by means of a Roll Call vote.

Where items are for noting or where there has been no dissent or contrary view expressed during any debate, either verbally or by the member indicating they wish to speak, the Convener will assume the matter has been agreed.

There will be a short break in proceedings after approximately 90 minutes.

Members joining remotely are reminded to have cameras switched on during meetings and mute microphones when not speaking. During any breaks or adjournments please switch cameras off.

**THE FIFE COUNCIL - FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE – BLENDED MEETING**

**Committee Room 2, 5th Floor, Fife House, North Street, Glenrothes**

**25 January, 2024**

**10.00 am – 12.45 pm**

**PRESENT:** Councillors Allan Knox (Convener), Alistair Bain, Auxi Barrera, Ian Cameron, Rod Cavanagh, Eugene Clarke, Colin Davidson, Graeme Downie, Stefan Hoggan-Radu, Louise Kennedy-Dalby (substituting for Councillor Ann Verner), Robin Lawson, James Leslie, Gordon Pryde and Alistair Suttie.

**ATTENDING:** Eileen Rowand, Executive Director, Finance and Corporate Services; Pamela Stevenson, Enterprise and Business Development Manager, Business and Employability Service; Pam Ewen, Head of Planning, Alastair Hamilton, Service Manager Development Management, Planning Service; Heather Honeyman, Assessor; Charlie Anderson, Head of Business Technology Solutions, Martin Kotlewski, Service Manager - Solutions and Service Assurance, Business Technology Solutions; Elaine Muir, Head of Finance, Donna Grieve, Accountant, Jackie Johnstone, Accountant, Finance and Corporate Services; Sharon McKenzie, Head of Human Resources, Human Resources Service; Les Robertson, Head of Revenue and Commercial Services, Revenue and Commercial Services; Caroline Macdonald, Service Manager - Category Management, Derek Hamilton, Category Manager, Procurement; Lindsay Thomson, Head of Legal and Democratic Services, Helena Couperwhite, Service Manager - Committee Services and Michelle Hyslop, Committee Officer, Committee Services, Legal and Democratic Services.

**80. DECLARATIONS OF INTEREST**

No declarations of interest were submitted in terms of Standing Order No. 22.

**81. MINUTE**

- (i) Minute of the Finance, Economy and Corporate Services Scrutiny Committee of 26 October 2023.

**Decision**

The committee agreed to approve the minute.

- (ii) The following minute was submitted for noting:-

- Budget Scrutiny Working Group of 25 October, 2023.

**Decision**

The minute was noted.

**82. PLANNING PERFORMANCE FRAMEWORK 12 (2022-2023): SCOTTISH MINISTER'S FEEDBACK**

The committee considered a report by the Head of Planning Services providing an update on the performance of the planning authority as set out in the Planning Performance Framework (PPF) 12, for the period 2022/23. The report also outlined the feedback that was received from the Scottish Government.

**Decision**

The committee scrutinised and provided feedback on the performance of the planning authority as set out in the Planning Performance Framework (PPF) 12.

**83. BUSINESS GATEWAY FIFE ANNUAL PERFORMANCE**

The committee considered a report by the Head of Business & Employability providing an annual overview of the performance of Business Gateway Fife Ltd in delivering services during the period April 2022 to March 2023 including the council's financial assistance to businesses scheme. The report outlined information on performance and highlighted areas of service adjustments to assist in the transition from European (EU) Funding to UK Shared Prosperity Funding.

**Decision**

The committee: -

- (1) noted the performance, expenditure and activity information for Business Gateway Fife in 2022/23;
- (2) noted the repositioned delivery focus theme of Leading Economic Recovery in supporting Fife businesses;
- (3) acknowledged the transition of EU Funding to UK Shared Prosperity Funding from 1st April 2023; and
- (4) agreed that a briefing would be issued to members with updated information when a decision had been made on the outcome of the Business Loans Scotland Strategy.

*Councillor Alistair Suttie joined the meeting during consideration of the above item.*

**84. ANNUAL PROCUREMENT REPORT 2022-23**

The committee considered a report by the Head of Revenue and Commercial Services providing a summary of Procurement activity and its impact during the financial year 2022/2023.

**Decision**

The committee: -

- (1) noted the Annual Procurement Report, detailed in Appendix 1 to the report, which would be published online and notified to Scottish Ministers; and

- (2) agreed that officers would prepare a briefing note for members providing updated information on the annual value report.

**85. ETHICAL PROCUREMENT**

The committee considered a report by the Head of Revenue and Commercial Services providing information on how Corporate Procurement, and those with Delegated Procurement Authority (DPA), addressed the requirements of Ethical Procurement. The report focussed on the ethics of prospective/existing suppliers rather than the ethics of procurement staff/activity, although this was touched upon as part of the evaluation process, noting that organisational ethics, including involvement in procurement activity, was incorporated in the Employee Code of Conduct.

**Decision**

The committee: -

- (1) noted the activity taken by the procurement functions and acknowledged that additional due diligence and investigations would be undertaken on a case to case basis as and when required; and
- (2) considered the potential opportunities for continuous improvement as detailed in Section 4 of the report.

**86. FINANCE & CORPORATE SERVICES' DIRECTORATE PERFORMANCE REPORT**

The committee considered a report by the Executive Director - Finance and Corporate Services presenting the 2022/23 performance scorecard for the Finance and Corporate Services' Directorate.

**Decision**

The committee noted:-

- (1) the arrangements set out in Section 1.0, to fulfil the council's obligation to comply with Audit Scotland's 2021 SPI Direction; and
- (2) the Finance and Corporate Services' Directorate performance information and the Key Performance Indicators as detailed in Appendix 1 to the report.

*The meeting adjourned at 11.30 am and reconvened at 11.45 am.*

**87. 2023/24 REVENUE MONITORING PROJECTED OUTTURN – PLANNING SERVICE, BUSINESS AND EMPLOYABILITY SERVICE**

The committee considered a joint report by the Executive Director - Finance and Corporate Services and the Executive Director – Place providing an update on the projected outturn financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee.

**Decision**

## 2024 FECSS 32

The committee noted the current financial performance and activity detailed in the report.

### **88. 2023/24 CAPITAL MONITORING PROJECTED OUTTURN – BUSINESS AND EMPLOYABILITY SERVICE**

The committee considered a joint report by the Executive Director - Finance and Corporate Services and the Executive Director - Place providing an update on the Capital Investment Plan and advising on the projected financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee.

#### **Decision**

The committee noted the current financial performance and activity as detailed in the report.

### **89. 2023/24 REVENUE MONITORING PROJECTED OUTTURN – FINANCE AND CORPORATE SERVICES**

The committee considered a report by the Executive Director - Finance and Corporate Services providing an update on the projected outturn financial position for 2023/24 for the Finance and Corporate Services Directorate.

#### **Decision**

The committee noted the current financial performance and activity as detailed in the report.

### **90. 2023/24 CAPITAL MONITORING PROJECTED OUTTURN – FINANCE AND CORPORATE SERVICES DIRECTORATE**

The committee considered a report by the Executive Director (Finance and Corporate Services) providing an update on the Capital Investment Plan and advising on the projected financial position for the 2023/24 financial year for the Finance and Corporate Services Directorate.

#### **Decision**

The committee noted the current financial performance and activity as detailed in the report.

### **91. FINANCE, ECONOMY & CORPORATE SERVICES FORWARD WORK PROGRAMME**

The committee considered a report by the Executive Director (Finance and Corporate Services) outlining a draft workplan for future meetings of this committee.

#### **Decision**

The committee:

- (1) noted the current Finance, Economy and Corporate Services Scrutiny Work Plan;

## 2024 FECSS 33

- (2) agreed that the absence and wellbeing interim progress report scheduled for 18 April 2024 would be moved to 13 June 2024 meeting; and
- (3) asked that consideration be given to identify an additional meeting in 2024 to avoid undue delay in consideration of committee business.

*The committee resolved, under Section 50(A)(4) of the Local Government (Scotland) Act 1973, as amended, to exclude the public and press from the meeting for the following items of business on the grounds that they involved the likely disclosure of exempt information as defined in Part 6 and 14 of Schedule 7A of the Act.*

### 92. FORTH GREEN FREEPORT – DELIVERY ARRANGEMENTS

The committee considered a report by the Head of Business and Employability outlining the relevant devolved fiscal incentives that are to apply within the proposed Forth Green Freeport (FGFP). The report summarised the investment incentives available, the expected Non-Domestic Rates Relief granted and the subsequent Rates Retention income for re-investment in place led economic development and subsidy control requirements.

#### **Decision**

The committee noted and commented on the key early actions for Fife Council in relation to developing:

- (1) a Forth Green Freeport (FGFP) non-domestic rate retention methodology including the proposed development of like-minded local economic development place led investment projects within inner and outer boundary of Forth Green Freeports; and
- (2) an in-principle approach to subsidy control funding requirements for relevant Forth Green Freeport projects including projects that would be funded from the reinvestment of NDR retention and the proposed Forth Green Freeport seed projects in Fife. This would occur as part of consistent practice and procedure agreed across other Forth Green Freeport Local Authorities and in line with Forth Green Freeport governance.

### 93. COUNCIL'S PREPAREDNESS TO DEAL WITH ISSUES AROUND RANSOMWARE

The committee considered a report by the Head of Business Technology Solutions which outlined the council's existing arrangements and planned improvements to minimise the risk of an attack on the council following a number of high-profile cyber-attacks across the public sector.

#### **Decision**

The committee noted the existing controls and improvements being made to manage the threat of ransomware attacks.

18 April 2024

Agenda Item No. 05

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## **Edinburgh and South East of Scotland City Region Deal Annual Report 2022/23 and update on the Benefits Realisation Plan for the Fife Industrial Innovation Investment (i3) Programme.**

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**Report by:** Gordon Mole, Head of Business & Employability Services

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**Wards Affected:** 1-15, 21,22

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### **Purpose**

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This report provides the annual update on the Benefits Realisation Plan for the Fife Industrial Innovation Investment (i3) Programme, funded through the Edinburgh and South East Scotland City Region Deal. It also presents the City Region Deal Annual Report 2022/23.

### **Recommendation(s)**

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Members are requested to:

- Scrutinise the performance of the Fife i3 Programme and the Edinburgh and South East Scotland City Region Deal Annual Report 2022/23 and provide feedback.

### **Resource Implications**

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None.

### **Legal & Risk Implications**

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There are no legal and risk implications from this Report.

### **Impact Assessment**

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An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery and policy.

The Fairer Scotland Duty, which came into force on 1 April 2018, requires the Council to consider how it can reduce inequalities of outcome caused by socio-economic disadvantage when making strategic decisions. The Benefits Realisation Plan details outcomes achieved in supporting inclusive growth associated with capital investment projects funded by the Edinburgh and South East of Scotland City Region Deal.



The Heads of Finance and Legal Services have been consulted in the preparation of this report. Wider consultation is not required as this report does not propose a change to existing policies and practices.

## 1.0 Background

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- 1.1 It is now almost six years since the Edinburgh and South East Scotland (ESES) City Region Deal was signed. It continues to make excellent progress in delivering the £1.4 billion investment programme. The regional partnership consists of six local authorities, four universities, six colleges and the Regional Enterprise Council – made up of business, social enterprise and third sector representatives from across the region. 18 of the City Region Deal's 20 projects now have Business Cases approved by Joint Committee and it has achieved £305m of Government funding spent (51% of total). The City Region Deal demonstrates that the partners are collaborating effectively to deliver regional infrastructure and for the strategic co-ordination of transport, housing, and economic development.
- 1.2 A key driver for the investment in the City Region Deal was the opportunity to improve inclusion across the city region. The City Region Deal aims to deliver inclusive growth and create new economic opportunities from innovation. The City Region Deal's Integrated Employability and Skills programme, alongside improved transport, and housing provision, aims to ensure that communities and businesses across the region will benefit from the investment.
- 1.3 Since the City Region Deal was signed in 2018, the Benefits Realisation Plans for each project were combined into a Benefits Realisation Plan for the City Region Deal. This was approved by the Joint Committee in September 2020. It can be accessed here [Benefits Realisation Plan](#)

### Fife i3 Programme

- 1.4 The Fife i3 Programme is a long-term investment programme in new business properties and immediately available employment land. It is part of the Deal's Innovation activities. The ambition is to have more innovation-active businesses in Fife, i.e., businesses that are engaged in all forms of innovation. In the medium term, the ambition is to increase business investment in formal innovation such as research and development. In the long-term, this aims to deliver improved productivity and higher value jobs for Fife and the City Region. Short term outputs for the innovation activity include Community Benefits, Construction and supply chain jobs and Site Occupancy. The medium-term impact is jobs, and in the longer-term sustained employment/wage rate uplifts.
- 1.5 The Fife i3 Programme started delivery in April 2019 after the approval of the Full Business Case for Tranche 1 (Years 1-3) of the Programme. This completed in March 2022. Tranche 2 started delivery in April 2022, after Fife Council and Joint Committee approval of its Full Business Case in March 2021. Tranche 3, the final tranche in the Programme was endorsed by the Edinburgh South East Scotland Joint Committee on 1<sup>st</sup> March.

1.6 Table 1: By the end of Tranche 1 (March 2022) the Fife i3 Programme had delivered:

Projects Delivered	Description
Acquisitions 2 sites	Ridge Way, Dalgety Bay (2.59 ha) Fife Interchange North, Dunfermline (6.77 ha)
New Build 2 sites	Flemington Rd, Glenrothes (1,095 m2) Dunnikier, Kirkcaldy (762 m2)
	<b>Total Investment</b> <b>£7.205m</b>

1.7 Table 2: The expected outputs by the end of Tranche 2 are:

Projects to be delivered	Description	Status
Site Servicing	Fife Interchange North, Dunfermline (1.89ha) Lochgelly Site Servicing, Lochgelly (2ha) Ridge Way, Dalgety Bay (2.59ha)	Completed Completed Liaising with potential purchaser
Site Disposals	Ridge Way, Dalgety Bay (2.59 ha) Fife Interchange North, Dunfermline (1.89) Lochgelly (2ha)	Conditional Legal Agreement in place (All)
New Build 7 sites	West Way Business Units, Dalgety Bay (1393m2) Levenmouth Business Units Phase 1/Task Force (741m2)  Fife Interchange North, Dunfermline Business Units (2300m2)  Flemington Road, Glenrothes Business Units Refurb (685m2)  John Smith Business Park, Kirkcaldy Business Units (952m2)  Cowdenbeath Flexible Business accommodation (356m2)  Levenmouth Phase 2 Business Units (966m2)	Completed Onsite - estimated completion May 2024  Onsite - estimated completion Autumn 2024  Onsite Q4 23/24. Estimated completion Spring 2025.  Onsite 24/25  Onsite 24/25  Onsite 24/25
	<b>Total Investment</b>	<b>£34.820m</b>

- 1.8 Note: The Beechway, Dalgety Bay Acquisition/Site Servicing project was removed from the Programme after an unsuccessful attempt to purchase the site.

## 2.0 City Region Deal Annual Report 2022 - 2023

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- 2.1 The 2022/23 Edinburgh South East Scotland City Region Deal Annual Report was published in September 2023. Page 10 of the Annual Report in Appendix 1 lists the projects in the City Region Deal and their status. The City Region Deal has a comprehensive governance structure which is summarised in the diagram on Page 13 in the Annual Report. The latest Financial Summary is on Page 14 in the Annual Report. The report also included the release of video case studies including the Fife i3 Programme. [Fife Innovation Park \(youtube.com\)](https://www.youtube.com/watch?v=...).
- 2.2 **The City Region Deal – summary of progress**
- 2.2.1 Section 4 of the Annual Report from Page 17 summarises the themes, programmes, and projects within the City Region Deal. It details the progress that has been made in line with the Implementation Plan. Page 19 reports, that the first phase of the Data Driven Innovation (DDI) programme ends in 2023/24 with the completion of the last two DDI Hubs, the Usher Institute and Edinburgh Futures Institute.
- 2.2.2 The Integrated Regional Employability and Skills (IRES) Programme and its cross-sector partnership seeks to evolve regional labour market policy and practice to help drive inclusive growth. The programme continues to focus on five improvement pillars targeting known areas of weakness or opportunity. It has supported over 250,000 (23,858 in Fife) people to improve their skills and gain new knowledge through training and/or education and helped over 4,700 (1,481 in Fife) people secure employment. An additional £6.53m funding has been secured so far to enhance IRES activity. The full update is set out in Pages 43 – 48.
- 2.2.3 Fife Council is the lead partner for the Intensive Family Support Service (IFSS) working with the family as well as the individual client. A Holistic Whole Family Support conference took place in February 2023. The conference raised the profile of holistic whole family support in the region and built connections between organisations serving families. Several IFSS delivery partners and clients were involved in the workshops including one parent and one young person engaging in the Fife service who shared their experience. The conference had 157 attendees representing 70 organisations.
- 2.2.4 Phase Two of the Intensive Family Support Service commenced in January 2023 following a six-month period of consultation with stakeholders and families led by The University of Edinburgh. The research and learning from Phase One informed the direction of Phase Two. A recommissioning process has been undertaken where delivery partners proposed changes in response to the revised specification. In Phase Two, work will continue with those Phase One families who continue to require support, and to engage with at least 141 further families.
- 2.2.5 The City Region Deal Regional Housing Programme aims to accelerate the delivery of affordable housing and housing across all tenures, enable the development of seven major strategic housing sites (Blindwells, Calderwood, Dunfermline, Edinburgh's Waterfront, Shawfair, Tweedbank and Winchburgh). The strategic development in Dunfermline will see the delivery 2000 affordable homes, however, the scale of planned strategic growth across Dunfermline requires significant upfront infrastructure, primarily education and transport infrastructure. This poses a real challenge to the delivery of the strategic sites. The Council have secured an initial grant of £4.85m via the City Region Deal's Housing Infrastructure Fund to assist with the delivery of transport infrastructure

with a further £12m available over future parliamentary periods. Whilst this has been crucial to progressing key transport infrastructure projects, there is no equivalent fund available to assist with the delivery of education infrastructure to accommodate new growth. The Planning Service continue to work with the housing industry to explore innovative funding models to deliver education infrastructure.

## **2.3 The Fife i3 Benefits Realisation Process**

- 2.3.1 In October 2020, the Fife i3 Programme Board approved the process for benefits management for the Programme. It aims to ensure consistency across all projects to ensure that the delivery of benefits is monitored at both a project and programme level, at the appropriate stage in delivery. It aligns with the Edinburgh and South East Scotland City Region Deal Benefits Realisation Plan.
- 2.3.2 The baseline for the Fife i3 programme benefits was established in the Full Business Case in 2019. Benefits are monitored and assessed through the Fife i3 Programme Change Control process. Changes are captured through Exception Reports, compared against the baseline level set in the Project Business Case. New benefits projections are captured, if approved by the i3 Programme Board. The Finance, Economy and Corporate Services Scrutiny Committee considered the approach in June 2023.

## **2.4 The Benefits Realisation Approach**

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### **Innovation and Inclusive Growth**

- 2.4.1 Achieving increased sustainable economic growth and reducing inequalities are central to the City Region Deal's ambitions. There are four of these relevant to the Fife i3 Programme. They are:
- accelerating inclusive growth.
  - removing the barriers to growth.
  - delivering community benefits through procurement.
  - Innovation.
- 2.4.2 The innovation focus of the Fife i3 Programme offers an opportunity to support companies to work in new ways, to help them prosper and create new and better jobs. The ambition is to have more innovation-active businesses in Fife. The Fife i3 Programme also aligns with the City Region Deal's Integrated Regional Employability and Skills Programme, including the data-driven innovation (DDI) Skills Gateway project.
- 2.4.3 The Fife i3 Programme ensures that the innovation objectives are met through the application process for potential tenants or purchasers to ensure these are let/sold to businesses with: an aspiration to grow (turnover and/or staff numbers); are enthusiastic about the benefits that new ways of working can bring and are committed to developing this; and will put fairness and equality at the heart of their workforce planning.
- 2.4.4 Tenants who are successful in the application process are also referred to Business Gateway Fife for discussions on the support available to help them achieve their business objectives.

## **2.5 Delivering community benefits through Procurement**

- 2.5.1 The City Region Deal has developed an online portal where community groups can publicise their project requiring assistance from potential suppliers. Work is ongoing to

promote the use of <https://www.esescommunities.org/> This matches communities and good causes with suppliers in the City Region.

2.5.2 The portal must be included in all tender requests issued by the Fife i3 Programme, to make suppliers aware of the Council's requirements and encourage local matches.

2.5.3 There are six ways in which procurement helps deliver Inclusive Growth in the City Region Deal. These include:

- New employment opportunities.
- Working with local supply chains through the Scottish Supplier Development Programme.
- Sustainability/reduced carbon.
- Fair work practices.
- Education and outreach.
- Community cohesion.

2.5.4 Supplier engagement is core to delivering Inclusive Growth, to support good procurement. Fife Council's Property and Building Services support suppliers to help shape delivery of these benefits. The Economic Development team provides supplier support and tendering training. There is ongoing work to engage with successful contractors to ensure community benefits are captured throughout the contract duration. The programme collects this quarterly. Building Services and Property services attended the Meet the Buyer Event at Carnegie Conference Centre in November 2023 to highlight upcoming opportunities for suppliers as part of the Fife i3 Programme.

## 2.6 Economic Benefits

2.6.1 An Economic Impact Assessment (EIA) appraised the likely impact of the Fife i3 Programme on key economic indicators as part of its Business Case. The EIA uses economic data and evidence, alongside key assumptions to model the impact of the programme. The inputs and assumptions have been updated for the Tranche 3 Business Case.

2.6.2 The programme has faced considerable challenges due to COVID, Brexit and high levels of inflation. This has slightly altered the original projected benefits as projects are costing more to deliver. However, the programme is still delivering good outputs and providing longer term benefits to the local economy. The expected programme benefits are shown in the table below:

2.6.3 Table 3: Overview of Expected Programme Benefits

	Original FBC 2018	Tranche 2	Tranche 3	Reason for movement
Permanent jobs (net average p.a.)	1095	1035	833	Loss of land at Fife Interchange North as a result of planning requirements. Fewer site servicing projects as sites taken forward by private sector.
Gross Construction Jobs (cumulative)	596	625	591	Rising costs has resulted in increased expenditure, and reduced project outputs.

GVA per £1 invested	£28	£24	£21	Rising costs has resulted in increased expenditure, and reduced project outputs.
Cost per job	£44,340	£49,224	£69,707	Due to the inclusion of VDLF (Vacant & Derelict Land funding) and other funding (partly to address additional COVID costs), alongside the reduction in the projected number of jobs.

## 2.7 Climate Change Benefits

2.7.1 The Scottish Government developed Carbon Guidance: [Scottish City Region Deals: carbon management guidance](#) based on the PAS2080 standard for managing carbon in building and infrastructure. During Tranche 2, the Fife i3 programme has adopted this guidance voluntarily. It will be mandatory for Tranche 3 projects.

2.7.2 Business Cases for New Build projects in Tranche 2 projects capture and monitor their:

- Operational EPC (Energy Performance Certificate)
- Operational Annual Heat Energy Demand (kWh/m2/yr.)
- Embodied Carbon (kgCO2e/m2)

2.7.3 A baseline for embodied carbon (580 kgCO2e/m2) was produced from the specification for the Queensway 1 Units, in Glenrothes. This is now being used to target reductions in Tranche 2 and 3 New Build projects. The results will be available following the completion of the projects. This takes next steps towards meeting the challenge of the Climate Change Emergency and the Council's commitment to achieving Net Zero Carbon by 2030.

## 2.8 Tenants' Feedback

2.8.1 Many of the benefits from the Fife i3 Programme can only be measured by an annual survey of the tenants of the new business units.

2.8.2 Table 4: In late 2023 / early 2024, fifteen tenants (out of 18) provided feedback on the benefits realised, results as follows:

Benefit	Actual as at March 2024	Results from December 2022
Floorspace completed (internal)	3250 sqm	1857sqm
Ha of Immediately Available Serviced Land	6.48ha	Zero
Rents achieved (£ per sq. ft)	Flemington, Glenrothes – £7.50 Dunnikier, Kirkcaldy – £8 Westway, Dalgety Bay - £8.50	Flemington, Glenrothes – £7.50 Dunnikier, Kirkcaldy – £8
Gross Development Yield	Flemington, Glenrothes – 2.61% Dunnikier, Kirkcaldy – 2.27%	Flemington, Glenrothes – 2.61% Dunnikier, Kirkcaldy – 2.27%

	Westway, Dalgety Bay - 3.19%	
Jobs created / safeguarded	90 new jobs, 55 safeguarded – total of 144	40 new jobs, 32 safeguarded – total of 72
Private sector leverage (Capital investment by tenants fitting out the interior of their unit)	Flemington – £103K Dunnikier – £51K Westway - £130K 15 out of 18 businesses provided this. The average investment per unit was £2k	Flemington – £103K Dunnikier – £51K 8 out of 11 businesses provided this. The average investment per unit was £17k
Better Quality jobs	15 out of 18 businesses confirmed they pay the Real Living Wage. 9 out of 18 businesses provided average salaries – £27,600.	10 out of 11 businesses confirmed they pay the Real Living Wage. 8 out of 11 businesses provided average salaries – £24,250.
Innovation Active Companies	All tenants met this requirement. Businesses were referred to Business Gateway if required.	All tenants met this requirement. Businesses were referred to Business Gateway if required.

2.8.3 The tenants were asked what Community Benefits they are providing. Some of the examples they deliver include:

- Donate excess stock to Castle Furniture, Possible sponsorship of local basketball team, offer NHS discount.
- Buy shop / locally / use local contractors.
- Sponsorship to local charities, sponsor local football teams and athletes, make annual charitable donations at Christmas.

## 3.0 Conclusions

- 3.1 This report outlines the highlights from the Edinburgh South East Scotland City Region Deal Annual Report for 2022/23, focusing on what is being delivered within Fife.
- 3.2 It provides an update on the Benefits Realisation Plan for the Fife i3 Programme, and current approach to measuring Carbon Impact.
- 3.3 The summary sets out the benefits being measured, and the performance projected to be achieved at the end of Tranche 3.
- 3.4 The i3 Programme has relevant and appropriate Benefits in terms of the City Region Deal Benefits Realisation Plan and processes in place to report and manage these.

### List of Appendices

1. Edinburgh South East Scotland Annual Report 2022/23

### Background Papers

The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act, 1973:-

- The City Region Deal [esescityregiondeal-Deal-Document-signed-6-August-2018](#)

- City Region Deal Benefits Realisation Plan [5.3 Benefits Realisation Plan with appendices.pdf \(edinburgh.gov.uk\)](#)
- Fife Industrial Innovation Investment (I3) Programme Full Business Case for Tranche 1 (Pages 91 – 168) [Edinburgh South East Scotland City Region Deal Joint Committee 01.03.19.pdf](#)
- Fife Industrial Innovation Investment (I3) Programme Full Business Case for Tranche 2 [2103 ESES Joint Committee Report Fife I3 Investment Programme FBC](#)
- Fife Industrial Innovation Investment (I3) Programme Full Business Case for Tranche 3 [Public Pack ESES CRD Joint Committee 01/03/2024](#)
- Benefits Realisation Plan - Fife Industrial Innovation Investment (I3) Programme [FECS Scrutiny Public Agenda Pack 2023-06-15](#)

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# CITY REGION DEAL

Edinburgh  
& South East  
Scotland

## ANNUAL REPORT 2022 – 2023





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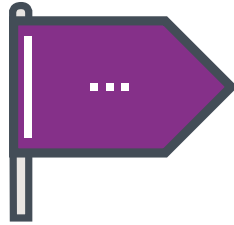


# Executive Summary

## Key Achievements



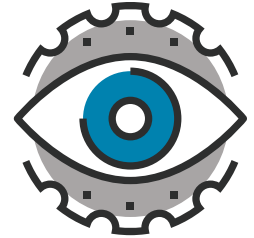
**£58.8m** spent in 2022/23



**1,268** enrolments in data upskilling short courses, **70%** up on last year



**47%** of total Government allowance has been drawn down in first 5 years of 15-year programme



**20** of **22** projects now in Implementation or Delivery phase



DataLoch supported more than **£6.5m** in research revenue



**£300k** funding secured to boost skillsets for retrofit and net zero in homes



IRES programme has improved the skills of **103,000** people and helped **4,500** into work



**677** learners have been awarded Data Skills Credits



**543** of the **728** mid-market rent homes have been delivered through Edinburgh Living



**800** approvals, **2,300** site starts and **2,400** completions for affordable homes across the region – ahead of target



## Executive Summary

### Timeline



**National Robotarium opens**



**First building occupied in Borders Innovation Park**



**Transport Barrier Baseline Report** published by Workforce Mobility project



**City Region Deal Benefits Realisation Framework** published and adopted



**Site clearing commences** for Dunard Centre construction



**Work completed at West Way, Dalgety Bay** as part of Fife Industrial Innovation Investment Programme



**Regional Prosperity Framework Delivery Plan** published and adopted



**2 years of funding committed** for Regional Housing Alliance for the South East of Scotland



**Community Wealth Building Framework for Action** and accompanying pledge launched



**Consultation for Broxburn to Maybury public and active travel launched** part of West Edinburgh Transport Appraisal project



**New A1 Junction to unlock Edinburgh Innovation Park,** East Lothian opened



**Bus Driver Careers campaign launched** part of the Workforce Mobility project



**Green Economy Jobs Campaign launched** as part of Integrated Employer Engagement project



## Executive Summary

### Video Highlights

A showcase of the diverse and innovative initiatives supported by the Edinburgh and South East Scotland City Region Deal, featuring the people and organisations behind the projects, their delivery partners across the region, and those who are benefiting.

#### Women in Data

The PDA Data Science programme is delivered by Edinburgh College through the Data Education in Colleges project. The programme is aimed at reducing the gender imbalance within IT and Tech roles by supporting women to enhance their skills in digital and data innovation. We hear from several students enrolled on the course who are taking the opportunity to further their learning, enhance their lives and advance in their careers.



#### Ukrainian Construction Academy

The Integrated Employer Engagement project worked with Balfour Beatty, lead contractor for the Edinburgh Futures Institute to design and deliver a construction academy for members of the Ukrainian Community who had been resettled within our region. The programme supported 13 people to obtain the required UK industry qualifications which led to them securing sustainable employment and additional further education opportunities.



#### BE-ST Retrofit

The Housing, Construction and Infrastructure (HCI) Skills Gateway is changing construction across Edinburgh and South East Scotland. With almost 40% of UK greenhouse gas emissions emitted by the built environment, it has never been more important to work together to inspire new careers and upskill existing experts to achieve sustainable low carbon housing and construction.



#### Dunard Centre

The Dunard Centre is being delivered as part of the Edinburgh and South East Scotland City Region Deal as the sole project in the 'Culture' theme. We hear from those making this centre a reality, as well as Beth Malcolm, a performer who shares why this space is so exciting to her as one of Scotland's up and coming performers.





## Executive Summary

### Fife Innovation Zone

The Fife Innovation Zone is being delivered as part of the Edinburgh and South East Scotland City Region Deal's innovation theme. It delivers a sustained investment programme in modern business premises. In this video, we explore in further detail the methods being used to save energy, and contribute to the wider economic growth in Fife, and speak to a tenant directly operating out of the innovation zone.



### Data Education in Schools

The Data Education in Schools programme is for children and young people across the City Region to learn about data to benefit their personal lives and open up new possibilities for interesting and well-paid careers. One example can be seen in Addiewell Primary School, where children of learnt about the impact Co2 levels have on their own learning and focus, as well as how it effects a reptilian friend in the Five Sisters Zoo.



### Bus Driver Careers

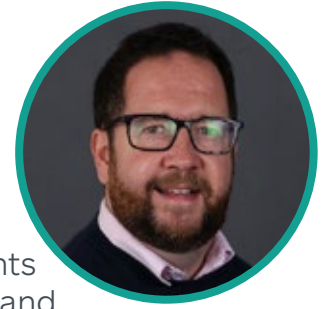
The Workforce Mobility Project launched a Bus Driver Career video to promote career opportunities in the industry. Hear from various bus operator staff who share their experiences including the 'benefits of the job', 'career progression opportunities' and 'the investment in you by the operators'.



### Green Economy Jobs

To achieve ambitious climate change goals, we need to work together across all sectors to create a workforce with the required skills and understanding of sustainability. This will drive forward a truly green economy. This campaign aims to inform and encourage everyone to think about the impact they can make within their own career choices. Hear from experienced and passionate individuals from various sectors sharing their ideas and practices about making a difference.





## 1. Forewords

### Cllr Euan Jardine

Convener of the Edinburgh and South East Scotland City Region Deal Joint Committee

The Edinburgh and South East Scotland (ESES) City Region Deal celebrated its fifth anniversary on 7 August. Excellent progress has been made in delivering the £1.5 billion programme to create new economic opportunities, increase prosperity, promote inclusion and reduce inequalities. The ESES regional partnership brings together six local authorities, four universities, six colleges and the Regional Enterprise Council – made up of business, social enterprise and third sector representatives from across the region.

Business cases for 18 of 20 Deal projects have been approved and are now being implemented. Particular highlights in the last 12 months include the opening of the **National Robotarium** in September 2022, the launch of the **Usher Innovation Community** in November 2022 and the completion of the Edinburgh Innovation Park A1 grade separated junction in May 2023.

Over 66,000 skills enhancements and 4,500 job outcomes have been delivered through the Integrated Regional Employability and Skills programme to increase employment and career progression opportunities for the city region's residents. In the Borders Innovation Park at Tweedbank, we now have an amazing new Digital Centre of Excellence where our Inspire Learning programme delivers learning opportunities, training and events for children and young people, teachers and communities to improve their digital skills. Greater detail about every project is in Section 4.

Short case-study videos throughout the report vividly highlight the positive impact that projects are having on our residents' lives.

Ensuring that investments support strategic plans and priorities is crucial in delivering the greatest benefits locally, regionally and nationally. **Our Regional Prosperity Delivery Framework** was approved in March 2023 and sets out an ambitious and dynamic series of four key programmes to deliver the region's ambitions: Green Regeneration and Skills; Infrastructure for Recovery and Prosperity; Visitor Economy and Culture; and a Data Driven Innovation (DDI) Enabled Economy.

You can read more about this regional collaboration in Section 6.

Beyond the Deal's projects, our regional cohesion and robust governance enables us to respond effectively to challenges and opportunities. Examples include:

- The successful Green Forth Freeport bid which was **endorsed by Joint Committee** to boost innovation and inclusive growth within our communities.
- Contributing our regional perspective to key consultations including National Planning Framework 4; the National Strategy for Economic Transformation; the Strategic Transport Projects Review 2; and the Scottish Government's Regional Economic Policy Review.
- Establishing a series of regional propositions for the region's six local authorities to deliver utilising the UK Government's **Shared Prosperity Fund**.

We will build on these successes and the strength of our regional partnership to further accelerate prosperity and inclusion to ensure the benefits are fully enjoyed across the region.



## 1. Forewords

### Garry Clark

Chair of Regional Enterprise Council

It has been a great pleasure to reflect on the impactful progress made in the fifth year of the Edinburgh and South East Scotland City Region Deal.

#### **The Regional Enterprise Council (REC)**

was formed in November 2018 to advise the Deal's decision-making body, the Joint Committee, on the delivery of projects across the city region and to encourage further investment opportunities. In directly participating on the Joint Committee and Elected Member Oversight Committee, we represent business, social enterprise and wider third sector across the region and help to ensure that the benefits from the Deal support our shared ambition for achieving sustainable and inclusive economic growth throughout the city region. REC members bring a broad range of experience, expertise and wide networks to best represent business, social enterprise and wider third sector across the city region.

We helped to develop the Regional Prosperity Framework vision and shape the related **Delivery Framework** which was approved in March 2023. It is encouraging to see this ambitious 20-year economic plan enter its delivery phase with strong support across the region. We have also witnessed the success of the Forth Green Freeport bid in January 2023 following the REC's support of the bid and its strong focus on quality jobs, upskilling, small business facilities and a 'Just Transition' away from hydrocarbons. This should help to both tackle inequalities and to achieve our net-zero carbon aspirations.

### Garry Clark



#### The Deal's **Benefits Realisation Measurement Framework**

was also approved in March 2023, which will ensure that the Deal impacts are realised and maximised across the whole city region.

The REC is particularly determined to promote the use of **Community Wealth Building**, to ensure that every Deal programme works together to maximise synergies and open up new opportunities for local businesses and communities alike. We are pleased to see the creation of the **CLES Framework for Action** specially for the Deal and the Community Benefits **regional portal** has now delivered 60 matches between suppliers and good causes.

A lot has been achieved in the last 12 months and in the first five years of the ESES City Region Deal. This provides the economic platform which the regional partnership will use as a springboard to ensure that the engine room of the Scottish economy delivers further prosperity and opportunity to its citizens and to the rest of Scotland.

Finally, a special thank you to Claire Pattullo, who stood down from the REC this year, having served first as Vice Chair and then as Chair since its creation. Claire has made an enormous contribution to the development and success of the Deal. In particular, she has been a tireless champion of the role that the third sector brings to the Deal and this will be a vital legacy to develop.





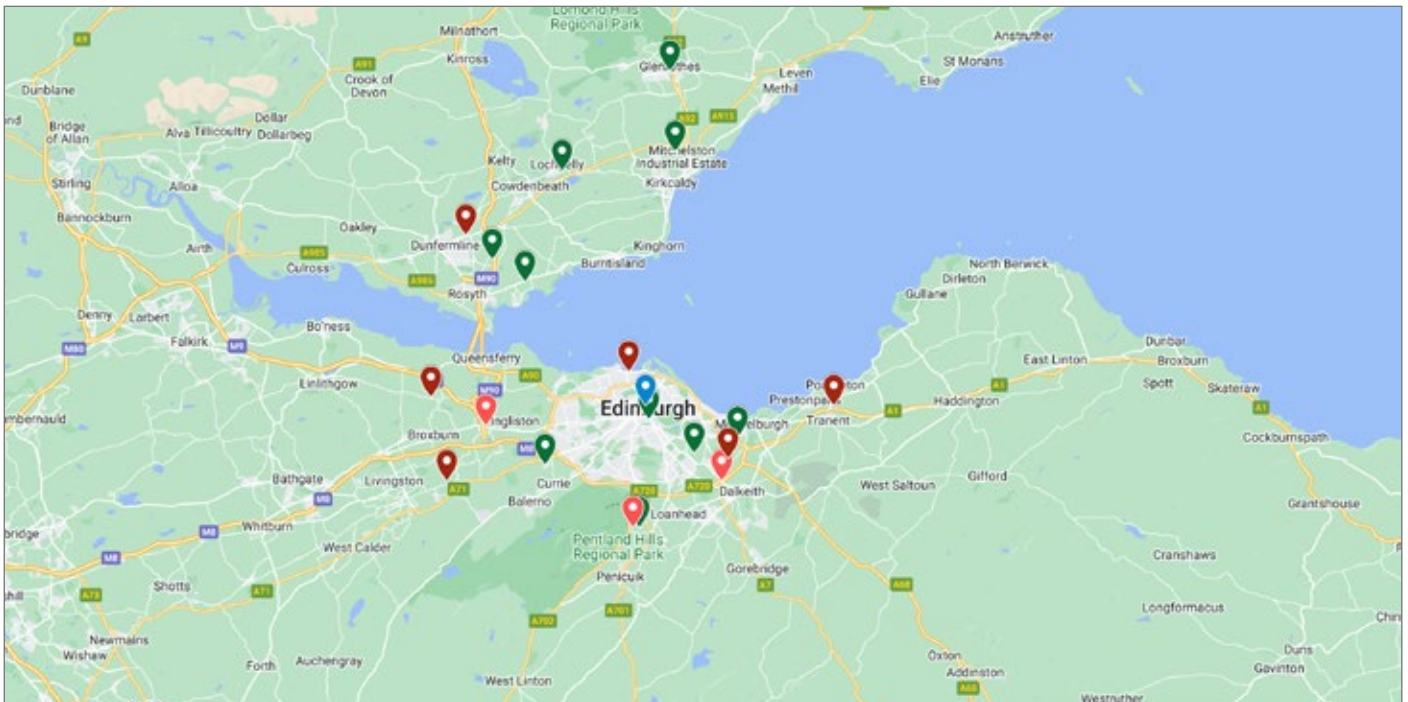
## 2. City Region Deal Overview

### Status of Projects and Finances

The Edinburgh and South East Scotland City Region Deal is now a **£1.5 billion\*** (originally £1.3 billion), **15-year programme** aimed at driving productivity and reducing inequalities through five key themes:



**\*Original figures were:**  
Research, Development & Innovation – £791m  
Culture – £45m  
but have grown due to increased partner contributions.



**This map shows where the projects are located across the region**

Integrated Regional Employability and Skills (IRES) activity spans across the whole City Region and is integrated into all projects.

-  Research, Development and Innovation
-  Transport
-  Culture
-  Strategic Housing Sites



## 2. City Region Deal Overview

The 23 City Region Deal projects are listed in the Table below. More detail on the projects, including their current status in **Section 4**.

**Table 1: Status of Programmes and Projects – July 2023**

Theme/Programme/Project	Location	Business Case Approval Link	Stage	On Time?	On Budget?
<b>Research, Development and Innovation</b>					
Edinburgh International Data Facility	Edinburgh/Midlothian	<b>Dec 18</b>	3. Deliver		
Bayes Centre	City of Edinburgh	<b>Dec 18</b>	3. Deliver		
National Robotarium	City of Edinburgh	<b>Dec 18</b>	3. Deliver		
Edinburgh Futures Institute	City of Edinburgh	<b>Mar 19</b>	2. Implement		
Usher Institute	City of Edinburgh	<b>Sep 19</b>	2. Implement		
Easter Bush	Midlothian	<b>Mar 21</b>	2. Implement		
Edinburgh Innovation Park (Food and Drink Innovation Hub)	East Lothian	<b>Jun 21</b>	2. Implement		
Fife Industrial Innovation Investment	Fife	<b>Mar 19</b>	2. Implement		
Borders Innovation Park	Scottish Borders	<b>Mar 19</b>	2. Implement		
<b>Integrated Regional Employability and Skills</b>	Cross-Regional	<b>Dec 18</b>			
Integrated Knowledge Systems	Cross-Regional	<b>Jun 19</b>	3. Deliver		
Labour Market Analysis and Evaluation	Cross-Regional	<b>Jun 19</b>	3. Deliver		
Integrated Employer Engagement	Cross-Regional	<b>Jun 19</b>	3. Deliver		
Intensive Family Support	Cross-Regional	<b>Mar 19</b>	3. Deliver		
Data-Driven Innovation Skills Gateway	Cross-Regional	<b>Mar 19</b>	3. Deliver		
Housing and Construction Infrastructure Skills Gateway	Cross-Regional	<b>Mar 19</b>	3. Deliver		
Workforce Mobility	Cross-Regional	<b>Jun 19</b>	3. Deliver		

Table continues overleaf



## 2. City Region Deal Overview

The 23 City Region Deal projects are listed in the Table below. More detail on the projects, including their current status in **Section 4**.

**Table 1: Status of Programmes and Projects – July 2023**

Theme/Programme/Project	Location	Business Case Approval	Stage	On Time?	On Budget?
<b>Transport</b>					
West Edinburgh	City of Edinburgh	<b>Expected Mar 24</b>	1. Define		
A720 (Sheriffhall Roundabout)	Edinburgh/Midlothian	<b>TBC</b>	1. Define		
<b>Culture</b>					
Dunard Centre	City of Edinburgh	<b>Mar 22</b>	2. Implement		
<b>Regional Housing Programme</b>	Cross-Regional	<b>Sep 19 (work prog report)</b>			
Affordable Housing Programme	Cross-Regional	<b>N/A</b>	3. Deliver		<b>N/A*</b>
Seven Strategic Sites	Cross-Regional	<b>Winchburgh: Aug 18 Dunfermline: Jun 21 Granton: Dec 21</b>	2. Implement		
Innovation and Skills	Cross-Regional	<b>N/A</b>	2. Implement		<b>N/A*</b>
Edinburgh Living (housing company)	Cross-Regional	<b>N/A</b>	3. Deliver		

\* No Government funding through the City Region Deal

### Project Stages

Stage no.	Definition
1. Define	Business case being developed, and not yet approved by Thematic Board and Joint Committee.
2. Implement	Business case has been approved by Thematic Board and Joint Committee, and is being implemented. In a capital project, this may be construction; for skills projects this may be establishing a course or system.
3. Deliver	Project is in place and benefits realisation framework to assess if it is achieving its objectives.
4. Legacy	Project has resulted in mainstreaming or improvements to business as usual (impact) that is generated beyond the funded period.

**T:** Status against **timeline** set out in business case/implementation plan **B:** Status against budget set out in financial plan

RAG Status	Definition – Timeline	Definition – Budget	Action Required
	In line with business case/ implementation plan	In line with spend set out financial plan for the current financial year.	No management action required
	Delay exists but is considered acceptable by PMO.	Spend is within acceptable range from what is set out financial plan for the current financial year. Project lead is confident that spend will be to profile at financial year end.	Management action is in place by senior management to address issues, and project is being closely monitored.
	Delay is significant.	Spend is outwith acceptable range from what is set out financial plan for the current financial year. Project lead does not consider that spend will be to profile at financial year end.	Immediate action is required by senior management and relevant Boards as appropriate to address issues. Issues must be highlighted to Government.



## 2. City Region Deal Overview

### Stages

As of 1 July 2023:

**2** Projects are in



Define, which means that the project's business case is yet to be completed (same number as last year)

**9** Projects are in



Implement, which means that the project's business case has been approved by Joint Committee and is in the process of being implemented (15 last year)

**12** Projects are in



Deliver, which means that the project has been implemented and is working towards delivering its objectives (6 last year)

### Time and Budget

**15** Projects

are considered to be on target to be completed on time (green score) or have been completed on time

**8** Projects

are delayed, but considered to be within an acceptable range, with management action in place to address the issue (amber score)

**17** Projects

are considered to be on target to be completed within the specified budget so far for the 2023/24 financial year (green score) or have been completed within the specified budget

**2** Projects

are projected to cost more than the specified budget so far for the 2022/23 financial year, but considered to be within an acceptable range, with management action in place to address the issue (amber score)

**1** Project

is projected to spend outwith the acceptable range for the financial year (red score) and immediate action is required to address the issues it faces

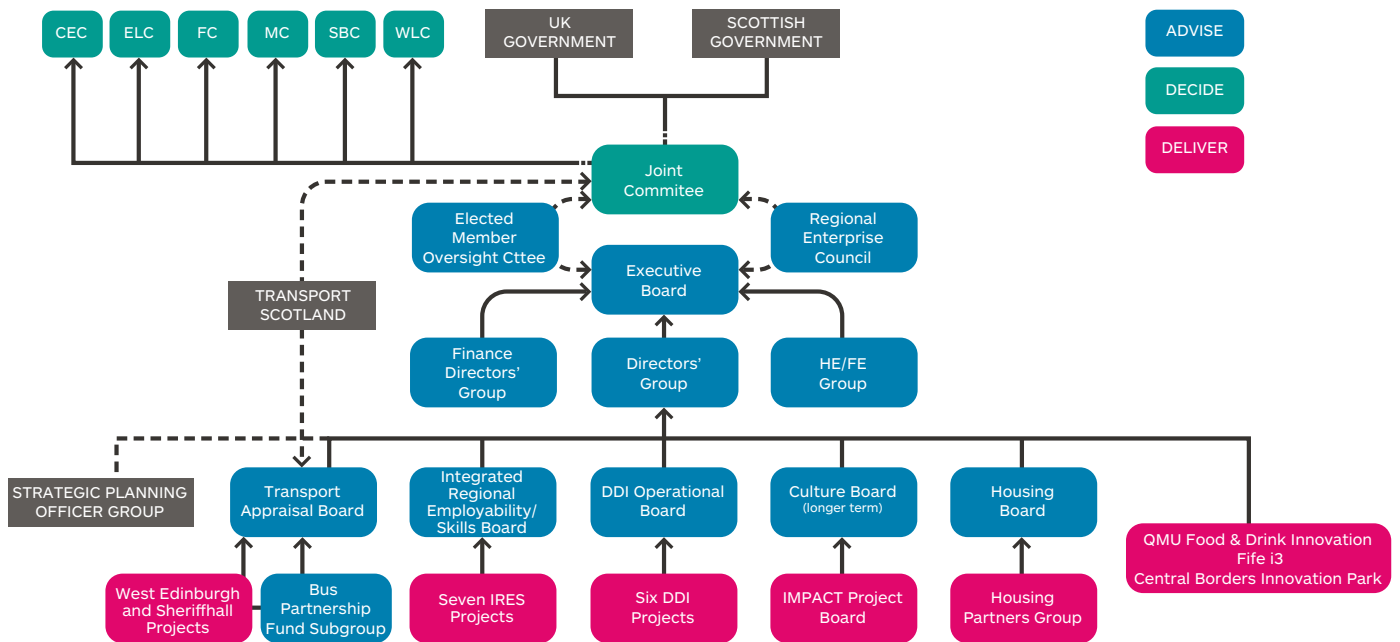


## 2. City Region Deal Overview

### Governance

The City Region Deal has a comprehensive governance structure. This is summarised in the diagram below. There is more detail on the Boards and Groups in Section 3 of the **Deal Document**:

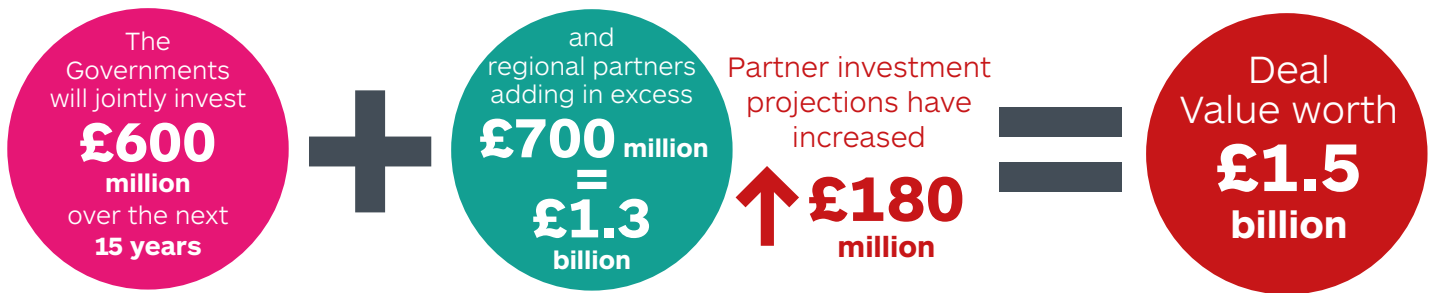
### Functioning Governance





### 3. Financial Statement

This City Region Deal identifies new and more collaborative ways that partners will work with United Kingdom Government and Scottish Government to deliver change to the city regional economy. The Governments will jointly invest £600 million over the next 15 years and regional partners committed to adding in excess of £700 million, overall representing a deal worth £1.3 billion. Since the Deal was signed, partner investment projections have increased by over £84m. As a result, the value of the Deal is now almost £1.4 billion. A summary of the City Region Deal total over a fifteen-year period is shown in the Table 2:



**Table 2 Edinburgh and South-East Scotland City Region Deal Financial Summary**

Project	SG Contribution (£m)	UKG Contribution (£m)	Partner Contribution*** (£m)	Total Funding (£m)
Bayes Centre	2.24	30.31	80.71	<b>113.25</b>
Borders Innovation Park	15.00	0.00	14.14	<b>29.14</b>
Easter Bush	1.27	16.10	69.77	<b>87.13</b>
Easter Bush Link Road	0.00	10.90	43.06	<b>53.96</b>
Edinburgh Futures Institute	2.24	55.68	216.89	<b>274.81</b>
Edinburgh Innovation Hub	1.42	28.58	21.94	<b>51.94</b>
Edinburgh International Data Facility	0.67	78.93	52.80	<b>132.40</b>
Fife i3 Programme	35.00	0.00	15.25	<b>50.25</b>
National Robotarium	1.43	21.04	0.00	<b>22.47</b>
Usher Institute	0.73	48.46	76.98	<b>126.18</b>
<b>Total Research, Development &amp; Innovation</b>	<b>60.00</b>	<b>290.00</b>	<b>591.54</b>	<b>941.54</b>
Dunard Centre	10.00	10.00	54.93	<b>74.93</b>
<b>Total Culture</b>	<b>10.00</b>	<b>10.00</b>	<b>54.93</b>	<b>74.93</b>
Integrated Regional Employability & Skills Programme	25.00	-	0.00	<b>25.00</b>
<b>Total Integrated Regional Employability &amp; Skills</b>	<b>25.00</b>	<b>-</b>	<b>0.00</b>	<b>25.00</b>

Table continues overleaf



### 3. Financial Statement

Project	SG Contribution (£m)	UKG Contribution (£m)	Partner Contribution*** (£m)	Total Funding (£m)
A720 Sheriffhall Roundabout*	120.00	-	0.00	<b>120.00</b>
West Edinburgh Public Transport Improvement Programme	20.00	-	16.00	<b>36.00</b>
<b>Total Transport</b>	<b>140.00</b>	<b>-</b>	<b>16.00</b>	<b>156.00</b>
New Housing Partnership – Edinburgh Living**	15.00	-	248.00	<b>263.00</b>
Housing Infrastructure Fund**	50.00	-	0.00	<b>50.00</b>
<b>Total Housing</b>	<b>65.00</b>	<b>-</b>	<b>248.00</b>	<b>313.00</b>
<b>Grand Total</b>	<b>300.00</b>	<b>300.00</b>	<b>910.47</b>	<b>1,510.47</b>

\*Includes £120m for Sheriffhall roundabout to be delivered by Transport Scotland.  
 \*\* Funding issued by Scottish Government (Housing). Partner contribution of £248m relates to CEC on-lending.  
 \*\*\* These are projections as not all partner contributions have been secured yet.



### 3. Financial Statement

The City Region Deal Financial Summary for the period of April 2021 to March 2022 is set out in Table 3.

Total expenditure for the year amounted to...



**Table 3 Edinburgh and South-East Scotland City Region Deal 2022-23**

Project	2022-23	Cumulative (2018/19 - 2022/23)	
	CRD Expenditure (£m)	CRD Expenditure (£m)	CRD Expenditure as % of Funding
Bayes Centre	0	32.55	100%
Borders Innovation Park	0	2.33	16%
Easter Bush	0.07	16.50	95%
Easter Bush Link Road	0.52	0.90	8%
Edinburgh Innovation Hub	1.20	1.20	4%
Edinburgh Futures Institute	0	57.92	100%
Edinburgh International Data Facility	10.70	50.93	64%
Fife i3 Programme	3.89	13.23	38%
National Robotarium	4.96	20.28	90%
Usher Institute	27.35	49.12	100%
<b>Total Research, Development &amp; Innovation</b>	<b>48.68</b>	<b>244.95</b>	<b>70%</b>
Dunard Centre	4.91	6.79	34%
<b>Total Culture</b>	<b>4.91</b>	<b>6.79</b>	<b>34%</b>
Integrated Regional Employability & Skills Programme	4.06	11.55	46%
<b>Total Integrated Regional Employability &amp; Skills</b>	<b>4.06</b>	<b>11.55</b>	<b>46%</b>
A720 Sheriffhall Roundabout*	1.08	6.31	5%
West Edinburgh Public Transport Improvement Programme	0.06	0.17	1%
<b>Total Transport</b>	<b>1.14</b>	<b>6.48</b>	<b>5%</b>
New Housing Partnership – Edinburgh Living**	0	15.00	100%
Housing Infrastructure Fund**	0	0	0%
<b>Total Housing</b>	<b>0</b>	<b>15.00</b>	<b>23%</b>
<b>Grand Total</b>	<b>58.79</b>	<b>284.77</b>	<b>47%</b>

\*Scottish Government funded. Transport Scotland taking forward scheme delivery.  
 \*\* Funding issued by Scottish Government (Housing).

Across the Deal programme, £284.8m of the £600m government funding has been drawn down to March 23. This includes funding issued by Transport Scotland and Scottish Government Housing Department.





## 4. The Deal – summary of progress

This section summarises the themes, programmes and projects within the City Region Deal. It details the progress that has been made in line with the Implementation Plan.



Quarterly performance reports are shared between the Project Management Office (PMO) and Governments throughout the year and are published at each Joint Committee meeting.



## 4. The Deal – summary of progress

### Data-Driven innovation

The DDI programme is a 15-year, £661m investment and innovation initiative launched in August 2018, supported by £270m capital funding from the UK and Scottish Governments as part of the City Region Deal. It is built upon a foundation of six decades of world-leading AI and Informatics research, and a strong digital business ecosystem that has evolved in the city region over the past 20 years.



At the end of the 2022/23 financial year, DDI reached a half-way milestone. Except for some delays caused by the Pandemic, DDI made excellent progress in the first five years, with a focus on finalising the business cases for capital funding, securing large flagship projects across ten industry sectors, and building and equipping DDI Innovation Hubs across two universities.

At the end of March 2023, the cumulative five-year draw-down was £207m, £78.7m ahead of the original City Region Deal plan.

The National Robotarium, a collaborative hub between Heriot Watt University and the University of Edinburgh, was opened in September 2022 with laboratories in ocean systems, human-robotic interaction, and assisted living. The Robotarium offers an ecosystem for industry collaboration where humans and robots work in partnership.

DDI Hubs are also well ahead with the delivery of TRADE (Talent – Research – Adoption – Data - Entrepreneurship) key performance indicators. Examples from 2022/23 include:

- In Talent, the first 150 students joined the fusion teaching programmes of the **Edinburgh Futures Institute**. Designed to offer maximum flexibility for students, they are proving to be extremely popular. Multi-disciplinary programmes cover diverse domains from Education Futures to Future Governance; Service Management and Design; and Data, Inequality and Society.

In the wider skills space, the **Data Skills Gateway** reached around 34,500 participants, from school-aged children to women returners. The **Data Education in Schools** team has boosted data literacy in more than 850 schools, creating learners fluent in using data to answer big societal questions and teachers who are confident to teach data skills.

- In Research, the DDI Hubs were involved in efforts to mitigate the impact of the Covid-19 pandemic. In the **Usher Institute**, the team led by Professor Aziz Sheikh in the **EAVE II** project used large datasets to demonstrate world-first results of the effectiveness of vaccines, and the lesser severity of the Omicron variant.
- In Adoption, the **National Robotarium** began a strategic partnership with Tata Consulting, which focuses on applied engineering and joint research across multiple disciplines, including soft robotics, field robotics, and tele-operations.



## 4. The Deal – summary of progress

- In Data, the **Edinburgh International Data Facility** has secured two critical public sector collaborations. Research Data Scotland was established in partnership with Scottish Government and Public Health Scotland, to unlock data for research by providing platforms, policies, and approaches; and Scottish Government’s SPACe service for data analytics builds on the results of the initial analytical workbench proof-of-concept.
- In Entrepreneurship, the **Bayes Centre** hosted the sixth cohort of the **AI Accelerator programme**. Companies from previous cohorts have raised significant amounts of funding. Carcinotech, a cancer research company manufacturing 3D printed tumours using patient-derived cancer stem cells, recently raised £1.6m for internationalisation. The founder is the Scottish Female Entrepreneur of the year 2022, Ishani Malhotra.
- The **Easter Bush Agritech Hub** secured the Biotechnology and Biological Sciences Research Council Campus Innovation Account for three years after a successful partner-researcher collaboration model, and Roslin Technologies and the CEO of Cytochrom won the Life Sciences Scotland Awards.

The first phase of the DDI Programme comes to an end in 2023/24 with completion of the last two Hubs, the Usher Institute and Edinburgh Futures Institute.



Located in the iconic Royal Infirmary Hospital from the late 19th century, the **Edinburgh Futures Institute (EFI)** is the largest of the Hubs and will become a new landmark in the city centre. EFI is the home base for five of the 10 DDI industry sectors with the broadest educational programme of the Hubs, bringing people, data, and diverse disciplines together in an open, ‘what-if’ environment.

In the next phase of the DDI Programme, the six Hubs will join forces as an externally facing innovation platform, housing expertise and facilities to help researchers, companies and public sector partners collaborate and innovate using data. The focus is shifting towards solidifying integrated ways of working, external engagement for economic growth, and delivering benefits and impact. The strategy, governance, and delivery methods will be fine-tuned to implement this effectively.

Building upon the successful relationships nurtured through the delivery of the City Region Deal, in 2022 the DDI Programme Office supported regional partners to complete the Regional Prosperity Delivery Framework.



## 4. The Deal – summary of progress

### Bayes Centre

This academic year saw the fifth anniversary of the opening of The Bayes Centre. A programme of post-pandemic recovery has ensured that Bayes continues to be a vibrant hub of activity bringing together academics, industry, and public sector to deliver the key objectives of the City Region Deal pertinent to the DDI Programme.

Bayes is now well-established as a destination of choice for cutting-edge digital organisations across industry and the public sector that want to benefit from a set of tailored programmes around the main axes of TRADE (Talent, Research, Adoption, Datasets, and Entrepreneurship) to drive their growth.

In 2022/23, we saw major new partnerships with industry (NatWest Group - jointly with EFI - and Cisco) and the growth of existing ones (Huawei) being agreed in collaboration with schools and other DDI Hubs. These partnerships create new opportunities for joint translational research into and adoption of the latest technologies being developed at The University of Edinburgh. Furthermore, Bayes is now consolidated as the reference DDI Hub for Entrepreneurship with our incubation and acceleration programmes oversubscribed and receiving applications from some of the best start-ups around the globe.

A fruitful partnership with the public sector has allowed us to grow and consolidate our non-traditional education offering aimed at upskilling the workforce, which, along with the previously highlighted activity, will drive the creation of more and better jobs in Edinburgh and South East Scotland.



Innovation Fellows



Bayes Centre Community Event lightning talks



Bayes Centre Community Event: Start-up Funding



Venture builder incubator showcase



## 4. The Deal – summary of progress

### Headline achievements in 22/23

- **Bayes Entrepreneurship: AI Accelerator** and **Venture Builder** Incubator programmes delivered successful showcases in March with over 360 people attending including 20 investors. Funding secured for the return of a face-to-face **EIE Investor Showcase** in 2024, which will reinvigorate engagement with the global tech investor community post-pandemic.
- **Bayes Innovation and Adoption:** Major partnerships with industry for multi-million-pound joint translational research and adoption programmes:
  - Agreement reached for the creation of a Bayes Huawei Fellows programme
  - NatWest group partnership announced in collaboration with the Edinburgh Futures Institute
  - Establishment of a Cisco Centre of Excellence in partnership with the School of Informatics.
- **Bayes Education:** Strong recruitment figures for **Data Upskilling Short Courses** with 1,268 enrolments across 43 courses (around 70% increase on last year) and Data Science, Technology & Innovation postgraduate programme delivering £662K of tuition fee income in 2022/23.
- **Bayes Community:** 33 co-located Members and Partners with a growing community of virtual collaborators via new hybrid model. 33 community activities hosted to support engagement with key stakeholders. High profile visits from Scottish, UK, Europe, and US Government representatives, as well as technology major companies.
- **Bayes Research:** Launch of new **Bayes Innovation Fellows programme** providing training and funding to support academic commercialisation efforts of high-value research.

### Next milestones

Due Date	Milestone
Oct 23	<b>Bayes Innovation Fellows</b> programme fully operational.
April 24	40 new start-up and scale-up propositions supported via Bayes Entrepreneurship portfolio programmes
July 24	Over 600 student registrations on Bayes coordinated PGT and Data Upskilling programmes
July 24	Over £1M of Bayes-led adoption income

### Strategic added value

1. Sponsorship of Data Upskilling Short Course enrolments for people in employment in the City Deal region (and the rest of Scotland).
2. Strong support infrastructure for entrepreneurial activity and technology ecosystem in the City Deal region going from idea incubation to investor showcase.
3. Over 30 community events supporting the local ecosystem of academics, entrepreneurs, and companies driving interactions and collaboration.



## 4. The Deal – summary of progress

### Easter Bush

Nucleated at the Royal (Dick) School of Veterinary Studies' Easter Bush Campus – Europe's largest concentration of animal science research expertise – the Agritech Hub is a dynamic and vibrant innovation environment. World-class facilities equipped with the latest technologies support Europe's largest concentration of animal science research experts and clinicians, as well as co-located industrial partners in our custom-built Innovation Centre.

The Easter Bush Agritech Hub continues to leverage existing world-class research institutes and commercialisation facilities to place Easter Bush as a global beacon of Agritech excellence by fostering collaboration between researchers and companies to contribute to global food systems, work towards net zero carbon in the Agritech sector, and inform food and environmental policies. Experts use data to develop genetics and health innovations for agricultural science and business, and to build initiatives and novel systems to improve production traits and other variables within food systems. The research engages with innovative areas, such as data-driven breeding and aquaculture, to enable data generation and analysis that will improve the agriculture industry worldwide. The DDI investment continues to transform the scale and impact of agricultural technology in outputs from teaching, research, and innovation. The executive education address skills shortages and gaps in the industry, with a postgraduate offer encouraging graduates to set up or join micro-agritech companies.

The Agritech Hub facilitates an interactive community that brings together researchers from the University of Edinburgh and other higher education institutions, along with commercial, public and third sector organisations, in collaboration with project partners.





## 4. The Deal – summary of progress

### Headline achievements in the past year

- Securing **five-year strategic investment from the Biotechnology and Biological Sciences Research Council (BBSRC) for the Roslin Institute**. This investment recognises Roslin as a UK-wide resource for pioneering Animal Bioscience, and is associated with £8m per-year strategic funding for 2023-28.
- Spinouts **Roslin CT** and **Roslin Technologies**, along with Dr Kate Cameron of biotech startup **Cytochroma**, all **won in their categories** in the annual Scottish Life Sciences Awards on 17 March 2023. Roslin Technologies continue to gain recognition for their work in alternative proteins; recent examples include hosting a delegation from Scottish Development International to showcase facilities and discuss the future of cultivated meat.
- Roslin expertise has **contributed to the UK and Scottish Government response to avian flu**. Researchers have formed part of the Scottish Avian Flu Taskforce and UK Government DEFRA Highly Pathogenic Avian Flu Taskforce. The **science continues to deliver the latest research in this field** with the Institute's scientists participating in interviews to raise awareness about avian flu and its impact with the **Financial Times**.
- Prof Dominic Moran, Dr Rafael Silva and Dr Mike McGrew's research in the **IMAGE** project has been used to inform new **guidelines** in cryoconservation of animal genetic resources.

- COVID-19 research continues to contribute to **new understanding in the genetic factors involved**.
- Researchers have been part of a group of universities which **collaborated on a research strategy to respond to major challenges faced by the agriculture sector**.

### Next milestones

- Taking a leading role in the animal component within the UKRI Precision Breeding Mission Hub for Food Systems. The formation of this hub will enable a nationally recognised engineering biology hub for food systems, consolidate and strengthen partnerships with other UK partners (other institutes and industry). This considerably enhances the hub's precision breeding capabilities to remain at the forefront of agricultural science and innovation.
- Launching a new Roslin Innovation Centre Field station. New agriculture space has been secured in nearby Dryden Farm, which will facilitate the attraction of new agriculture-based tenants to the region.
- Building of a new veterinary First Opinion Practice. This will provide the next generation of vets with a learning experience fit for the future, ensuring greater opportunities for first-opinion clinical practice material for teaching students and, crucially, a dedicated programme centred on the financial and practical business skills our graduates need to thrive. This will expand access to first opinion facilities to the Midlothian areas, as well as enable expanded outreach and research opportunities accordingly.



## 4. The Deal – summary of progress

### Strategic Added Value

- An independent **Benefit Impact Assessment** of the first five years of Roslin Innovation Centre (RIC) was released in Jan 2023: RIC has delivered qualitative benefits, including establishing an entrepreneurial and innovative culture, enhancing the Easter Bush Ecosystem and enabling tenant companies to access research grant and inward investment funding. Many tenants said their location within the Easter Bush Hub was influential in securing research grants, and approximately half of those interviewed felt it had helped them secure private investments. Since taking up occupancy, tenant companies have received, on average, one or more investments totalling over £100k - this includes several examples of inward investment from outside the UK. Tenants also believed there were 'plentiful' opportunities for further collaboration within Roslin Innovation Centre. The review found clear evidence of positive engagement with schools, colleges, the wider Midlothian community, and the Edinburgh area by Roslin Innovation Centre tenants. It was argued that the most reasonable estimate was an economic return equivalent to £2.86 for every £1 invested (a return of 286%). In addition to economic growth, the report specifically evidenced the impact on regional job employment and regional growth.
- **Independent analysis** was undertaken on the Roslin Institute which details economic contribution of Roslin Institute to the local, national and global economies. Research carried out at the Roslin Institute contributed almost £20 billion to the global economy in 2019/20, largely through productivity improvements in agriculture and aquaculture, according to an independent economic analysis. This figure includes a contribution of almost £325 million to the UK economy, more than £80 million to Scotland and almost £50 million to the local economy, according to the report from BiGGAR Economics, published in 2022. Their report finds that Roslin's work supports more than 1600 jobs worldwide, including 1325 in the UK and more than 1000 in Scotland. For every £1 of public funds received, Roslin generated £3.40 in Scotland and £13.50 for the UK.





## 4. The Deal – summary of progress

### Edinburgh Futures Institute

One of six data driven innovation hubs at the University of Edinburgh and Heriot-Watt University. It is part of a regional powerhouse for collaboration and data innovation with industry partners.

The creation of an entrepreneurial campus, supporting a thriving innovation ecosystem is well underway. It includes the co-location of research centres, civic and commercial partners alongside students, and will support the creation of at least 90 new companies. The Futures Institute is fast becoming a data-driven, co-creative innovation hub at the heart of the University of Edinburgh and the city region.

Interdisciplinary postgraduate, undergraduate and professional and lifelong study supports data driven innovation and is equipping students with the critical leadership, data and creative skills needed in a fast-changing world. Flexible and inclusive fusion study enables online and on-campus learning, and is increasing opportunities for a diverse student body to gain and apply knowledge to live projects and real-world challenges.

The Institute’s research culture consolidates the University of Edinburgh’s leadership in Data-Driven Innovation research and is delivering impact through the generation of over £170 million in research income. The Futures Institute is developing research capacity by supporting the incubation and growth of interdisciplinary clusters and centres.

The Futures Institute is establishing major partnerships through four key sectors: Financial Services (including Fintech), Creative Industries, Tourism and Festivals, and Public Services (including Data Civics), and co-creating projects that deliver



Tour of the new Futures Institute with Humza Yousaf, First Minister of Scotland, Sir Peter Mathieson, Principal of the University of Edinburgh and members of the project team (May 2023)  
*Photo:Neil Hanna*



meaningful impact derived from world-leading research.

The Institute becomes a physical reality with the opening of a newly-restored building in the heart of the central University campus. A phased entry to this Edinburgh landmark will open to students in September 2023, and research teams and partners in 2024.



## 4. The Deal – summary of progress

### Headline achievements in the past year

Sep 22: The Futures Institute welcomes its first cohort of postgraduate taught students on six different degree programmes. A further four postgraduate programmes open for recruitment and the undergraduate Interdisciplinary Futures degree opens for applications for autumn 2023.

Dec 22: Art and Humanities Research Council **Programme on Responsible AI** led by Professors Shannon Vallor and Ewa Luger. Edinburgh Futures Institute researchers will lead a project to ensure AI and data are used responsibly and ethically across society and industry.

Apr 23: The Futures Institute launches its second public events programme with ‘Love Machine Spring 23’. Hybrid format events featuring the Edinburgh Futures Conversations and 25+ events focused on the intersection of human experience and artificial intelligence, in partnership with the University of Edinburgh’s Celebrations of 60 Years of Research in Computer Science and AI. **Watch recorded events.**

Jun 23: Building on the success of the **Creative Informatics cluster, University of Edinburgh announced as a core partner** in £50m CoSTAR Programme. A technology and data-driven Network Lab that will – in collaboration with Codebase, the UK’s largest technology incubator – deliver innovation and enterprise across two centres in Dundee and Edinburgh

Jun 23: **Launch of the Centre for Purpose-Driven Innovation in Banking**, a new partnership with the NatWest Group, the Bayes Centre and Edinburgh Futures Institute, to improve how data is used to benefit bank customers, students, researchers and policy makers.

### Next milestones

Due Date	Milestone
Sep 23	Welcome postgraduate and undergraduate students to the newly-restored Edinburgh Futures Institute building on Lauriston Place.
Oct 23	Autumn 2023 public event season ‘Power Trip’ including Edinburgh Futures Conversations events on Future of Leadership.
Oct 23	Final three postgraduate ‘fusion’ degrees open for recruitment 2024 entry, bringing the postgraduate portfolio to 13 programmes.
Feb-Mar 24	Continued phased opening of the Futures Institute building to staff, tenants and partners.
Spring 24	The Police Scotland and Public Health Scotland ‘Prevention Hub’ will be located in the Futures Institute, with a focus on reducing inequalities to improve health and wellbeing, developing a sustainable and innovative ‘prevention’ ecosystem, utilising evidence-informed action around key prevention challenges.
Apr 24	Public events programme opens building to the public with series of events focused on the future of education.



## 4. The Deal – summary of progress

### Edinburgh International Data Facility (EIDF)

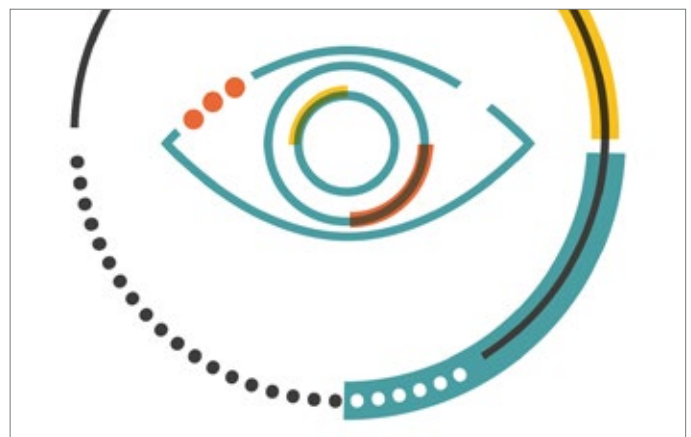
Achieving the aims of the DDI initiative requires a powerful, high-capacity, and flexible data infrastructure capable of responsive and secure delivery of an ever-expanding range of complex and bespoke data and analytical services. These activities also demand a level of service (e.g. resilient to the loss of power, redundancy of equipment to mitigate the impact of sudden failures) that is not normally required for research computing applications and was not supported by previous facilities.

The EIDF City Region Deal investment was made up of four complementary components:

- **EIDF computer room:** a new high resiliency computer room (CR4) at the EPCC's Advanced Computing Facility in Midlothian, to complement the pre-existing three computer rooms, focused on supercomputing system provision for research users;
- **Data and software Infrastructure:** the underlying Data Science Cloud computing and data infrastructure to support the DDI initiative. As part of this component open source, and paid-for advanced data analytics, compute and other software infrastructure is being deployed;
- **Internet of Things (IoT) Service:** a regionally focused IoT network is being deployed across the City Region area, supporting both school-pupil engagement, as well as wider research and industry development; and,
- **Regional Data Haven:** the capacity for a regional data repository, with data provided by City Region Deal Partners, created to support a smart data generation infrastructure, aligned to work at a national level, such as Research Data Scotland, COG-UK, the Smart Data Foundry, and the Regional Health DataLoch Service.



Edinburgh International Data Facility





## 4. The Deal – summary of progress

### Headline achievements in the past year

EIDF’s focus in 2022/23 has been on the development of novel data and analytical services. Progress has been good in both general-access services and project-based services for DDI partners and stakeholders, with an emphasis on Trusted Research Environment.

There has also been a steady stream of regional companies, and some from wider afield, seeking access to EIDF expertise and resources, including; **DanuRobotics, Smartr AI, Black Goblin Audio, BoCreate**. In addition, a range of companies have been engaging with the **Data Slipstream project** on earth observation data, including: **Mercury Environmental Systems, AstroSat, EarthBlox, Intelligent RealityTM**, and **Environment Systems**.

The IoT Service has seen significant maturing of its Schools Outreach Programme, as well as a number of high-profile projects delivered.

You can view the **EIDF’s Service Catalogue here**.

Due Date	Milestone
Oct 22	The Cerebras CS-1 service was upgraded to the <b>Cerebras CS-2</b> machine, enabling work on Large Language Model research.
Oct 22	The <b>Outbreak Data Analysis Platform (ODAP) Trusted Research Environment (TRE)</b> , co-designed with HDR-UK, Public Health Scotland, Scottish Government and Roslin Institute through ODAP Partnership was launched into operation.
Dec 22	The ingest of Covid19 Genomics-UK (COG-UK) Consortium and NHS Digital data into the <b>Outbreak Data Analysis Platform Trusted Research Environment</b> was completed, supporting this society-focused research.
Aug 22	The <b>EIDF Data Science Cloud</b> was made available for general use. The service has since grown to over 8,500 virtual CPUs and 62 TB of RAM and is in use by Scottish Government and other EIDF research users.
May 23	The first version of the <b>genomic data management and analytics service</b> for the Institute of Genetics and Cancer (with Cambridge-based Zetta Genomics), run using OpenCGA, started undergoing user-acceptance testing.  The first version of the Battery Data Hub, a data management and analytics service for battery data, funded by the UK Faraday Institute, was made available to the School of Maths and external collaborators Imperial College, Oxford University and RWTH-Aachen.
May 23	Started working with the <b>National Centre for Arial Photography (NCAP)</b> - an agency within Historic Environment Scotland - exploring novel methods to assist in the digitisation of their photographic archive, to support research and commercial use.
May 23	The <b>alpha Battery Data Hub</b> , a data management and analytics service for battery data, funded by the UK Faraday Institute, was made available to the School of Mathematics, and external collaborators Imperial College, Oxford University and RWTH-Aachen. This is supporting research into optimisation of battery management, an increasingly significant issue, in the transition to Net Zero.
Jun 23	The first <b>tenant was migrated from the former Safe Haven infrastructure to the new EPCC Trusted Research Environment (NSH2.0)</b> service. This has seen investment in new hardware and significant automation, whilst retraining the secure operation required of a TRE.



## 4. The Deal – summary of progress

Due Date	Milestone
Jul 23	The <b>Artificial Intelligence Compute service</b> was launched for general use by researchers. This includes a cluster of 160 Nvidia A100 Tensor Core GPUs that enable deep learning with an extremely high bandwidth, enabling significant benefits in performance for AI research and development.
Jul 23	<b>IoT in Schools outreach programme</b> – this is now active in over 40 primary and secondary schools from all six Local Authorities in the South East Scotland region. The pupils have fully embraced the technology even installing one of their sensors in the crocodile enclosure in a zoo in Fife. All local authority schools in West Lothian will be active at the start of the next school year from August 2023, with full rollout to the other LAs expected to quickly follow. We are also now supporting an operational pilot of indoor environmental monitoring in Midlothian schools.
Jul 23	<b>Smart IoT Campus services</b> – these continue to develop, including building occupancy monitoring, maturing this monitoring for University Estates' investigation into building utilisation and hybrid working. SeNSES has also been further developed to improve the data captured within central Edinburgh for finer resolution monitoring of air quality and pollution, deploying over 40 new particulates sensors across the city.
Jul 23	<b>Smart IoT Tourism services</b> – ongoing delivery of outdoor park monitoring for vehicle and people counting and capacity management, migrating East Lothian Council's coastal carpark monitoring pilot to a recurrent service,

### Next milestones (2022/23)

EIDF will continue its focus on a combination of generic service development and bespoke project support. Its operating model is to engage with stakeholders on DDI projects using existing EIDF services and infrastructure, identify commonality and synergies between projects and from these develop new generic services. This approach has proven successful to date.

In addition, EIDF will be working with the other DDI Hubs to develop Data Strategies for each Hub. For the IoT Service, looking forward important new relationships with external organisations are being developed to that enable delivery of significantly improved coverage for our LoRaWAN-based SeNSES regional sensor network, and to build out our engagements to meet the needs of the utilities industries in the adoption of IoT. Activities are also aligning with the City Region Deal Regional Prosperity Framework, to support the development of its future projects.

Finally, work will continue on securing the Edinburgh and South East Scotland City Region as the hosting location for the UK's first Exascale HPC system, further cementing the Region's Digital, AI, and data reputation.



## 4. The Deal – summary of progress

### Next milestones (2022/23)

Due Date	Milestone
Oct 23	The <b>Cerebras CS-2</b> service upgraded to a two-machine cluster, to further enable work on Large Language Model research.
Oct 23	<b>Graphcore IPU-POD64 system</b> brought into service within the EIDF, to provide additional novel compute capability to support AI research and development
Dec 23	<b>Joint Data Strategy</b> developed for the Edinburgh Futures Institute with EPCC, to support its TRADE activities.
Dec 23	<b>Preparation of CR4</b> for developments to support future hosting of a UK Exascale HPC System
Dec 23	Working with UKRI and EPSRC on the development of the <b>Business Case for Exascale</b> , to be hosted in the Edinburgh and South East Scotland City Region, progressing to a UKRI-led Procurement of the system
Jan 24	<b>IoT-enabled Care Testbed environment</b> , for use by the Advanced Care Research Centre, in place and being used.
May 24	<b>Data Catalogue for EIDF</b> available for engagement (reporting data assets accessible)
Jul 24	<b>Galleries to Calories</b> - a high profile project involving many institutions examining the feasibility of establishing a geobattery to provide a district heating mechanism based on excess heat production from the Advanced Computing Facility cooling system propagating heated groundwater through the extensive coal mine shafts which percolate the area around Roslin and Bilston. The IoT Service is providing extensive water and environmental monitoring to support the project.
Jul 24	<b>Phenoweb</b> – a pilot project to instrument two of the existing Phenoweb ecology sites to measure plant growth factors and biodiversity in real-time. This pilot will deploy IoT Service-developed bioacoustic sensors, now capable of determining both bat and bird species present in the surrounding environment.
Jul 24	<b>Longitude Prize for Dementia</b> – in partnership with the School of Engineering at the University of Edinburgh, the IoT Service will build out a testbed environment with the sensors and IoT infrastructure to support the development of prototype Smart Care services, in particular the application of acoustic monitoring devices to support individuals with health conditions living independent lives at home.
Aug 24	On-going <b>industrial use</b> of EIDF, and wider EPCC Compute facility for pre-commercialisation
Aug 24	A range of Schools across the CRD Region using live <b>IoT in Schools Service</b>



## 4. The Deal – summary of progress

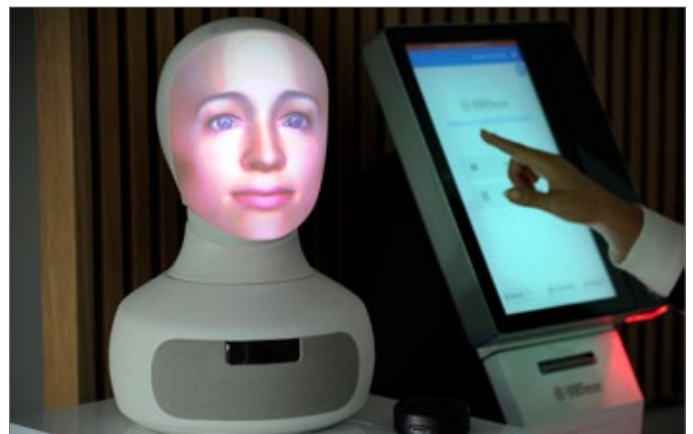
### National Robotarium

The National Robotarium is a world-leading centre for Robotics and Artificial Intelligence. Its responsible and collaborative approach creates innovative solutions to global challenges. Its pioneering research moves rapidly from laboratory to market, developing highly skilled visionaries and delivering substantial benefits for society. Its ethos is People centred; Intelligence driven.

This facility translates cutting-edge research into technologies to create disruptive innovation in an expanding global market in robotics and autonomous systems, delivering sustainable economic and societal benefit to the city region, Scotland, the UK, and globally.

As global leaders in Robotics and Autonomous systems, Heriot-Watt University and the University of Edinburgh explore collaborative interaction between humans, robots and their environments at all levels. The National Robotarium is leveraging existing research and the needs of UK industry to meet the significant market opportunity of Robotics and autonomous systems. Building capacity across complementary areas of embedded intelligence and expert systems, the National Robotarium is linking to other UK and international research locations to attract further inward investment.

The £22.4 million purpose-built centre, opened on 28 September 2022, with unrivalled facilities supporting Robotics and Autonomous Systems, Human and Robotic Interaction, Environmental testing, accelerated life testing, Robot design and development as well as facilities for incubation of Robotic and AI based start-up companies.





## 4. The Deal – summary of progress

With a strong focus on entrepreneurship and job creation, the National Robotarium is offering an ecosystem for industry collaboration where humans and robots work in partnership.

Most importantly The National Robotarium is reaching out to schools, colleges, businesses, and the public at large, to raise awareness and understanding of Robotics and AI including its application to future lives of all UK citizens.



### Headline achievements in the past year

- The National Robotarium officially opened on 28 Sept 2022.
- Five resident start-up businesses now in place, providing 50+ high skilled jobs.
- The National Robotarium now employs an engineering and operations team of 30.
- First financial year of operation will see a turnover of £1.8 million.
- Four research grant funded activities now underway in the facility.
- Eight commercially-funded projects now running in the facility.
- Partnership with Tata Consultancy Services (Worldwide) in place.
- Partnership with Fourier Intelligence in place.
- Impact Acceleration Account (IAA) funding received for Industry partnership with Fugro.
- Three additional partnership agreements with other companies.
- 4000-5000 schoolchildren have visited, toured and held workshops at The National Robotarium.
- Sectors engaged include: Agriculture, Construction, Health, Pharmaceutical manufacturing, Utilities companies, Aerospace, Fisheries, Social care, Renewable energy.
- Scottish Government support for discussions to establish a Robotics Cluster started.

### Next milestones

Due Date	Milestone
Sep 2023	All construction phases closed and agreed with Contractor.
Oct 2023	4G Inbuilding solution commissioned and operational.
Mar 2024	All Latest generation Robotic assets in place – DDI Grant drawdown complete.
Apr 2024	Industrial training offering publicised and available.
Jun 2024	Complete development of outdoor facility for testing, operation and accomodation of outdoor robotic assets.
May 2024	Digital enterperise implemented.
Aug 2024	Decision on Robotics cluster implementation.





## 4. The Deal – summary of progress

### Strategic Added Value

The development of the National Robotarium is aligned with the strategic focus of both Universities and with the Data-driven innovation theme. The core strategic focus of Heriot-Watt University is:

Strengthen research intensity in fields of economic and societal benefit; Provide truly global education while maintaining our Scottish roots; and deliver excellent student experience and highly employable graduates.

The National Robotarium is actively identifying opportunities with our colleagues across the DDI programme. These examples include:

- with Bayes Centre: joint activities in Robotics and Autonomous systems across the University of Edinburgh and Heriot-Watt University, and both DDI hubs, including joint events, funding applications and support to start-up businesses.
- with Edinburgh Futures Institute: to develop CPD and other talent offerings on ethics in robotics.
- with the Usher Institute: development of joint offerings for funding
- with the Edinburgh International Data Facility: for computing needs and advice and support

During the procurement and completion of the National Robotarium main construction contract, the focus has been on the delivery of an ambitious Community Benefits plan with agreed KPIs on variety of areas including youth and school engagement, work placements and job creation within an inclusive growth approach.

Public Engagement is now an integral part of the ongoing approach at The National Robotarium. By actively embedding this into the work programme, the skills and attitudes of all those taking part will be enhanced and the research will be socially conscious and relevant.

The vision is to create a sustainable programme of engagement focused on robotics and artificial intelligence, putting audiences at the heart of the offering through increased public understanding and critical appreciation of robotics and AI. The National Robotarium will be fully engaged in policy making on robotics and AI, from ethics to standards and public understanding.



## 4. The Deal – summary of progress

### Usher Institute

Through the application of data science, the **Usher Institute** is driving innovation in health and social care that improves lives. It will establish a world-leading innovation hub where public, private and third sectors can collaborate to enable data-driven advances in the delivery of health and social care.

The Usher Institute works with people, populations and their data to understand and advance the health of individuals and populations in the community and beyond. It supports the use of data and digital technologies to improve outcomes for patients and encourage the adoption of those with the greatest potential to transform health and social care.

The activity will deliver the infrastructure, resources, and expertise essential for the data-driven transformation of the health and social care sector in the City Region and beyond. This includes the creation of high-quality education and training in the application of data skills within health and care; a unique regional data service, **DataLoch**, as a foundation innovation asset; and a membership-based innovation community bringing together service, academic and industry interests to collaboratively develop solutions to our most pressing health and social care challenges.

Innovation and commercialisation will be embedded at the heart of Scotland's premier academic medicine campus with a new, bespoke home opening at **Edinburgh BioQuarter** in early 2024.



Usher Institute



A panel session at Digital Health and Care Scotland 2022, held on 23 February at Dynamic Earth on Ageing and Frailty. Pictured is Nick Mills closing the session, with a presentation on the Usher Institute and data-driven innovation activities.



Topping out ceremony for the new Usher Institute building attended by the Lord Provost.



## 4. The Deal – summary of progress

### Headline achievements in 22/23

In the last year, Usher's health and social care hub has continued to mature in its approach to collaboration and innovation, ensuring that communities in Scotland and beyond benefit from secure access to data for research and an array of educational programmes to ensure our workforce can interpret and innovate with that data.

The Talent team has established a portfolio of high-quality learning and development opportunities to support the needs of multiple stakeholders including health and social care professionals, Scottish Government, NHS Scotland, third sector and industry. The Institute has successfully enabled and support data-driven innovation in health and social care to improve outcomes for individuals, communities, and populations. To date, it has upskilled over 2,000 students.

In its earliest iteration, **DataLoch** provided access to specific data extracts for academic researchers and health and social care managers. After working in partnership with NHS Lothian to agree an appropriate governance framework, DataLoch's full launch in July 2022 allows approved researchers from third- and private-sector organisations to apply for secure data access. Putting data at the centre of responses to health and social care system challenges is critical to improving services through research, innovation and service management.

As a programme, Usher's hub has established strong partnerships across the Scottish Government and the NHS, which has contributed to the development of governance and data-sharing protocols for Scotland's mature and world-leading health

data assets and ensured that discussions about health data include a focus on innovation and collaboration to deliver the best outcomes for our community.

The Talent programme launched three new Masters' programmes in Data Science for Health and Social Care, Epidemiology and Leading Digital Transformation in Health and Care for Scotland. It also offers 40 stand-alone postgraduate professional development (PPD) courses and a newly launched continuing professional development (CPD) programme. The Institute has successfully enhanced the undergraduate medical degree through the creation of BSc/BMedSci courses in Data Science for Health and Biomedical Sciences. This will prepare graduates for a career in data-intensive healthcare.

In collaboration with the **Bayes Centre** and through the Scottish Funding Council upskilling fund, fully funded places through the '**Data Upskilling Short Courses**' are offered - a wide portfolio of short stand-alone courses targeted to working health and social care professionals across Scotland. The most popular Health Data Science course has upskilled over 50 students in the region.

DataLoch brings together primary and secondary health data for the region, works with experts to understand and improve this data, and provides secure access for academics, clinicians and innovators to help solve important challenges. The use of data has supported projects associated with more than £6.5m in research revenue for the University.



## 4. The Deal – summary of progress

DataLoch is a critical part of the **Wellcome Leap** funded innovation collaboration to enhance support for emergency cardiac care clinicians in Scotland. This is a partnership that includes the University of Edinburgh, Edinburgh Napier University, NHS Lothian and Lenus Health, where DataLoch has brought together relevant data from across primary and secondary care settings, to train an artificial-intelligence model to support clinicians with early-diagnosis when faced with patients with acute chest pain or breathlessness.

### Next Milestones

The opening of the Usher building in early 2024 sets the stage for the establishment of a dynamic innovation community in which academics, public, private and third sectors collaborate to enable data-driven advances in the delivery of health and social care. The event series will draw speakers and audience members from across the community to participate in conversations about data-driven innovation in health and social care.

DataLoch will incorporate social care data, working with experts to understand and improve data from disparate sources, ultimately driving toward further linkages between primary, secondary and social care data which will improve health in communities across Scotland. Talent will expand the short courses offering using the new **University Short Courses** online learning platform. A bespoke training service for stakeholders with a focus on industry partners will be offered, and professional accreditation routes linked to regulatory bodies for masters programmes and short course portfolio will be sought.

### Strategic added value

The institute is working with the **Edinburgh Clinical Trials Unit (ECTU)** team to create a path towards data-enabled clinical trials using routine data from DataLoch, ultimately resulting in economic benefit as South East Scotland is positioned as a leader in clinical trials. A new CPD and PPD course in data-enabled clinical trials will be launched to further ensure that the skills to deliver these trials exist.

Through a senior leadership programme for digital transformation in health and care for Scotland, which is funded by Scottish Government, led by NHS Education for Scotland, and delivered by the Institute's Talent team, a new masters level programme has been launched to develop a new generation of leaders who can drive, deliver, and embed digital transformation across Scotland's health and care services.

DataLoch supports NHS Lothian with service improvement in priority areas. This includes a project working with a group of GPs in North-East Edinburgh to design an automated report which flags when patients are considered frail and helps health professionals support those at highest risk of coming to harm. This includes reviewing medication prescriptions to help reduce the risk of falls, arranging rehabilitation services like physiotherapy to keep people active, and supporting people who develop memory problems. The automated report tracks performance over time and shows where progress is being made and where more work is needed. It also allows GP surgeries to compare their performance against other practices, to try to ensure frail patients receive the same standard of care across the area.



## 4. The Deal – summary of progress

### Edinburgh Innovation Hub

East Lothian Council and Queen Margaret University are delivering, in partnership, the Edinburgh Innovation Hub. The Edinburgh Innovation Hub (“Hub”) is in a prime strategic location next to the QMU campus on East Lothian Council owned land and is a catalyst for the subsequent development of a wider Edinburgh Innovation Park (“EIP”).

The state-of-the-art Hub is a flexible 7,200 sqm GIA for the food and drink sector in Scotland, located directly adjacent to, and supported by Queen Margaret University – a university that is leading on international research in Dietetics, Nutrition and Biological Sciences.

The Hub will drive company growth, supporting and developing existing businesses and creating sustainable new businesses to access a global market for healthy and functional food. The development will allow Queen Margaret University, along with businesses, to form and grow a business sector that will harness the potential of translational medicine in food and drink and contribute to the wider health agenda. This will in turn support the diversification of the food and drink industry towards preventative, therapeutic and rehabilitative applications of expertise in genomics of food and drink sector. The EIP will be developed over time and create a nationally significant centre of knowledge exchange, innovation and high value business growth.



Edinburgh Innovation Park Masterplan





## 4. The Deal – summary of progress

### Headline achievements in the past year

Date	Milestone
Sep 22 to Jan 23	Detailed design of the Hub finalised
Feb 23	Planning Application for the Hub submitted
Jun 23	Procurement of the contractor commenced
Aug 23	Planning consent granted

### Next milestones

Due Date	Milestone
Sep 23	Appointment of the contractor
Nov 23	Commencement of construction of the Hub

### Strategic Added Value

- The Hub forms a key part of an ecosystem of Innovation themed projects promoted by the Edinburgh South East Scotland City Region Deal.
- The whole project will contribute to job density improvement for the wider city region by making available infrastructure/construction opportunities and employment opportunities within the Innovation Hub and the EIP.
- The Hub will generate job opportunities in the sector for those highly skilled graduates both through the innovation led growth of the businesses located there, and through providing access to the space, facilities and services for food and drink graduate start-up companies.
- Ongoing collaboration and partnership working between East Lothian Council and QMU.
- Community Benefits such as internships, work placements, apprenticeship opportunities



## 4. The Deal – summary of progress

### Fife Industrial Investment Innovation

The Fife Industrial Innovation Investment (i3) Programme is a £50 million, ten-year programme delivered by Fife Council.

The investment is delivering new business premises and immediately available serviced land. The new business accommodation is located within existing business clusters in mid and south Fife, adjacent to growth corridors (M90 and A92). It aims to facilitate more joint working between the region's universities and Fife businesses, to drive productivity and to deliver higher value, skilled, permanent jobs from data driven innovation.

The new industrial and commercial stock will ensure that Fife's industrial estates provide flexible space for innovative manufacturing industries with cutting-edge digital and energy capabilities. Five sites have been developed in Glenrothes, Kirkcaldy, Dalgety Bay, Lochgelly and Dunfermline during the first four years of the Programme. 6.09 Ha of employment land has been unlocked and site servicing took place at 2 sites to unlock 3.89 ha which is now immediately available for private sector investment, along with almost 3250 m<sup>2</sup> of newly developed business space. The new units are more than 95% occupied.

### Headline achievements in the past year

- Tranche 2 of the Fife i3 Programme is underway.
- Completed 8 new business units at Hillend & Donibristle Industrial Estate, Dalgety Bay.
- Construction started at Fife Interchange North and Levenmouth to create new business units.
- High interest from potential occupiers in these Business Units.



Fife Industrial Investment Innovation





## 4. The Deal – summary of progress

### Next milestones (2022/23)

Due Date	Milestone
Sep 2023	Annual Survey of tenants.
Oct 2023	Complete new Business Units in Levenmouth.
Q3 2023	Planning Application submitted for two new developments at Flemington Road, Glenrothes (refurb project) and John Smith Business Park, Kirkcaldy.
Q2 2024	Complete new business units at Fife Interchange North, Dunfermline.

### Strategic Added Value

The Fife i3 Programme works closely with the Scottish Borders Council to share Lessons Learned and is also engaged with the DDI Programme around Innovation opportunities. These linkages will widen as the DDI Programme moves into its next phase.

Fife Council's strategic inclusive growth priority is the Mid-Fife Area. All the projects in the Fife i3 Programme contribute to inclusive growth. The locations for investment in the first FBC were selected based on these criteria:

- Ability to support strategic business clusters;
- Location / connectivity to strategic growth corridors (M90, A92);
- Fit with existing predominant land use;
- Potential impact on sensitive or incompatible land uses; and
- Potential to deliver lower-cost business space.

The site selection process for Tranche 2 Full Business Case (FBC) included these sustainability criteria:

- Greenfield sites are generally not preferred unless they fulfil other sustainability criteria or make a significant contribution to other strategic objectives.
- Can the site accommodate a passivehaus design, particularly in relation to the orientation of the building to maximise passive solar gain?
- Does the site have access to any renewable energy source (e.g. district heat network, air source or solar power)?
- Will the project remediate vacant and derelict land or property?

Work continues to develop and refine the Programme's approach to sustainable construction on a project-by-project basis.





## 4. The Deal – summary of progress

### Borders Innovation Park

The Borders Innovation Park, situated next to the Borders Railway terminus at Tweedbank, will deliver much-needed high quality business space to the Scottish Borders.

Costing £29 million and being constructed in three phases, the programme is intended to stimulate growth for local businesses and inward investors together with associated job creation.

As with many other rural economies, the Scottish Borders has to overcome the problem of market failure caused by a combination of remote locations and poor infrastructure, a lack of supply of modern business premises and the increasing obsolescence of existing stock.

The first building to be completed in Phase 1 of the Borders Innovation Park opened in July 2022 having been delayed owing to the Pandemic. The IT firm, CGI, has leased one floor in the building while Inspire Learning, a digital learning programme, occupies part of the other floor. Work is continuing to develop road and service infrastructure for the original Phase 3 of the programme.

The Pandemic has also impacted on the programme in that the aspirations to build out speculative office space in Phases 2 and 3 were exposed by changes in market conditions for this type of accommodation. This has led to a review of the planned mix of developments in Phases 2 and 3, which will necessitate a revision of the Full Business Case by December 2023.

In summary, the Borders Innovation Park will greatly enhance the inward investment offer in the Scottish Borders, particularly to high value sectors, as well as assisting existing businesses to improve their competitiveness. It will also help to address inequalities in the area through providing access to better quality, higher paid jobs.



Borders Innovation Park





## 4. The Deal – summary of progress

### Headline achievements in the past year

Due Date	Milestone
Sep 2022	Occupation of first building in Phase 1 by tenants.
Mar 2023	Programme update given to Scottish Borders Council.
Jun 2023	Programme update given to ESES City Region Deal Joint Committee.
Aug 2023	Engagement exercise with businesses, mapping needs to inform development.

### Next milestones

Due Date	Milestone
Sep 2023	Phase 3: Development of road and service infrastructure.
Nov 2023	Submission of revised Full Business Case for Phases 2 and 3 to Scottish Borders Council.
Mar 2024	Submission of revised Full Business Case for Phases 2 and 3 to ESES City Region Deal Joint Committee.

### Strategic Added Value

Scottish Borders Council is working with strategic partners, particularly Fife Council, the University of Edinburgh and Heriot-Watt University, to maximise the benefits of data-driven innovation and its potential to increase the number of innovation-active businesses, both regionally and locally. This work is taking place within the context of both the Borders.

Innovation Park programme and also the relevant strands of the Regional Prosperity Framework.

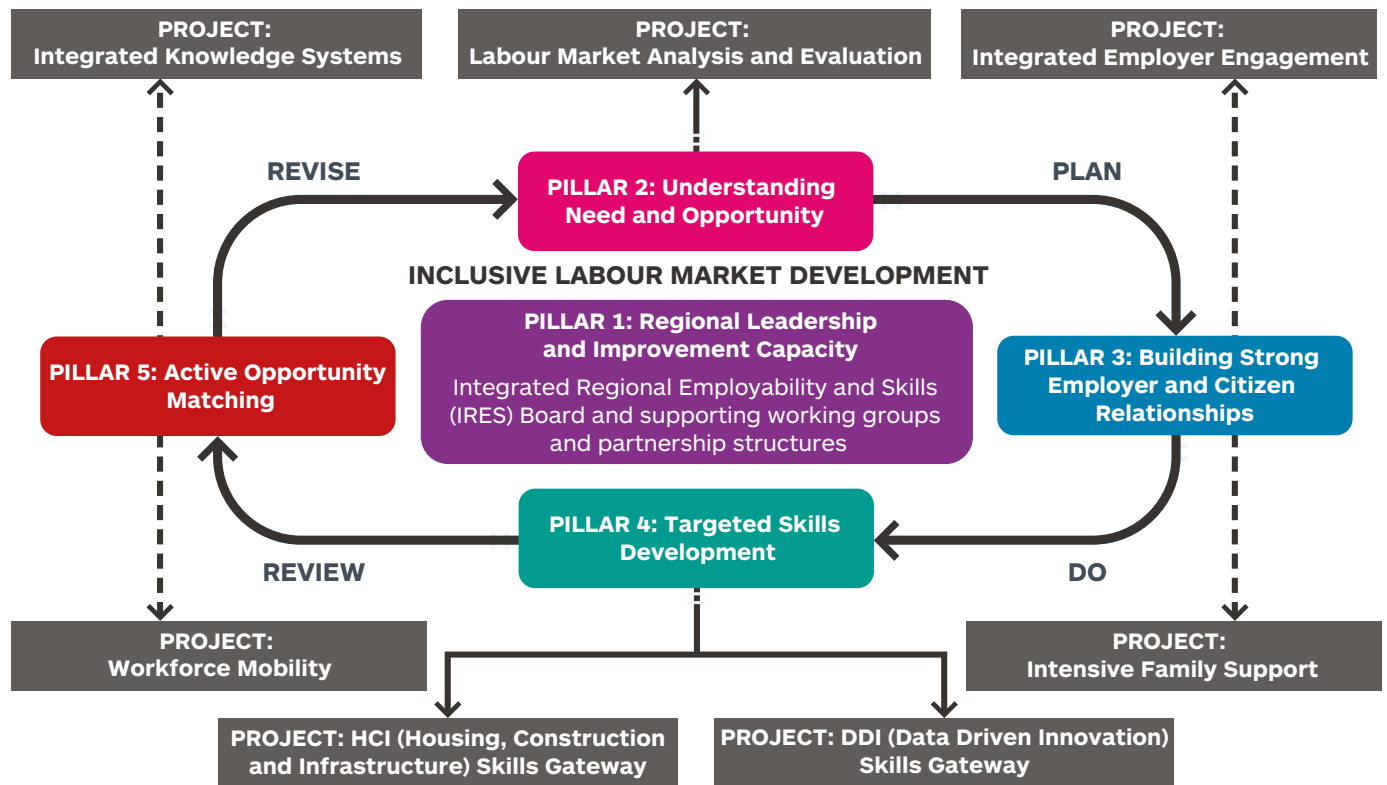
Scottish Borders Council is also working with South of Scotland Enterprise to maximise the business support and advice available to businesses as well as other aspects of the Borders Innovation Park programme. As a participant in the City Region Deal Housing, Construction and Infrastructure (HCI) Skills Gateway, the Council will look to develop new talent through utilising the construction opportunities during the build phases of the innovation park.



## 4. The Deal – summary of progress

### Integrated Regional Employability and Skills

The Integrated Regional Employability and Skills (IRES) Programme and its cross-sector partnership seeks to evolve regional labour market policy and practice to help drive inclusive growth. The programme continues to focus on five improvement pillars targeting known areas of weakness or opportunity.



The IRES partnership is funded by £25 million investment (over eight years) and will deliver an additional 14,700 skill improvements; 5,300 people into employment; and a further 500 career enhancements through its seven themes:

1. Integrated knowledge management systems
2. Labour market analysis and evaluation
3. Integrated employer engagement
4. Intensive family support service
5. Housing construction and infrastructure (HCI) targeted skills gateway
6. Data-driven innovation (DDI) targeted skills gateway
7. Workforce mobility

The IRES programme has already supported over **103,000** people to improve their skills and gain new knowledge through training and/or education and helped over **4,500** people secure employment. An additional **£587m** funding has been secured so far to enhance IRES activity. The IRES programme continues to evolve, streamline, and integrate the region’s employability and skills system to enhance our capacity and capability to drive inclusive growth and create added value for stakeholders.



## 4. The Deal – summary of progress

### Headline achievements in the past year

#### 1 Integrated Knowledge Systems (IKS)

- Capital City Partnership migration of all Integrated Employer Engagement data including C-19, Fort Kinnaird, Community Wealth Building and Employer Fund as well as Edinburgh focused Joined Up for Business, into Helix
- Scottish Borders Council migration into Helix
- **helix.scot** launched



#### 2 Labour Market Analysis & Evaluation (LMAE)

- Delivery of regional analysis of future skills needs for the tourism sector.
- Delivery of regional analysis of future skills needs for the creative industries sector.



#### 3 Integrated Employer Engagement (IEE)

- Developed and launched the **Community Wealth Building Framework for Action and accompanying pledge** commitments for the deal following a consultation with CLES (Centre for Local Economic Strategies). The project engaged with over 6,000 citizens and represented Community Wealth Building at 52 events and 42 leadership forums.
- IEE delivered a pilot Hospitality Academy in February 2023 in partnership with Midlothian-based hospitality business, The Original Rosslyn Inn (TORI). Of the six clients recruited onto the course, 4 moved into employment with a hospitality employer, 3 of which were directly with the host employer and from the Ukrainian community.
- Working in partnership with Balfour Beatty, lead contractor for Edinburgh Futures Institute, IEE funded and developed a Construction Academy for the Ukrainian Community. This project converted the practical construction work experience of the Ukrainian client group into UK regulatory qualifications to support them to progress into work following their resettlement in our region. 13 Ukrainians enrolled on the course. The results for this course included 100% CSCS pass rate (national average 56%), all candidates securing work placements, 9 have started work in the sector and the others are being case managed as they are relocated to other regions in Scotland.





## 4. The Deal – summary of progress

### Headline achievements in the past year

#### 4 Intensive Family Support Service (IFS)

- A consultation of Phase One Intensive Family Support Service was carried out. Capital City Partnership engaged with stakeholders representing third sector and statutory organisations, as well as 23 parents and young people engaging in the service to gather their experiences and views to implement Phase Two delivery plans for the programme. Consultation with families engaging in IFSS was overwhelmingly positive, with all respondents feeling that engaging in the service has had a positive impact for them and their family.
- A Holistic Whole Family Support conference took place in February 2023. The conference raised the profile of holistic whole family support in the region and built connections between organisations serving families in those areas. Several IFSS delivery partners were involved in the workshops including one parent and one young person engaging in the Fife service who shared their experience. The conference had 157 attendees representing 70 organisations.
- Phase Two of the Intensive Family Support Service commenced in January 2023 following a six-month period of consultation with stakeholders and families lead by The University of Edinburgh. The research and learning from Phase One informed the direction of Phase Two and a recommissioning process was undertaken which saw delivery partners propose changes in response to the specification. In Phase Two, work will continue with those Phase One families who continue to require support, and a minimum of 141 further families will engage.





## 4. The Deal – summary of progress

### Headline achievements in the past year

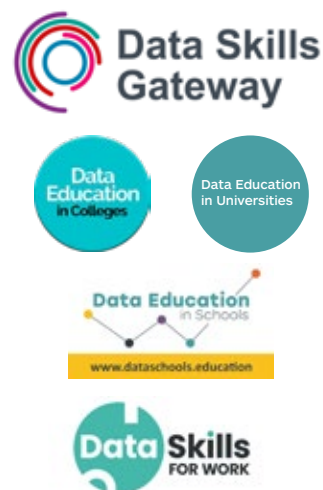
#### 5 Housing, Construction, and Infrastructure (HCI) Skills Gateway

- Over 1,000 pupils from **SIMD** 20 and 40 areas engaged in construction learning through active partnerships with Edinburgh Science, the Scottish Council for Development and Industry, and Fife Community Trade Hub.
- Publication and putting into practice of two UK-wide working papers:
  - **Equality in Engineering Pathways Report** (October 2022), followed with a mentoring scheme for 72 historically excluded HE and FE engineering students with industry leaders in ESES region.
  - **Timber in Construction Skills Action Plan** (March 2023), with the launch of Timber Technology Engineering & Design courses developed by HCI at **NMITE** and **BE-ST**.
- £300k in additional leverage achieved, with HCI leading the Innovate UK Fast Followers scheme to gain a Net Zero Innovation and Delivery Officer for 24 months, based at Fife Council and working across the Edinburgh and South East Scotland region.



#### 6 Data-Driven Innovation (DDI) Skills Gateway

- 239 learners benefitted from £67,000 funding awarded through the Data Skills for Work programme.
- Women in Digital and Data Innovation Professional Development Award in Data Science (SCQF level 7) – 75 learners enrolled and predicted completion level of 75%
- Internet of Things (IoT) sensors rolled out to 34 schools across the region.



#### 7 Workforce Mobility (WFM)

- Delivered **Scottish Borders Council Bus Network Review**.
- Supported Scottish Borders Council's pilot Demand Responsive Transport service in Berwickshire.
- Completed filming to promote **bus driving as a career** in 2023/24.





## 4. The Deal – summary of progress

### Next milestones

Due Date	Milestone
March 2024	<p><b>Integrated Knowledge Systems (IKS)</b></p> <ul style="list-style-type: none"> <li>• Migrate Midlothian Council data into Helix with site and data language mapping.</li> <li>• Set up UKSPF in Helix for Edinburgh, East Lothian, West Lothian, Midlothian, and Scottish Borders councils.</li> <li>• Investigate API for helix.scot and build out landing page for Fife Council.</li> <li>• Migrate West Lothian Council data into Helix with site and data language mapping.</li> </ul>
January 2024	<p><b>Labour Market Analysis &amp; Evaluation (LMAE)</b></p> <ul style="list-style-type: none"> <li>• Commission research into digital skills needs of health and social care sector in Edinburgh and South East Scotland.</li> <li>• Commission research into skills/labour market issues in Edinburgh and South East Scotland – focus to be agreed by partners.</li> <li>• Deliver series of workshops to disseminate Regional Skills Assessments.</li> </ul>
March 2024	<p><b>Integrated Employer Engagement (IEE)</b></p> <ul style="list-style-type: none"> <li>• Working closely with Sir Robert McAlpine, tier 1 contractor for the Dunard Centre build, following the agreement of a regional community benefit plan; employability, education, supply chain and community engagement objectives are underway, and the reporting of deliverables will commence through quarterly IRES reports.</li> <li>• The fourth annual IEE Employer Fund will launch, offering £50,000 of small grants to micro businesses across the 6 local authority areas in partnership with Business Gateway, early indications of fund theme are ‘fair work’ objectives and ‘green adaptations within the workplace to support the employee wellbeing and working environment’. The fund will launch in Q2.</li> <li>• <b>Launch Green Economy jobs sectoral awareness campaign.</b> The campaign consists of a short docufilm and series of social media shorts highlighting the importance of every citizen and business making changes to contribute to the net zero ambitions set out by governments. The campaign looks at career and training options and a snapshot of what local businesses are already doing to make a difference within this priority agenda. The campaign will be shared with our employability network of over 400 recipients and a supporting TV advert will launch across our region on STV, ETV player and ITVx. Outputs from this campaign will be expected in Q3.</li> </ul>
October 2023	<p><b>Intensive Family Support Service (IFSS)</b></p> <ul style="list-style-type: none"> <li>• Providers will complete the process of registering all children and young people to the HELIX information management system to support high quality data capture for reporting and evaluation.</li> <li>• An in-person network event for all IFSS providers will be developed and held in Autumn 2023. While the content of the event will be shaped by provider input, it intends to provide an opportunity for providers to come together, develop relationships, and share practice and learning across the region.</li> <li>• Development of Phase Two research and evaluation with academic partner or researcher to begin. Opportunities to work in partnership with Strathclyde University are currently being explored and a research proposal has been submitted to a funding body. The outcome of this application will be known in August 2023.</li> </ul>



## 4. The Deal – summary of progress

### Next milestones

Due Date	Milestone
March 2024	<p><b>Housing, Construction, and Infrastructure (HCI) Skills Gateway</b></p> <ul style="list-style-type: none"> <li>Exceed original inclusive skills target with over 800 school pupils achieving a new SCQF Level 4+ qualification in net zero skills, plus engaging over 5,668 learners from across the region.</li> <li>Develop and implement pilot programmes to address gender inequality in construction roles beyond Higher Education and Further Education students, with particular focus on reskilling older women.</li> <li>Achieve 5,000 Further Education student enrolments for net zero skills short courses delivered by Borders, Edinburgh, Fife, and West Lothian Colleges.</li> </ul>
March 2024	<p><b>Data-Driven Innovation (DDI) Skills Gateway</b></p> <ul style="list-style-type: none"> <li>Creation of video content promoting data careers, for use across the programme.</li> <li>Embed Data Skills for Work programme in mainstream skills activity of The Data Lab.</li> <li>Expand Teacher Professional Learning programme and promote development of knowledge-sharing communities.</li> </ul>
March 2024	<p><b>Workforce Mobility (WFM)</b></p> <ul style="list-style-type: none"> <li>Support Scottish Borders Council deliver the recommendations of the Bus Network Review.</li> <li>Support East Lothian Council with a strategic Journey / mobility Hub analysis (with supporting infrastructure).</li> <li>Develop and deliver the Driver Recruitment Campaign to support operators across the region.</li> </ul>

### Strategic Added Value

Inclusive growth remains at the centre of the IRES Programme with the aim of supporting long term sustainable destinations for those who live and work within the ESES region. By supporting local and regional ambition the IRES project has contributed to national policy to help shape future investment for the region. As the partnership supporting IRES develops, further opportunities for wider alignment have developed, including:

- Delivery of clear, integrated, and inclusive pathways into industry.
- Driving cross cutting themes within regional networks such as Community Wealth Building.
- Ongoing research to tackle climate emergency, green skills, and skills gaps.
- Engagement with stakeholders to support regional agendas including the development of the Regional Prosperity Framework.
- Informing future policy through ongoing engagement with stakeholders.





## 4. The Deal – summary of progress

### A720 (Sheriffhall Roundabout)

The Sheriffhall Roundabout is currently the only junction on the A720 Edinburgh City Bypass that is not grade separated, which means the City Bypass is at the same level as the A7 and A6106 local approach roads. This at-grade, six-way junction, often experiences significant queuing, especially during peak hours. The Scottish Government's commitment through the Edinburgh and South East Scotland City Region Deal includes £120 million to support improvements to the A720 Edinburgh City Bypass for the **grade separation of Sheriffhall Roundabout**. The project is being delivered by Transport Scotland and is subject to Transport Scotland's normal governance procedures.

### Headline achievements in the past year

Continued engagement with the City Region Deal partners, on progress and technical scheme developments.

- Formal responses issued to all objections made to the draft Orders and Environmental Statement.
- Public Local Inquiry (PLI) conducted by the DPEA from 30 January to 8 February, to consider objections raised and maintained in response to publication of the draft Orders for the proposed Scheme.



Visualisation of the proposed Scheme looking from the South-West



Visualisation of the non-motorised user facilities included in the proposed Scheme



Visualisation of the non-motorised user facilities included in the proposed Scheme



## 4. The Deal – summary of progress

### Next milestones

Due Date	Milestone
Late-2023	DPEA Reporter to conclude and submit their PLI Report to Scottish Ministers for consideration. Delivery of the proposed Scheme can only commence if the proposed Scheme is approved under the statutory procedures. Only following completion of statutory consents can a programme be set for delivery of the proposed Scheme.

### Strategic Added Value

The project will:

- Address the bottleneck on the strategic road network by improving operating conditions and connectivity at Sheriffhall and help to reduce the traffic impact of proposed developments on the area.
- Provide high quality active travel facilities to deliver a step change in accessibility for walking and cycling.
- Support future development in the region, including the South East Wedge development, inclusive growth and the removal of physical barriers to growth through delivery of programme of construction across the region.
- Contribute towards the requirement to provide Community Benefits in line with the requirements of the Procurement Reform (Scotland) Act 2014.
- Support wider skills development in the construction sector.

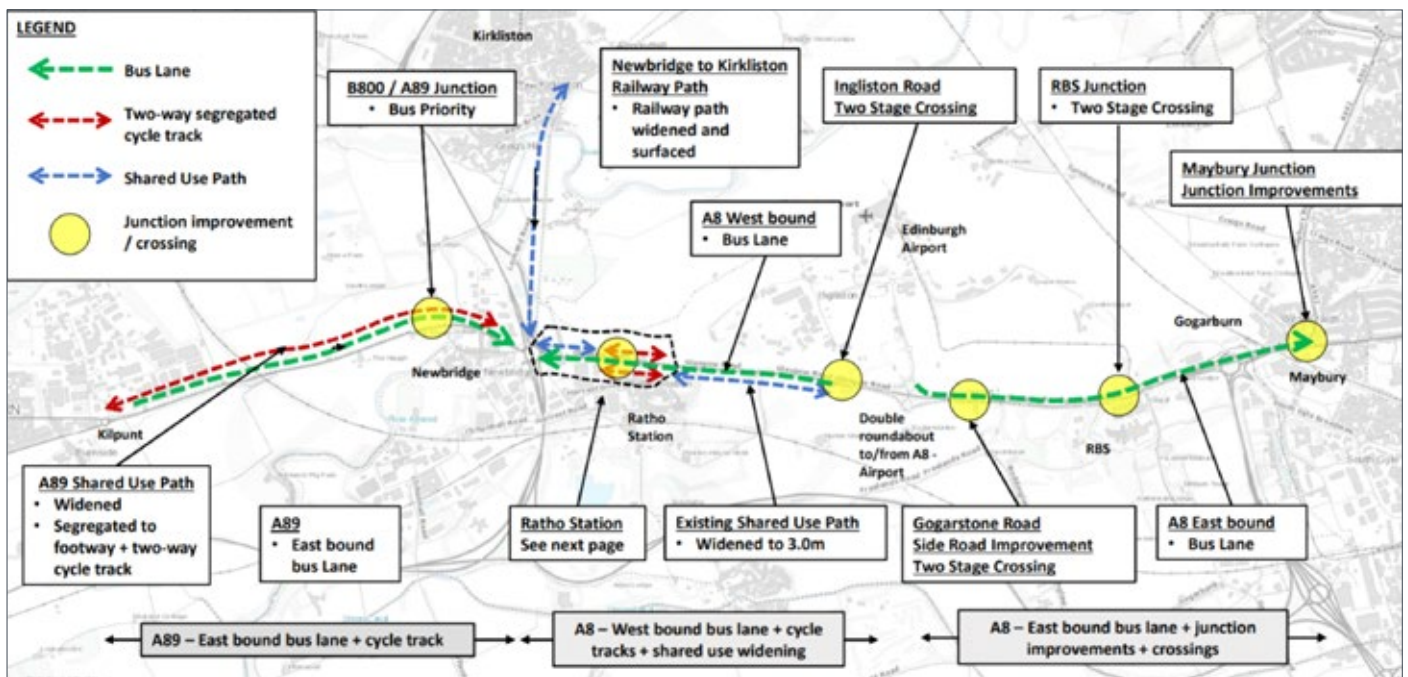


## 4. The Deal – summary of progress

### West Edinburgh Transport Improvement Programme (Wetip)

West Edinburgh is recognised by the Scottish Government as a key national economic asset and perhaps the most important gateway to Scotland. National Planning Policy set the long-term vision for development and investment across Scotland and cites West Edinburgh as a significant business investment location with potential to be internationally competitive. In recognition of West Edinburgh's key gateway function Edinburgh Airport and the scale of adjoining land identified for development. The vision for West Edinburgh and the unlocking of the proposed business and residential development cannot be delivered without significant investment in an

integrated package of transport intervention measures. These include a core package of sustainable transport improvement measures along the A8/A89 corridor that provide long term resilience and support strong connectivity between neighbouring authorities and communities. The transport intervention measures are centred around sustainable transport enhancements between Broxburn and Maybury and are necessary to mitigate the impacts of new developments and meet current agreed modal share/shift targets. This proposal is in line with the City Region Deal vision which looks to accelerate the rate of investment and economic performance by capitalising on our existing world class assets through an inclusive and sustainable growth model.





## 4. The Deal – summary of progress

### Next milestones

- Completion of initial Options Appraisal stage which included the following activities:
  - Programme Initiation.
  - Review and refresh of the Case for Change.
  - Review of more ambitious schemes (following announcement of the Bus Partnership Fund).
  - Preliminary Appraisal of Options.
  - Feasibility study for a mobility hub at Broxburn.
  - Topographical Surveys and initial Utilities assessment.
- Mobilisation of Outline Business Case (OBC) stage with following activities commenced:
  - Draft Preliminary Design.
  - Stakeholder Engagement and Public Consultation.
  - Detailed Options Appraisal.
- Transport Planning Objectives to support OBC agreed by Programme Board

Due Date	Milestone
Autumn 2023	Issue draft Outline Business Case for review by Transport Scotland
Early 2024	City of Edinburgh Council Transport & Environment Committee and West Lothian Council Committee OBC approval
Spring 2024	ESES CRD Joint Committee OBC approval
Spring 2024 – End 2024	Advertisement of Statutory Road Orders (including Consultation)
Spring 2024 – Autumn 2024	Procurement

### Strategic Added Value

The purpose of the West Edinburgh Transport Improvement Programme is to progress the delivery of the public transport and active travel measures identified in the 2016 WETA Refresh study including the assessment of the feasibility and demand for a mobility hub at Broxburn. Interventions are being appraised against a wide range of objectives including, but not limited to, the promotion of sustainable travel to a range of destinations; improving regional connectivity and accessibility for all to jobs, education, healthcare and leisure; and delivering an improved active travel and public transport mode share within West Edinburgh to support net zero carbon emission targets.

The Programme brings together a range of stakeholders contributing to successful delivery. These include the City of Edinburgh Council, West Lothian Council, Bus Operators, Transport Scotland, Active Travel Groups, Bus User Forums, SEStran, Sustrans, Network Rail, Edinburgh Airport, Major Developers and other statutory consultees. In due course, this project will be procured as a construction project, and links with the Housing and Construction Infrastructure Skills Gateway will be established. The improvement of public transport provision in this area has the potential to unlock housing development opportunities and ease congestion in the corridor between West Lothian and Edinburgh.



## 4. The Deal – summary of progress

### Dunard Centre

The Dunard Centre, supported by Royal Bank of Scotland, will be Edinburgh’s first purpose-built concert venue in 100 years: a sensational space that helps artists and audiences connect like never before.

Nestled in the heart of Edinburgh’s New Town, visitors will be able to stream into the venue on foot, on pedal and by bus, tram and train, with an all-day programme of performances, tours and café/bar options encouraging drop-ins as well as dedicated trips.

Though the plot is little bigger than a football pitch, the ingenious design of the hall will transform the previously screened-off site into a dynamic new public precinct, opening up music-making for all.

The plot is currently undergoing enablement works to prepare for main construction, and promotion of this exciting new space has also begun, including a Day One recital by Scottish Chamber Orchestra cellist Su-a Lee, and the launch of a website that allows music lovers to explore the plans.

Our powerful public positioning focuses on inclusion: the Dunard Centre is “for music and for everyone.” Dedicated to both excellence and experimentation, it will be a place that supports music-makers of all styles and career to *play* – with their own art form, with cross-genre collaborations and with audiences, both on and off-stage.

By celebrating the talent of today the Dunard Centre will help create the music of tomorrow, a mission made possible by the incredible partnership between the City Regional Deal, generous philanthropists and visionary corporates.



Dunard Centre



Dunard Centre northern approach Dunard Centre cafe terrace  
Image: David Chipperfield Architects and Hayes Davidson



Dunard Centre auditorium  
Image: David Chipperfield Architects and Hayes Davidson



## 4. The Deal – summary of progress

### Milestones achieved in the past year

- **19 January 2023:** the Dunard Centre site is formally transferred from Royal Bank of Scotland to IMPACT Scotland, the charity in charge of developing and delivering Edinburgh’s new music venue
- **6 February 2023:** site clearance works begin, marked by an intimate concert for construction workers, stakeholders and media
- **March 2023:** Ronnie Bowie takes over the Chair for IMPACT Scotland, and immediately heads up the international search for our first permanent CEO
- **May 2023:** Jo Buckley is announced as IMPACT Scotland’s first permanent CEO, with a start date of September 1 2023
- **May 2023:** RIBA Stage 4 Design completed and is signed off by Trustees
- **June 2023:** [www.dunardcentre.co.uk](http://www.dunardcentre.co.uk) launches

### Next milestones

Due Date	Milestone
1 September 2023	Jo Buckley joins IMPACT Scotland as CEO
September 2023	<i>Music Matters</i> research fieldwork gets underway (see below)
By November 2023	IMPACT Scotland Stage 2 tender acceptance
By January 2024	Main construction start date

That’s why we’ve commissioned an ambitious quantitative and qualitative study into consumer attitudes and behaviour, which we will use to inform our future messaging, artistic development and audience mobilisation efforts. We also anticipate using the data to help shape ongoing and standalone campaigns across our Community Benefits commitments once the main construction phase begins.

### Strategic Added Value

The Dunard Centre will be a 21st century space dedicated to musical excellence and artistic experimentation.

Our definition of a 21st century space comes from two things: firstly a place that offers audiences and artists great sound and a great experience; and secondly a venue that encourages and enables as many people as possible to access the extraordinary benefits of live music.

However, our inclusive ambition of operating as a ‘hall for all’ requires us to be audience-driven, securing a detailed understanding of how citizens currently engage with music in all formats so that we can reflect this lived experience in our own outreach and communications campaigns.

Working with expert, Edinburgh-based JRS Consortium, our research waves begin with Edinburgh and South East Scotland citizens, before widening our sample out to Scotland as a whole, providing our team with rich baseline findings to build upon at local and national level.

As a data-driven organisation we will continue to share the research roadmap with CRD stakeholders, actively exploring opportunities to involve the wider network in our sampling and reporting efforts. We are targeting a best-in-class approach to insight-driven programme development and marketing; just one example of IMPACT Scotland’s wider pursuit of building excellence: both on site and within our own organisational development.



## 4. The Deal – summary of progress

To ensure the region can continue to successfully deliver on its housing ambitions and react to the existing and future political, economic, and environmental conditions a refreshed set of five housing priorities were developed and agreed at the **December 2022 Joint Committee meeting**. The priorities are - Affordable Housing Delivery (current and future); Retrofit (EESH2); Home Demonstrator Project; Strategic Sites; and Future Town Centres and New Delivery Models Regional partners also collaborate, share best practices and lessons learned on homelessness, infrastructure, innovation, retrofit and delivering net-zero carbon housing.

The region continues to deliver a significant proportion of Scotland’s new affordable homes. In 2022/23 the region collectively delivered nearly 1,800 approvals, 2,300 site starts and 2,400 completions, and a spend of £174m- all ahead of annual targets. Due to the scale and effectiveness of the region’s affordable housing programmes, the region has again continued to utilise underspend from elsewhere in Scotland with an additional £41m (compared with Scottish Government Resource Planning Allocation (RPAs)) absorbed to spend on affordable housing delivery.

Approvals for the region are slightly lower than anticipated, which was due to adverse market conditions. This is reflected elsewhere in Scotland, with **the Scottish Government’s quarterly statistics** to the end of September 2022 (published March 2023) reporting that, across Scotland, private led new builds reduced by 11% and housing association new build approvals dropped by 27%. Encouragingly there was a 14% increase in site starts across the region and completions were also ahead of target.



Blindwells



Granton



## 4. The Deal – summary of progress

Over the next five years, the region had projected that it would spend over £1bn to deliver 18,000 affordable homes.

Across the seven strategic sites (Blindwells, Calderwood, Dunfermline, Edinburgh’s Waterfront, Shawfair, Tweedbank and Winchburgh) a total of 181 social and 32 mid-market rent and 697 homes have been completed over the last year. A breakdown is provided below:

Delivery (completions)	Tenure Mix			
	Social Rent	MMR	BTR	Market
Blindwells	60	0	0	48
Calderwood	103	32	0	233
Dunfermline	0	0	0	252
Granton Waterfront	0	0	0	0
Shawfair	18	0	0	0
Tweedbank	0	0	0	0
Winchburgh	0	0	0	164
<b>Total</b>	<b>181</b>	<b>32</b>	<b>0</b>	<b>697</b>

The strategic sites have planning consent for a potentially transformational delivery pipeline of 4,355 social, 271 mid-market rent and 12,544 market homes as detailed below:

Delivery (approvals)	Tenure Mix			
	Social Rent	MMR	BTR	Market
Blindwells	480	0	0	1,120
Calderwood	550	0	0	1,650
Dunfermline	1,331	0	0	3,994
Granton Waterfront	334	271	0	0
Shawfair	798	0	0	3,192
Tweedbank	0	0	0	0
Winchburgh	862	0	0	2,588
<b>Total</b>	<b>4,355</b>	<b>271</b>	<b>0</b>	<b>12,544</b>

Please note that this breakdown does not capture the scale of design, development and enabling activity that has been delivered over the last year which will unlock significant construction activity in future years. The Headline Achievements below captures some of this detail and the Next Milestones section demonstrating the scale and breadth of activity that will take place over the next year.





## 4. The Deal – summary of progress

### Headline achievements in the past year

- The Regional Housing Programme Update, was **approved** at the December 2022 Joint Committee meeting, with a further update scheduled for the 1 September 2023 Joint Committee meeting.
- At Winchburgh over the past year the following has been delivered:
  - Winchburgh Academy (the non-denominational secondary school) completed on time and on budget and opened in August 2022.
  - Holy Family Primary School (the new denominational primary school) completed on time and on budget and opened in August 2022.
  - The new motorway junction on the M9 was opened early in 2023.
  - The new marina on the Union Canal completed and opened.
- At Dunfermline, Officers are working collaboratively with a key landowner to identify a potential solution to enable the delivery of necessary education capacity that can unblock the delivery of 2,575 new homes.
- Ongoing completion of consented development in Blindwells Phase 1, with detailed approvals and delivery for second phase infrastructure and on-going commercial and residential development underway, with 140 families now living in new homes. 80 affordable homes and school site now transferred to the East Lothian Council and proposals for new local centre submitted for approval. Commencement of the Strategic Outline Case for Blindwells Expansion now underway, with SOC anticipated Q3/4 2023/24.
- At Tweedbank a Prior Information Notice (PIN) has been issued for a development partner before moving toward procurement. £50k Scottish Government funding has also been secured to support a feasibility study for a heat and energy network for the entire site.
- At Calderwood housebuilding is progressing ahead of forecast and agreement has been secured on a developer funded third stream Calderwood Primary School
- Regional Home Demonstrator - The collaboration between local and national government, academia and the construction industry is testing a new model for designing, procuring and delivering new homes in the region to create a greener future.
- Partners have committed two years funding to continue resourcing and formation of a Regional Delivery Alliance to:
  - Sustain/maintain regional pipeline including strategic sites.
  - Engage with industry on pipeline delivery.
  - Support initial feasibility studies.
  - Sustain/maintain regional typologies & design and performance standard.
  - Facilitate the bundling of sites across the region; and
  - Identify additional funding/resourcing opportunities.



## 4. The Deal – summary of progress

- **Edinburgh Living** has drawn down all of the one-off grant of £16.1m approved as part of City Region Deal. In 2022/23 was successful in securing an additional £6 million in grant funding from Scottish Government to support acquisition of homes for mid rent. 543 of the 728 mid-market rent homes have been delivered already with around 78 more homes expected to be purchased in 2023/24. The remaining mid rent homes are in design/development or under construction as part of the Council's housebuilding programme.

### Next milestones

Due Date	Milestone
Aug 23	Winchburgh – Sinclair Academy (the denominational secondary school) completed on time and on budget.
Sep 2023	Dunfermline – Planning application to be submitted for new bridge at Halbeath (first major component of the new Northern Link Road).
Summer 23	Winchburgh – Submission of a planning application for the first new non-denominational primary school.
Summer 23	Shawfair – Installation of 4km of pipework for Shawfair District Heat Network followed by Energy Centre to serve 3000 homes and commitment to new 32Mva primary substation to meet all of Shawfair's power requirements.
Summer 23	David Lloyd Leisure and Danfoss Low Carbon Manufacturing facility open on Shawfair Park.
Summer/ Autumn 23	Tweedbank – begin construction with the phase 1 access road into the larger Lowood site. This will unlock access to 2 development sites initially, with an extension to that road to follow, opening up access to a further 2 sites.
Autumn 23	Tweedbank – Care Village progressing to Planning.
Autumn 23	Shawfair – acquisition of All Through Campus site by Midlothian Council and remediation of site begins.
Nov 23	Dunfermline – Bothwell Gardens Roundabout signalisation delivered (second required intervention measure).
Nov 23	Dunfermline – Broomhall (2250 consented units) phase 1 development strategic infrastructure delivery plan, development brief and phase 1 housing delivery submitted.
Dec 23	Dunfermline – Phase 1 and related infrastructure for Halbeath (1400 consented units).
Winter 23	Calderwood – Commencement of construction of a third-stream accommodation at Calderwood Primary. Completion of a new access to St Paul's Primary School.



## 4. The Deal – summary of progress

Due Date	Milestone
Winter 23	Granton Waterfront – First set of homes delivered and tenants start moving in.
Dec 23 / Early 24	Blindwells Strategic Outline Business Case .
Winter 23 / Spring 24	Tweedbank – Full Business Case .
Feb 24	Granton Waterfront – Regional Home Demonstrator D1 site complete – Delivery of 75 Net Zero Homes.
March 24	Dunfermline – Phase 2 development brief for strategic transport infrastructure
Spring 24	Winchburgh – Completion of the distributor road to the M9 including new bridges over the Union Canal and Edinburgh – Glasgow Railway line.
Spring 24	Shawfair – Starting infrastructure delivery to access and service 30 acres of employment land.
Summer 24	Shawfair – First ‘heat on’ connection for housing on Shawfair District Heat Network
Summer 24	Granton Waterfront – Full Business Case – Working with development partner to progress designs and planning permission and produce a Final Business Case for phase 1 of regeneration: circa 800 homes, the first phase of a low carbon heat network, a primary school, 3,000m2 of commercial space, a mobility hub and active travel upgrades.
Summer 24	Granton Waterfront – Final Business case being developed for Waste Water Sewer Source Heat Network – working with development partner to progress designs and planning permission and securing anchor load connections.
Autumn 24	Granton Waterfront – Signing of Development Agreement, Concession Agreement, Heat Supply Agreement and Building contract to allow commencement of enabling and infrastructure phase including heat network pipe laying and energy centre delivery.
Winter 24	Granton Waterfront gasholder park under construction with completion anticipated late 2024.

### Strategic Added Value

- The seven strategic sites can collectively deliver transformational economic and social change both in terms of housing supply, circa. 40,000 homes, and for the local, regional and national economy, through maximising the economic benefits from the construction of new homes and ensure that jobs, training and apprenticeships are targeted towards disadvantaged areas across the region. These sites all require further work and business case development with most of these homes anticipated to be delivered over the next 10-20 years. Several of the sites therefore require a

long-term commitment and investment from Government, agencies and key stakeholders. advantages that the CRD partnership working is bringing to add value to the proposal.



## 4. The Deal – summary of progress

- Housing is a key social, economic and environmental driver. Greater integration across these drivers and City Region Deal policy themes is essential to support the growth requirements of the region and to deliver new communities which deliver the quality of place that ensures the South East of Scotland is a desirable place for people to live and for businesses to invest. Advantages that the CRD partnership working is bringing to add value to the proposal.
- Strategic sites will provide opportunities to create sustainable 20 minute neighbourhoods and due to their scale, will secure significant biodiversity enhancements and renewable energy generation to address the climate emergency.
- The Edinburgh Home Demonstrator will project is delivering Net Zero Carbon Homes in Granton and will seek to scale up delivery across the city region. This will demonstrate the effectiveness of homes designed and constructed to net zero carbon. Using Modern Methods of Construction (MMC). MMC uses technology, new materials and contemporary on-site building techniques to improve efficiency and quality in buildings.
- At Dunfermline - Progression of Broomhall will ultimately provide employment land to support the Forth Green Freeport.
- Under EESH 2 new housing will need to have zero emissions with social landlords expected to be fully compliant by 2026. Significant work will be required to ensure existing properties across all tenures are retrofitted to improve energy efficiency and decarbonised heat to meet new zero emissions targets.
- The Regional Housing Programme delivers on the Regional Prosperity Framework (RPF) ambitions and vision to protect environment and make best use of our extraordinary built and natural assets, ensuring that our Region delivers a just transition to a net zero economy. It also delivers on the three main goals of the RPF Delivery Plan – reduce economic exclusion, sustained and increased competitiveness and accelerate a fair transition to Net Zero.



## 5. Our Approach to Benefits Realisation

### Our Approach to Benefits Realisation

To date, Benefits Realisation is an area that significant progress has been made on over the last five years. In 2020, the Benefits Realisation Plan was published following approval by the Joint Committee in September 2020.

In 2021, the Programme Management Office (PMO) commissioned the Smart Data Foundry to recommend measures to be put in place so that outputs and impacts can be captured, measured, and reported on by 2023 and thereafter.

In the annual report last year, three key questions were explored pertaining to Benefits Realisation. To summarise, these questions asked what outputs and impacts might be captured by 2023; what is currently in place to capture, monitor and manage outputs; and what actions need to be taken to ensure benefits are monitored and evaluated effectively going forward. In 2023, action has been taken to progress and address these questions.

#### 1 What outputs and impacts might be captured by 2023?

Great progress has been made in creating a Benefits Realisation Measurement Framework (approved by the joint committee and published in March 2023). This framework was identified as a key action required in last year's annual report and allows for a sophisticated approach to monitoring and evaluating each project in the city deal both quantitatively and qualitatively.

A Benefits Realisation report will be taken to the September 2023 Joint Committee which outlines benefits captured in 2023, and the longer-term approach to the monitoring and evaluation of benefits. By 2028 the position will have changed significantly, with every project theme being able to report outputs and impacts.

#### 2 What is currently in place to capture, monitor and manage outputs?

Last year, three actions were recommended to take benefit realisation forward in 2023. These actions were:

- Appoint a Senior Responsible Officer to oversee benefits realisation (completed).
- Secure a Benefits Realisation Officer within the PMO to co-ordinate City Region Deal project and programme output and impact reporting (completed); and
- Develop and implement an outputs, outcomes, and impacts reporting framework across all City Region Deal projects to complement and enhance the current output reporting already undertaken by the PMO (completed).





## 5. Our Approach to Benefits Realisation

In addition to the above, two further monitoring and evaluation actions are being implemented:

- A Benefits Output and Impacts Monitoring template has been created, this template ensures each quantitative output and impact established in the business case of each project are monitored, with qualitative data supporting this data. These templates will be reported in full at the end of Q1 each year and will be a part of the 2024 annual report.
- Initial GVA estimates have been created using methodology outlined which is approved by both Scottish and UK governments. These estimates were included in the 5-year review to estimate GVA in the first 5 years of the deal, the goal is for this to become more sophisticated with full GVA reports being produced that assess overall GVA, indirect GVA, induced GVA, catalysed GVA and GVA of each project to each specific Local Authority in the ESES.

### 3 What actions need to be taken to ensure benefits are monitored and evaluated effectively going forward?

Going forward, the next steps for benefit realisation are about implementation. There are five main actions to be taken:

- A reporting template is being issued to monitor quantitative outputs and impacts, and it is the responsibility of the Benefits Realisation Officer to collate and process this data, whilst also supplementing the quantitative data with qualitative data as outlined in the benefits realisation measurement framework.
- During implementation, continue working closely with partners in both UK & Scottish Governments, as well as utilising the Benefits Realisation group, in which officers working on benefits realisation in city deals across the UK come together to ensure best practice is shared and work collaboratively to problem solve.
- Encouraging the adoption by all projects of the City Partnership Community Benefits portal and consequent capturing and reporting of these benefits.
- Ensuring all projects are involved in on-going engagement with Scottish Government in relation to the guidance on whole-life carbon costs and incorporation into business cases, procurement, and ongoing operational commitments.
- Once benefit data is captured and processed, evaluate how benefits delivered fit into the wider picture in terms of regional prosperity goals, community wealth building goals and inclusive growth goals.



## 6. Regional Prosperity Framework

### Regional Prosperity Framework

The City Region Deal partners have developed an ambitious 20-year economic framework called the Regional Prosperity Framework (RPF) which articulates the next phase of activity to develop the regional economy, building upon the successes of the Deal.

The **RPF Delivery Plan** was approved at the Joint Committee meeting in March of this year, following individual approval by each of the six Local Authorities and University of Edinburgh Court.

The Delivery Plan seeks to drive prosperity for Edinburgh and South-East Scotland through delivering on the RPF ambitions and vision:

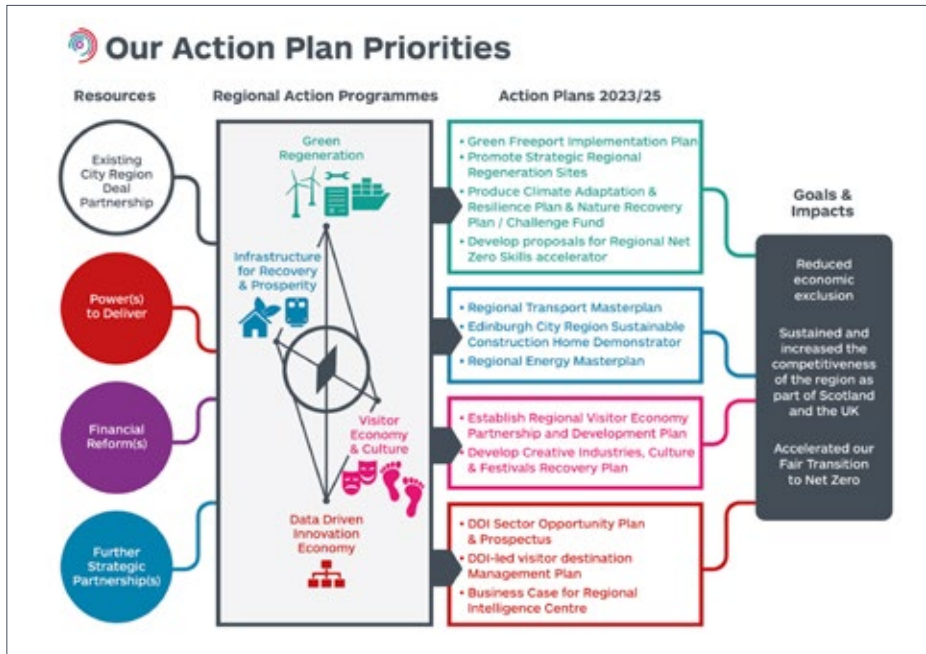
to ensure the social and economic benefits of future growth extend to all. All sections of the community will have the opportunity to develop and enhance the key skills that will help to end inequalities in our society. We will protect our environment and make best use of our extraordinary built and natural assets, ensuring that our Region delivers a just transition to a net zero economy. Our institutions, ancient and modern, will deliver positive outcomes that enhance our local, national, and international reputation. Our aim is to become the data capital of Europe.





## 6. Regional Prosperity Framework

The Delivery Plan has four key programmes, priority projects and three core goals, summarised in the diagram below:



Regional partners recognise that delivering the three main goals of the RPF Delivery Plan requires alignment between local, regional and national ambitions, policies and resources.

The four programmes will enable the city region to maintain and enhance its global reputation and become the data capital of Europe, delivering sustainable and inclusive growth. The Delivery Plan aligns with Scotland’s **National Strategy for Economic Transformation** (NSET), Scotland’s Regional Economic Policy Review recommendations, and UK Government’s **Levelling Up** priorities.

Regional partners are now engaging with ministers and civil servants to secure support and progress the priority projects within the plan, and are aiming to complete propositions and asks of Government by the end of the calendar year.

A long term, integrated, place-based capital and revenue funding programme agreement is being sought. Such a mechanism would enable the region to take a joined-up approach across transport, planning, housing and economic development priorities and deliver shared outcomes.





## 7. The Year Ahead

Date	Milestone
Aug 23	Sinclair Academy (denominational secondary school at Winchburgh) completed.
Sep 23	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> <li>• City Region Deal Benefits Realisation Update.</li> <li>• Regional Housing Programme Annual Update.</li> <li>• City Region Deal Annual Report 22/23.</li> <li>• Audit Scotland Report: “Scotland’s City Region and Growth Deals Progress of the 2020 audit report recommendations.</li> </ul>
Sep 23	New Edinburgh Futures Institute building in Lauriston place welcomes first intake of students.
Nov 23	Commencement of construction of Edinburgh Innovation Hub.
Late 23	DPEA Reporter to conclude and submit their Public Local Inquiry Report on the A720 Sheriffhall scheme to Scottish Ministers for consideration.
Winter 23	Blindwells Strategic Outline Business Case complete.
Winter 23	Tweedbank Housing Full Business Case complete.
Early 24	Opening of Usher Institute Building.
Oct 23	Business Units in Levenmouth complete as part of the Fife I3 Programme
Dec 23	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> <li>• A720 Sheriffhall six-monthly update from Transport Scotland.</li> <li>• Culture Programme Annual Update.</li> <li>• Integrated Regional Employability and Skills Programme Annual Update.</li> </ul>
Dec 23	Regional Home Demonstrator D1 site complete at Granton Waterfront delivering 75 Net Zero Homes.
By Jan 24	Main construction at Dunard Centre starts.
Early 24	Final Business Case for phase 1 of regeneration at Granton complete.
Mar 24	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> <li>• City Region Deal Benefits Realisation Update.</li> <li>• Data-Driven Innovation Programme Annual Update.</li> <li>• West Edinburgh Transport Improvement Plan Outline Business Case.</li> <li>• A701 Relief Road and A702 Spur Road (Easter Bush) update.</li> <li>• Borders Business Park Phases 2 and 3 business case.</li> </ul>
Spring 24	Business Units in Fife Interchange North, Dunfermline complete as part of the Fife I3 Programme.
Jun 24	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> <li>• A720 Sheriffhall six-monthly update from Transport Scotland.</li> <li>• Transport Programme Annual Update.</li> </ul>



## 8. Contacts and External Links to Further Information

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### Further Information

- Keep up to date with the latest news and join the mailing list at [www.esescityregiondeal.org.uk](http://www.esescityregiondeal.org.uk)
- **Data-Driven Innovation website**
- Download all Joint Committee reports including approved business cases at **The City of Edinburgh Council Committee library website**.
- Visit the **webcast library** to view recordings of each Joint Committee meeting

18<sup>th</sup> April 2024

Agenda Item No. 6

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## Tay Cities Deal Annual Report and Benefits Realisation Plan

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**Report by:** Gordon Mole, Head of Business & Employability Services

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**Wards Affected:** 16-20

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### Purpose

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This report presents the third Annual Report on progress by the Tay Cities Region Deal from 1<sup>st</sup> October 2022 to 30 September 2023.

### Recommendation(s)

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The Scrutiny Committee is asked to consider the Annual report by Tay Cities Deal, noting the progress on activity in North East Fife.

### Resource Implications

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None.

### Legal & Risk Implications

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There are no legal and risk implications from this Report.

### Impact Assessment

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An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery and policy.

### Consultation

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None.

## 1.0 Background

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- 1.1 The Tay Cities Region Deal was signed on 17th December 2020 by the Tay Cities Partnership and both Governments. The Deal is a combined investment of £300m from the Scottish and UK Governments over ten years to deliver benefits over the next fifteen years. The Tay Cities Region Deal will support business growth, develop innovative technologies, enhance productivity, develop skills, and create jobs. The investment is expected to leverage a further £400m and secure more than 6,000 jobs.
- 1.2 The Deal follows the Regional Economic Strategy themes of:
- **An empowered & Inclusive Tay** - Empower and promote inclusion – by ensuring that local people have the skills they need to success in the modern workplace and growth is inclusive, with a Government investment of £30.1m.
  - **An Innovative & International Tay** - Innovate and internationalise – by developing globally recognised clusters of academic and business excellence, with a Government investment of £237.9m.
  - **Connected Tay** - Connect – by improving physical and digital infrastructure, with a Government investment of £32m.
- 1.3 The Tay Cities Region Deal is comprised of local, regional, and national partners. These include:
- Local Authorities – Angus, Dundee City, Fife and Perth & Kinross Councils.
  - Higher Education and Further Education sector.
  - The business sector.
  - Regional third sector interface bodies.
  - Scottish Enterprise.
  - Skills Development Scotland.
  - Tactran.
  - Visit Scotland.
- 1.4 Noting that only North East Fife is included within the Tay Cities Deal, with the remainder of Fife within the Edinburgh and South East Scotland City Region Deal.

## 2.0 Tay Cities Region Deal Annual Report 2022/23

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- 2.1 The 2022 /23 Tay Cities Region Deal Annual Report was published in March 2024. This is the third Annual report since the Deal was signed in December 2020. Page 4 of the Annual Report in Appendix 1 shows the key achievements in the Executive Summary. The programmes and projects being delivered under the City Region Deal can be found under each of the key themes on Page 6 of the Annual Report.

- 2.2 The University of St Andrews' Eden Campus has received £26.5m investment through the Tay Cities Deal. £2m is from the Scottish Government and £24.5m from the UK Government. It is part of the Innovative & International Tay theme within the Deal. The D'arcy Thompson Simulator, located within the Campus, also received £300k investment from the UK Government. The University's Eden Enterprise Centre opened in 2021. The Deal investment is expected to leverage a further £110m of investment, a total investment of £136m. The City Region Deal investment has been fully claimed so it does not feature in this Annual Report.
- 2.3 The Regional Skills and Employability Programme is now in delivery. Up to £20m of City Region Deal Investment will make incremental changes to improve the currently complex and weakly-connected regional employability and skills landscape to deliver better outcomes for all, particularly those people facing significant disadvantages to securing and sustaining meaningful, high-quality employment. The projects will be delivered regionally, with opportunity for businesses and residents from North East Fife to participate. More information is available in Page 29-31 of the Annual Report.
- 2.4 Fife Council is the lead for the Digital Skills Project, now branded as DigiTay. The launch event for the project took place on 7<sup>th</sup> November 2023 in Dundee. Since then, a pilot project has been launched to support 16 – 24 year-olds into Software Development and a partnership has been formed with the Data Lab Scotland to support up to 100 individuals gain Data Skills through the Data Lab's "Data Skills for Work Programme". Further information including a case study is available on page 34-35 of the Annual Report. Work is also underway to develop the scope of Phase 2 for the project.
- 2.5 Within the Culture and Tourism programme, there is a Culture and Tourism investment programme and four projects. Within the investment programme, two projects have been approved. Tay Adventures is another potential project for the investment programme. This includes up to three projects in North East Fife to develop additional landing facilities to enable greater leisure use of the Tay. The Tay Adventures Business Case has been developed and will be considered after the review of the Culture and Tourism investment programme in 2024/5.

## The Benefits Realisation Approach

- 2.6 Appendix 2 of this report is the Inclusive Growth Statements that have been published as part of the Benefits Realisation Plan for the Tay Cities Region Deal. Projects within North East Fife and the inclusive growth objectives the aim to deliver are as follows:
- The Digital Skills project (DigiTay): Page 5 and 6 in Appendix 2.
  - Eden Campus: Page 15 and 16 in Appendix 2.
  - Stretch Dome Simulator: Page 16 and 17 in Appendix 2.
  - 5G Digital Testbeds: Page 24 and 25 Appendix 2. A Fife-based Business - Digiflec - was successful in their bid to the 5G Innovation Challenge Fund. Their project utilises 5G technology to integrate LiDAR technology to monitor and enhance the infrastructure efficiency on the Tay Road Bridge. The technology contributes to the development of smart cities by improving traffic flow, structural health monitoring, and safety measures. A webinar outlining the project can be found here: [Smart City Technologies: LiDAR on the Tay Road Bridge - YouTube](#).

- 2.7 Appendix 3 of this report is the Benefits Realisation Plan for the Tay Cities Region Deal. Its purpose is to demonstrate, to the local, regional, and national stakeholders, how the Partnership will capture the outputs, outcomes, and impacts resulting from Tay Cities Region Deal investments. It also outlines the approach to monitoring (Page 16) and evaluation (Page 19).
- 2.8 Page 5 of The Benefits Realisation Plan (Appendix 3) sets out the proposed Jobs and Leverage commitments. There is a forecast of additional jobs against the 6,000-job commitment.
- 2.9 Table 3, Page 8 of The Benefits Realisation Plan provides a broad overview of the inputs and activities within the Deal - the main Beneficiary groups / conditions that will be impacted by the activities; the short-term direct outputs that will result within these groups / conditions on completion and operation of Programme facilities and interventions; medium terms impact indicators and a minimum number of long-term impacts.

## 3.0 Conclusions

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- 3.1 The third Annual Report on the Tay Cities Region Deal confirms that the Deal is now progressing delivery. The University of St Andrews has completed the projects at Eden Campus to deliver its Business Case and has fully drawn down committed budget. The Campus is also delivering its net zero carbon ambitions.
- 3.2 The Business Case for the Tay Adventures projects will be progressed in 2024 /2025 and the Digital Skills Project will develop its Phase 2. These will provide further opportunities for investment and activity in North East Fife.
- 3.3 The Inclusive Growth Statements and the Benefits Realisation Plan demonstrates the City Region Deal has relevant and appropriate Benefits and an effective process for monitoring, reporting, and evaluating to determine the impact of the Deal of the Region.

### List of Appendices

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- Appendix 1: Tay Cities Region Deal Annual Report 2022/23
- Appendix 2: Tay Cities Region Deal Inclusive Growth Statements 2023
- Appendix 3: Tay Cities Region Deal Benefits Realisation Plan 2023

### Background Papers

The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act, 1973: -

- Tay Cities Region Deal [tay\\_cities\\_deal\\_doc\\_feb\\_8.pdf \(taycities.co.uk\)](#)

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Smarter + Fairer

# Tay Cities Region Deal ANNUAL PERFORMANCE REPORT

1 October 2022 - 30 September 2023



Funded by  
UK Government



Scottish Government  
Riaghaltas na h-Alba

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The Tay Cities Region Deal will support business growth, develop innovative technologies, enhance productivity, develop skills and create jobs.

# Executive Summary



Up to the end of September 2023, **£231m** of funding was approved for investment by Joint Committee over the 10 year programme. This equates to more than  $\frac{2}{3}$  of the Deal.



**£116m** of Government Investment released.



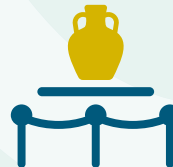
Accelerated **£13m** of funds from the Scottish Government in the 23/24 financial year, bringing the total of accelerated funds to date to **£33.9m**.



**£145.8m** leverage has been secured by Projects within the Deal. This equates to more than  $\frac{1}{3}$  of the overall leverage commitment of the Deal.



**The Tay Cities Engineering Partnership (TCEP)** celebrates its official opening, marking a pivotal moment in the region's engineering landscape.



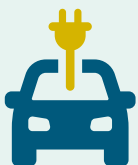
Development of **Perth Museum** completed, with fit out of the museum ongoing. This is due to open to the public in spring 2024.



**5G Digital Testbeds and University of Abertay** showcase new virtual production technology using 5G connectivity



Building of the **Innovation Hub at University of Dundee** commences and sees the start of the development of the Biomedical Cluster

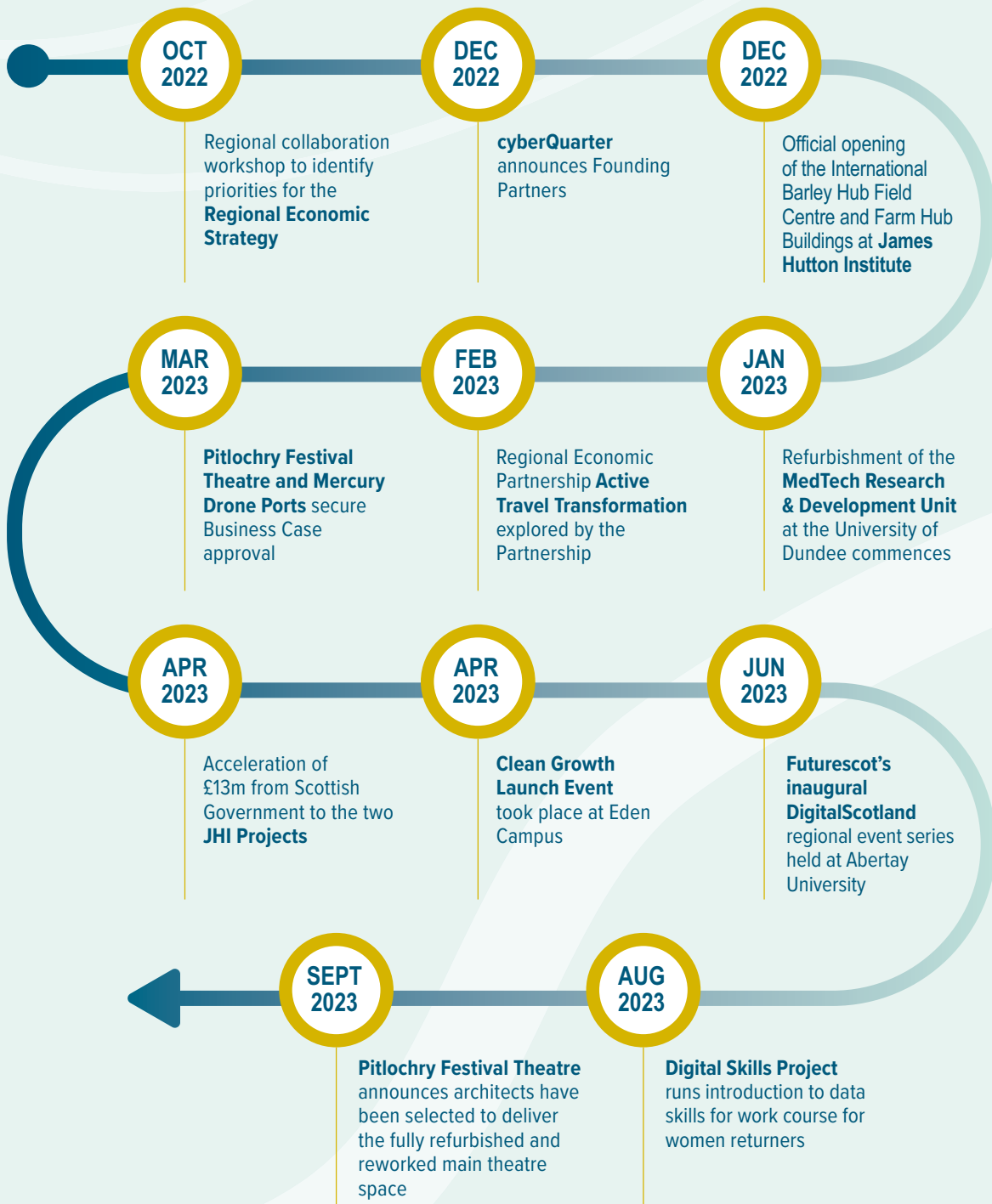


EV Chargers and car port structure are now installed at the **Broxden Low Carbon Hub**



**1,411 jobs** created by Projects since Deal signing

# Summary Timeline



# How we are doing it

## An Empowered & Inclusive Tay

Providing fair opportunities, upskilling, productivity and competitiveness



### The Projects

- Tay Cities Engineering Partnership (£2m)
- Aviation Academy for Scotland (£8.1m)

### The Programmes

- Regional Skills & Employability Development Programme (£20m)
  - Skills Programme Manager (£516k of the £20m Programme)
  - Digital Skills (£4.324m of the £20m Programme)
  - Life Sciences, Biotechnology and Medical Technology (£1.975m of the £20m Programme)
  - Upskilling of SMEs (£2.47m of the £20m Programme)
  - Hospitality (£2m of the £20m Programme)

## An Innovative & International Tay

Increasing research and development opportunities both regionally and globally. Creating opportunities within hospitality, tourism and improving our quality of life, lifestyle and environment



### The Projects

- International Barley Hub (£35m)
- Advanced Plant Growth Centre (£27m)
- Eden Campus (£26.5m)
- Growing Tay Cities Biomedical Projects Cluster (£25m)
- cyberQuarter (£11.7m)
- Just Tech (£15m)
- Studio Dundee (£3m)
- Project Beacon (£5.2m)
- Perth Innovation Highway (£5m)
- Stretch Dome Simulator (£300k)
- Perth Museum (£10m)
- Innerpefferay Library (£100k)
- Crieff International Highland Centre (£1m)
- Aero Space Kinross (£1.6m)

### The Programmes

- Regional Culture & Tourism Investment Programme (£37m)
  - Pitlochry Festival Theatre (£10m of the £37m Programme)
  - Hospitalfield (£2.5m of the remaining £37m Programme)
  - Discovery Point Transformed (£5.5m of the remaining £37m Programme)
  - Advanced Manufacturing Programme (£8m)

### The Fund

- Angus Fund (£26.5m)
  - Mercury Drone Ports (£1m of the remaining £26.5m Programme)
  - CASI Programme (£15m of the remaining £26.5m Programme)
  - Angus Rural Mobility Hub (£2.9m of the remaining £26.5m Programme)
  - Connecting Montrose (£2.6m of the remaining £26.5m Programme)
  - Zero Four (£2m)
  - Low Carbon Housing (£3m)

## A Connected Tay

Includes public transport and digital connectivity



### The Projects

- Perth Bus & Rail Interchange (£15m)
- Dundee Airport Investment (£9.5m)
- 5G Digital Testbeds (£2m)
- Rural Angus and Rural Perth & Kinross High Speed Broadband (£2m)

### The Programmes

- Low Carbon Transport & Active Travel Hub Programme (£3.5m)
  - Phase 1: Broxden Low Carbon Travel Hub (£635k of the £3.5m Programme)
  - Phase 2: Perth Active Travel Hub (£1.265m of the £3.5m Programme)
  - Phase 3: Hydrogen Refueling Station (£1.6m of the £3.5m Programme)

# What we are doing



**490,000+**



**people**, or about 10% of the country's population, live in the area covered by Tay Cities Deal



**£30.1m**

An Empowered & Inclusive Tay

**£237.9m**



An Innovative & International Tay (includes Culture & Tourism)



**£37m**

Regional Culture & Tourism Investment Programme

Secure over

**6,000 jobs**



**£20m**



Regional Skills & Employability Development Programme



**£700m**

investment, including **£300m from Governments**



**£26.5m**

Angus Fund



**£8m**

Advanced Manufacturing Programme

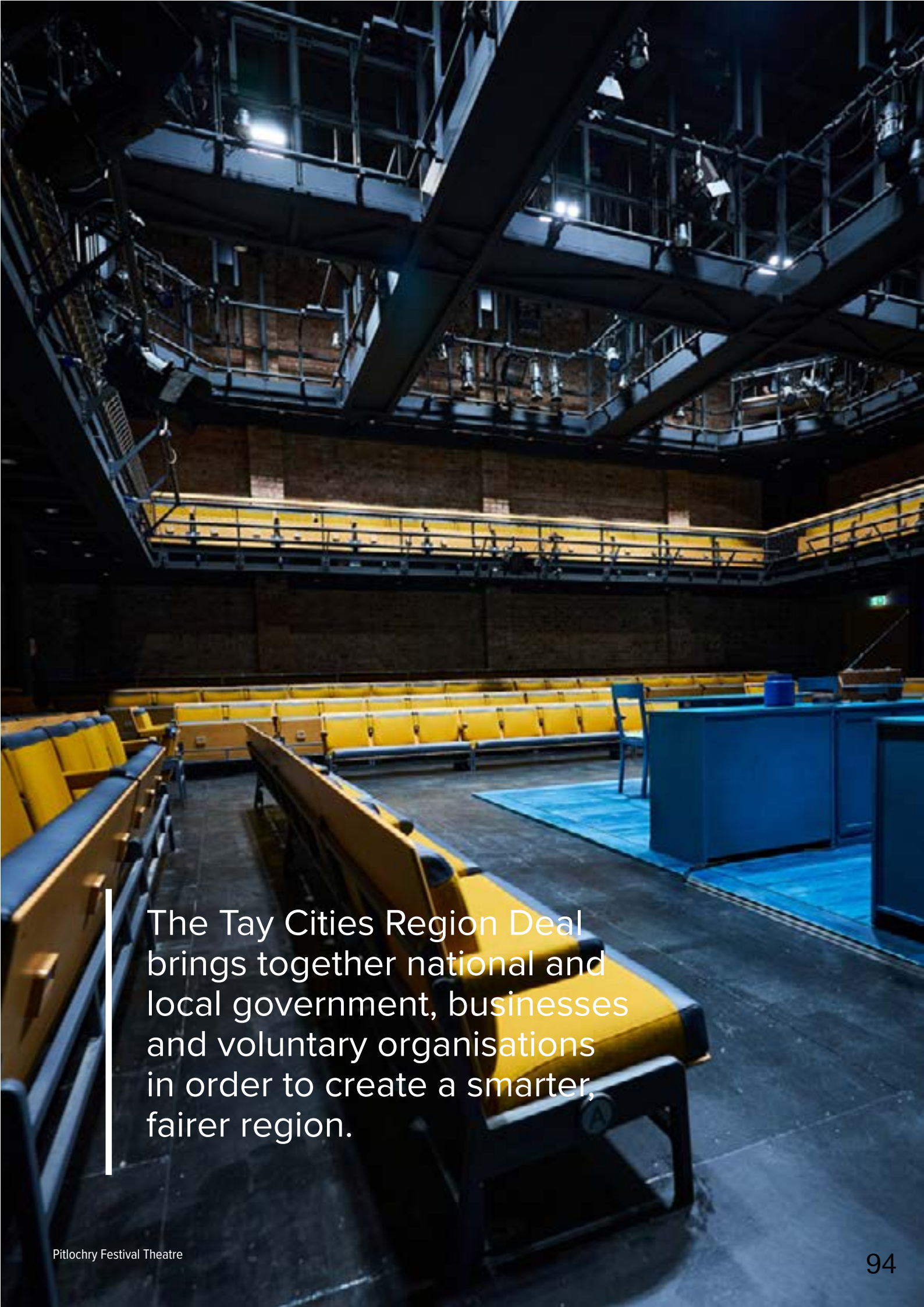


**£32m**

A Connected Tay



**Projects & Programmes** across the region



The Tay Cities Region Deal brings together national and local government, businesses and voluntary organisations in order to create a smarter, fairer region.

# Introduction

An Introduction from the 2023 and 2024 Chairs of the Joint Committee



**Cllr Laing**  
Perth & Kinross Council  
(Joint Committee Chair 2023)



**Cllr Ross**  
Fife Council (Joint Committee Vice  
Chair 2023 and Chair 2024)

The Tay Cities Region Deal brings together national and local government, businesses and voluntary organisations in order to create a smarter, fairer region.

The partnerships between UK and Scottish Governments, the local authorities of Angus, Dundee, Fife and Perth & Kinross, the higher and further education sector, business sector, third sector interface bodies, Tactran, VisitScotland, Scottish Enterprise and Skills Development Scotland are succeeding in delivering an array of Projects designed to promote inclusion as part of the Deal's £700 million investment programme.

Tay Cities Region Deal Projects have been affected by inflationary pressures but we have still seen a tremendous amount of progress over the last 12 months.

These include a ground-breaking movie Project at Abertay University that allows actors at separate locations to work together. As well as the next generation of battery technology will benefit from a new battery prototyping facility, or 'dry lab' at the University of St Andrews Eden Campus, helped by UK and Scottish Government funding.

Winners of the Tay 5G Challenge Fund were also announced. This fund aims to support the use of 5G technology in a range of sectors.

At the time of writing 38 Projects, 4 Programmes and 1 Fund of the Deal's Projects and programmes are already delivering growth and driving investment into the area.

To date there has been £231m approved by Governments and the Partnership for investment from the full £300m Deal.

This funding has led to new jobs and new investment across the Tay Cities Region. 2024 looks to be equally exciting, with the opening of Perth Museum, supported with £10 million funding from the UK Government through the Tay Cities Region Deal, just one highlight.

The economic situation remains challenging with the cost of services and materials continuing to rise, albeit at a slower rate. The Joint Committee will continue to monitor these issues. The challenging economic situation makes the success for the Tay Cities Region Deal more important than ever and we will continue to strive towards creating a fairer smarter Tay Cities Region.

The Tay Cities Region Deal was signed on 17th December 2020 by the Tay Cities Partnership and both Governments.



# The Tay Cities Region Deal

## Cities Region Deal Overview

The Tay Cities Region Deal was signed on 17th December 2020 by the Tay Cities Partnership and both Governments. The Deal is a combined investment of £300m from the Scottish and UK Governments over the coming 10 years to deliver benefits over the next 15 years. The Deal is now in Year 4 following a successful three years.



**£300m**  
investment from  
Governments



**£400m**  
Levered investment

Secure over

**6,000 jobs**



The Tay Cities Region Deal<sup>1</sup> will support business growth, develop innovative technologies, enhance productivity, develop skills, and create jobs. Over its lifetime, from Deal Signing in December 2020 to 2035, the City Deal will deliver 2 key outcomes: securing over 6,000 jobs and lever in over £400m of investment.

The Deal follows the Regional Economic Strategy themes of;



**INCLUSIVE**TAY

### Empower & promote inclusion

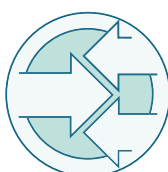
Ensuring that local people have the skills they need to succeed in the modern workplace and growth is inclusive, with a Government investment of up to £30.1m;



**INNOVATIVE**TAY

### Innovate & internationalise

Developing globally recognised clusters of academic and business excellence, with a Government investment of up to £237.9m; and



**CONNECTED**TAY

### Connect

Improving physical and digital infrastructure, with a Government investment of up to £32m.

The Tay Cities Region Deal is comprised of a number of local and regional partners. These include:

- Local Authorities – Angus Council, Dundee City Council, Fife Council and Perth & Kinross Council
- Higher Education and Further Education sector
- Business representatives
- Regional third sector interface bodies
- Scottish Enterprise
- Skills Development Scotland
- Tactran
- VisitScotland

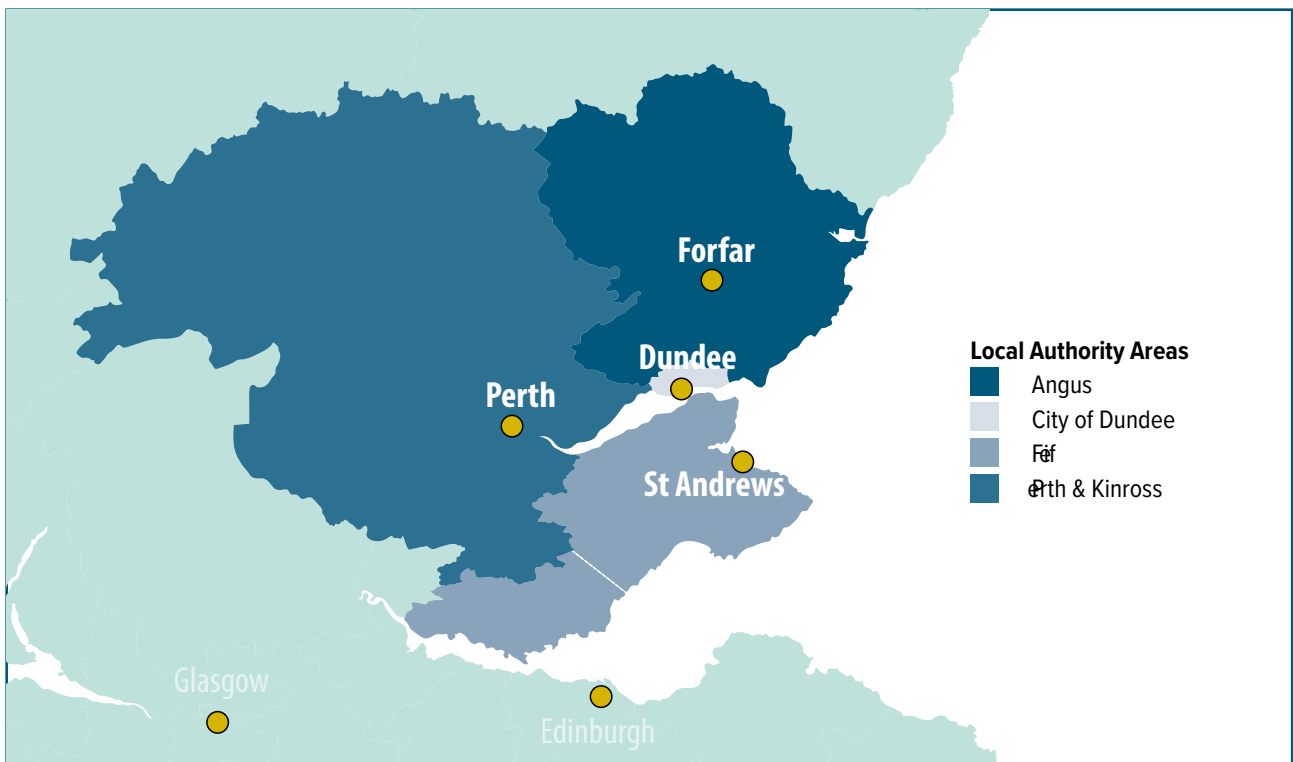
More information on the Deal, including the Projects, is available in the Deal Document<sup>1</sup>

## Geographical Overview

The map below shows the geographical area of the four Local Authorities within the Deal: Angus, Dundee City, Fife and Perth & Kinross. Noting that only North East Fife is included within the Deal, with the remainder of Fife within the Edinburgh and South East City Region Deal.

More information on where the Projects are located can be found on the Deal’s interactive map<sup>2</sup> on [www.taycities.co.uk](http://www.taycities.co.uk)

Diagram 1



<sup>1</sup> [https://www.taycities.co.uk/sites/default/files/tay\\_cities\\_deal\\_doc\\_feb\\_8.pdf](https://www.taycities.co.uk/sites/default/files/tay_cities_deal_doc_feb_8.pdf)

<sup>2</sup> <https://www.taycities.co.uk/publications>

# Financial Statement

The Scottish Government and the UK Government will each invest up to £150 million in the Tay Cities Region Deal (the Deal).

A summary of the Deal investment is shown below in Table 1.

Table 1: Tay Cities Region Deal Financial Summary

Tay Cities Region Deal Thematic Board	Programme/Project	Scottish Government Investment (£000)	UK Government Investment (£000)	Partner Investment (£000)	Total Investment (£000)
<b>An Empowered &amp; Inclusive Tay</b>					
<b>Skills</b>	Regional Skills & Employability Development Programme	20,000	0	0	20,000
	Tay Cities Engineering Partnership	2,000	0	500	2,500
	Aviation Academy for Scotland	0	8,100	0	8,100
<b>An Innovative, International Tay</b>					
<b>Innovative, International</b>	Growing the Tay Cities Biomedical Cluster	25,000	0	119,099	144,099
	International Barley Hub	15,000	20,000	0	35,000
	Advanced Plant Growth Centre	2,000	25,000	0	27,000
	Angus Fund	0	26,500	38,900	65,400
	cyberQuarter	6,000	5,700	5,024	16,724
	Just Tech	0	15,000	0	15,000
	Perth Innovation Highway	0	5,000	17,242	22,242
	Studio Dundee	3,000	0	21,000	24,000
	Advanced Manufacturing Programme	8,000	0	8,000	16,000
	Eden Campus	2,000	24,500	110,394	136,894
	Stretch Dome Simulator	0	300	0	300
	Project Beacon	0	5,200	12,425	17,625
<b>Culture &amp; Tourism</b>	Regional Culture & Tourism Investment Programme <sup>3</sup>	19,000	0	19,000	38,000
	Regional Culture & Tourism Investment Programme – Hospitalfield	5,500	0	5,500	11,000

Tay Cities Region Deal Thematic Board	Programme/Project	Scottish Government Investment (£000)	UK Government Investment (£000)	Partner Investment (£000)	Total Investment (£000)
<b>Culture &amp; Tourism</b>	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	2,500	0	2,500	<b>2,500</b>
	Pitlochry Festival Theatre	10,000	0	10,000	<b>20,000</b>
	Perth Museum	0	10,000	15,217	<b>25,217</b>
	Innerpeffray Library	0	100	0	<b>100</b>
	Crieff International Highland Centre	0	1,000	660	<b>1,660</b>
	Aero Space Kinross	0	1,600	1,285	<b>2,885</b>
<b>A Connected Tay</b>					
<b>Digital</b>	Rural Angus and Rural Perth & Kinross Highspeed Broadband	0	2,000	5,980	<b>7,980</b>
	5G Digital Testbeds	2,000	0	0	<b>2,000</b>
<b>Transport</b>	Low Carbon Transport & Active Travel Hubs	3,500	0	6,874	<b>10,374</b>
	Dundee Airport Investment	9,500	0	400	<b>9,900</b>
	Perth Bus & Rail Interchange	15,000	0	0	<b>15,000</b>
<b>ALL</b>	<b>TOTAL</b>	<b>150,000</b>	<b>150,000</b>	<b>400,000</b>	<b>700,000</b>

Since Deal signing in December 2020, a significant amount of funding has been released to the end of this reporting period.

### Key Headlines

- Since the Deal Signing, £116.2m of funding has been released, including the land transfer value of £3.6m for the International Barley Hub Project.
- Up to the end of September 2023, the Joint Committee approved just under £231m of its awarded funding; this includes £165.4m of funding for Projects and an additional £65.3m of funding for Programmes/Fund which are waiting for Projects to be developed. This equates to over two thirds of the overall Deal funding.
- To the end of September 2023, the Partnership has secured acceleration of up to £33.9m of Government funding against its awarded profiles at Deal signing (£3.9m in 20/21, £9m in 21/22 , £8m in 22/23 and £13m in 23/24).

<sup>3</sup> The full investment of £37m from Governments for the Regional Culture & Tourism Investment Programme includes Hospitalfield, Discovery Point Transformed and Pitlochry Festival Theatre. Therefore, the figure does not include Hospitalfield, Discovery Point Transformed and Pitlochry Festival Theatre as these are shown separately.

Table 2: Summary of claims made to the end of September 2023

Tay Cities Region Deal Thematic Board	Programme/Project	Total Government Investment over Period of the Deal (£000)	Q3 2020 to Q2 2023 funding released (£000)
<b>An Empowered &amp; Inclusive Tay</b>			
<b>Skills</b>	Regional Skills & Employability Development Programme <sup>4</sup>	11,275	0
	Regional Skills & Employability Development Programme – Programme Manager Post	506,220	68
	Regional Skills & Employability Development Programme – Digital Skills	4,324	33
	Regional Skills & Employability Development Programme – Life Sciences, Biotechnology and Medical Technology	1,975	0
	Regional Skills & Employability Development Programme – Upskilling of SME's	2,470	0
	Regional Skills & Employability Development Programme – Hospitality	2,000	0
	Tay Cities Engineering Partnership	2,000	960
	Aviation Academy for Scotland	8,100	0
<b>An Innovative, International Tay</b>			
<b>Innovative, International</b>	Growing the Tay Cities Biomedical Cluster	25,000	9,851
	International Barley Hub	35,000	23,820
	Advanced Plant Growth Centre	27,000	20,912
	Angus Fund <sup>5</sup>	25,500	0
	Angus Fund – Mercury Drone Ports	1,000	300
	cyberQuarter	11,700	5,573
	Just Tech	15,000	0
	Perth Innovation Highway	5,000	0
	Studio Dundee	3,000	0
	Advanced Manufacturing Programme	8,000	0
	Eden Campus	26,500	26,500
	Stretch Dome Simulator	300	300
<b>Culture &amp; Tourism</b>	Project Beacon	5,200	0
	Regional Culture & Tourism Investment Programme <sup>6</sup>	19,000	0
	Regional Culture & Tourism Investment Programme – Hospitalfield	5,500	3,000

Tay Cities Region Deal Thematic Board	Programme/Project	Total Government Investment over Period of the Deal (£000)	Q3 2020 to Q2 2023 funding released (£000)
<b>Culture &amp; Tourism</b>	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	2,500	900
	Pitlochry Festival Theatre	10,000	6,881
	Perth Museum	10,000	10,000
	Innerpeffray Library	100	0
	Crieff International Highland Centre	1,000	0
	Aero Space Kinross	1,600	0
<b>A Connected Tay</b>			
<b>Digital</b>	Rural Angus and Rural Perth & Kinross Highspeed Broadband	1,800	2,000
	5G Digital Testbeds	2,000	440
<b>Transport</b>	Low Carbon Transport & Active Travel Hubs Phase 1 - Broxden Low Carbon Travel Hub	635	486
	Low Carbon Transport & Active Travel Hubs Phase 2 Perth Active Travel Hub	1,265	0
	Low Carbon Transport & Active Travel Hubs Phase 3 – Hydrogen Refueling Station	1,600	0
	Dundee Airport Investment	9,500	600
	Perth Bus & Rail Interchange	15,000	0
<b>ALL</b>	<b>TOTAL</b>	<b>300,000</b>	<b>112,626*</b>

\* Total released is £116.2m. This includes a land transfer for the value of £3.6m for International Barley Hub

<sup>4</sup> The full investment of £20m from Governments for the Regional Skills and Employability Development Programme includes Programme Manager Post, Digital Skills, Life Sciences, Biotechnology and Medical Technology, Upskilling of SME's and Hospitality. Therefore, the figure does not include Programme Manager Post, Digital Skills, Life Sciences, Biotechnology and Medical Technology, Upskilling of SME's and Hospitality as these are shown separately.

<sup>5</sup> The full investment of £26.5m from Governments includes Mercury Drone Ports, therefore, the figure does not include Mercury Drone Ports as this is shown separately.

<sup>6</sup> The full investment of £37m from Governments for the Regional Culture & Tourism Investment Programme includes Hospitalfield, Discovery Point Transformed and Pitlochry Festival Theatre. Therefore, the figure does not include Hospitalfield, Discovery Point Transformed and Pitlochry Festival Theatre as these are shown separately.

# Governance and Accountability

## Governance Structure

The Tay Cities Region Deal partners work collaboratively with both the UK and Scottish Governments as well as regional partners, including representation from private and third sector organisations. The Deal's governance arrangements enable decisions to be taken in an open and transparent way, in one place, for the whole of the Tay Cities region. The Joint Committee established by local authority partners in 2017, is the ultimate regional decision-making body for both regional collaboration and the Deal.

The Joint Committee is supported by a number of bodies which are summarised in Diagram 2 on page 22. More information on the governance structure and its bodies can be found in the Deal Document.

Key changes since September 2022:

- In March 2023, the Partnership and Governments approved the second Tay Cities Region Deal Benefits Realisation Plan. This document supports on going monitoring and evaluation of the Deal and will be updated annually.
- The Management Group and Joint Committee chair rotated from Angus Council to Perth & Kinross Council in December 2022.

## Regional Collaboration

### Regional Strategy Refresh

This reporting period has seen the focus on Regional Collaboration change to build upon the foundations set by the Tay Cities Region Deal Projects. Partner vision sessions in 2022/23 led to a presentation to the September Joint Committee on the proposals to refresh the Regional Economic Strategy 2019-2029.

The objective for the refresh is:

- To develop a refreshed, repositioned Regional Economic Strategy which aligns with priorities within the City Region Deal and looks beyond the Deal.
- The 2019 Regional Economic Strategy has been used as the economic strategy for Local Authorities. It was developed pre-signing of the Deal, and content reflects this time period.
- There has been significant broader economic change since 2019, with the pandemic, EU Exit and national economic factors, together with programmes of activity now starting.
- The future focus will be on measuring and addressing economic performance
- The structure will broadly be retained, with a focus on the visitor economy, cultural and creative economy, food & drink, energy, life sciences, foundational economy and underpinning/cross cutting themes of Clean Growth, transportation, and digital.

Future milestones:

- Complete draft by March 2024
- Approval June 2024
- Delivery plan worked up over first six months of 2024.

### **Cross Cutting Theme - Clean Growth**

Gillian Martin MSP, Minister for Energy, launched a new online platform to accelerate Clean Growth across Tayside's economy at the University of St Andrews Eden Campus, 19 April 2023. Part of the Tay Cities Region Deal, the launch of the [www.taycitiescleangrowth.scot](http://www.taycitiescleangrowth.scot) website established an online community designed to enable and encourage businesses, industry and academia to collaborate and push low carbon and clean growth innovation, while driving investment within the region.

The Tay Cities Clean Growth website showcases the mix of clean growth Projects within and beyond the Tay Cities Region Deal. It is designed to enable wider Project development, knowledge exchange and research and development collaboration, as well as create a positive environment for investor engagement. The Tay Cities Region has particular clean growth strengths in sustainable mobility, green Agri-tech, clean energy, the circular economy and data and digital solutions. The Tay Cities Clean Growth Initiative includes Projects funded via the Tay Cities Region Deal.

Current Projects:

- **Michelin Scotland Innovation Park**
- **Mercury Programme – Enabling Infrastructure in North Angus**
- **Angus – Centre for Agricultural Sustainable Innovation**
- **Perth Smart Energy Network**
- **Angus Zero Four Business Park**
- **Angus Rural Mobility Hub**
- **Mercury Drone Port, Montrose**
- **James Hutton Institute - International Barley Hub and Advanced Plant Growth Centre**
- **Eden Campus and Stretch Dome Simulator – St Andrews University**
- **Project Beacon**
- **Perth Innovation Highway**
- **Perth Eco Innovation Park**
- **Low Carbon Transport & Active Travel Hub Perth**
- **Perth Smart Energy City Programme**
- **Binn Eco Innovation Park**

A second Clean Growth Community event was held on 26 September 2023 - this event focused on:

- Clean Energy (wind to small scale green hydrogen generation)
- Green Agri-tech and Agri innovation

Skills Assessment Clean Growth Skills for Tay Cities region was commissioned by Scottish Enterprise on behalf of the regional partners in 2023. The study's recommendations will underpin a potential skills roadmap of proposed activities and timescales for Scottish Enterprise and strategic partners in the Tay Cities Region to consider and implement.



## Cross Cutting Theme Digital

The focus of the Digital Thematic Board has changed – it is no longer just about City Region Deal Projects but increasingly on digital infrastructure and regional digital economy. Representatives from relevant national organisations have joined the Board to help drive this focus. The Board has also regularly engaged with commercial investors to better understand their investment strategies and requirements.

### Digital Infrastructure

Regional Partners successfully completed the Infralink Exchange Project that was led by Scottish Futures Trust in April 2023. The partners presented their experiences to the other regions who took part in this programme, raising the region's profile.

It helped the regional local authorities improve their digital connectivity by better engagement with the mobile industry. Collectively the Project team developed its Infralink-Exchange Playbook. The Infralink-Exchange Playbook is a 'how-to' guide allowing public sector bodies to begin a Project that improves mobile connectivity through commercial and GIS-based transformation. This best practice guide including case studies, templates and points to note, is a key output from the Scotland 5G Centre and DCMS investment in the Infralink programme. The best practice guidance is sustainable and can be applied nationally to drive a wellbeing economy through better mobile connectivity.

Building on that Project, the regional partners submitted a Tay Cities bid for 5G Innovation Regions (5GIR) funding in September 2023. If successful, the Tay5G+ Project will build upon the foundation set by the Tay Cities Region Deal (TCRD) Tay5G Project.

### Regional Digital Economy

Scottish Enterprise commissioned research into the regional digital/tech ecosystem with recommendations to strengthen this for greater economic value to the region. The launch of the Techscaler and Abertay cyberQuarter provide new opportunities to build on. The TCRD Digital Skills Project provides opportunities for collaboration in that area too.

### Regional Transport Strategy

The Tayside and Central Scotland Regional Transport Strategy (RTS) is a statutory plan identifying strategic transport priorities for the Angus, Dundee City, Perth & Kinross and Stirling Council areas which support local, regional and national environmental, social and economic objectives. The third iteration of the plan covering the period 2024-2034 is currently being developed in partnership with the respective local and regional partners. During 2022/23 the development work included consulting on objectives, outcomes and the impacts of potential measures. In particular, discussions were held on the implications for local and regional partners of delivering the plan. Key themes emerging from these discussions included:

- That step changes in activity will be required by all agencies if national aspirations are to be achieved, the status quo will not deliver the national aspirations.
- The step changes required included better co-ordination and focus of activity on those areas and population groups who require the most support to change travel behaviour and/or access employment, education and services to help achieve the national aspirations (especially in regard to national climate change and child poverty targets).
- These step changes, and the urgency behind the targets means that strong and declared political support will be required. A draft strategy is being consulted on during summer/autumn 2023. It is then hoped that a final strategy will be submitted to the Minister for Transport in spring 2024.

## Regional Skills Investment Plan

The Skills Advisory Board have held several workshops to look at regional collaborative working, using the Regional Economic Strategy and Regional Skills Investment Plan as a basis for discussion. Several priority areas have emerged for the group:

- Streamline the regional skills system
- Reduce duplication, fragmentation
- Increase agility to respond to shocks
- Increase accessibility for beneficiaries
- More effective, better engagement with employers, building on Developing Young Workforce (DYW)
- Young people & beneficiaries better prepared, “job ready”
- To date we have set up a No One Left Behind Regional Group that is streamlining the data for the region
- Furthermore, DYW have over 60 events planned and have written a Young Persons Guarantee. It's this in school piece that we are looking to make bigger particularly around employer engagement. Moving forward the group will be looking at sector initiatives in Health and Social Care and Green skills whilst looking to anchor institutions around Community Wealth Building. The Health Academy has been a success and we are looking at expanding the offer in Perth and Angus.

## Regional Tourism Strategy

The Tay Cities Region Tourism Strategy was officially launched in September 2019. The strategy process took place during 2018 and 2019 and included workshops and consultation with industry and other key stakeholders. Intended to create a strategic link between national and local tourism strategies, the document identified the region's key strengths (the regional connectors) and the strategic themes which can most effectively be addressed at a regional level. The strategy highlights the three regional connector themes as outdoor adventures, culture & creative and food & drink.

With COVID-19 severely impacting all aspects of society and the economy from March 2020, the focus of industry, local authority and other stakeholder efforts had been on survival, support and then recovery. Even within this activity the regional partners continued to meet and many of the actions identified in the strategy were moved forwards, whether at a regional level or at a destination level which contributes to regional impact. A mid-term summary of activities delivered to date was produced in May 2022.

Looking ahead to 2024, regional working will focus on two areas:

1. **Collaboration:** Regional Tourism Leadership Group, which comprises the Chairs of the four industry-led tourism forums, the local authority tourism leads and Visit Scotland, continues to meet three times a year. The aim of this group is to strengthen collaboration and knowledge sharing across the region and identify areas of commonality. A tourism officers group also continues to meet on a regular basis, where opportunities to share ideas and opportunities are identified.
2. **Internationalisation:** under the ‘Scotland's Tay Country’ title, this successful programme of work focuses on raising awareness of the region with travel trade intermediaries (travel agents, tour operators and destination management companies). This lifts the profile of the region beyond Scotland, provides additional business channels for tourism businesses and develops

a sustainable route to the international markets. This activity is funded through UK Shared Prosperity Fund, and comprises three areas:

- Increasing bookable product available to travel trade: working with tourism businesses to understand how to work with travel trade by providing suitable and commissionable experiences and products.
- Facilitating opportunities for tourism businesses to meet travel trade to drive direct sales, using VisitScotland, VisitBritain and UK Inbound as channels.
- Raising profile of the region and the products available with travel trade: attendance at travel trade exhibitions, the development of itineraries as examples of what is on offer in the region and the arrangement of familiarisation trips for inbound agents to experience the product firsthand.

### **Regional Economic Partnership Network**

The Scottish Government organises regular meetings of the Regional Economic Partnership Network (REPN), and the Tay Cities Partnership is represented at these meetings by the Chair of the Heads of Economic Development Group. During 2023, two meetings of the REPN were held, including a whole day workshop, to explore the establishment of Regional Economic Intelligence Hubs to assist with data-based decision making.

### **National PMO Networking Group**

The Tay Cities Region Project Management Office (PMO) continues to lead and provide the secretariat for a National PMO Networking Group, which includes representation from Regional and Growth Deals from across the UK. The group aims to share best practice and exchange guidance, use the platform for presentations from various organisations and utilise the knowledge of its members to start sub-groups specific to enhancing City & Growth Deals.

There have been a number of short and longer-life sub-groups established to date including the:

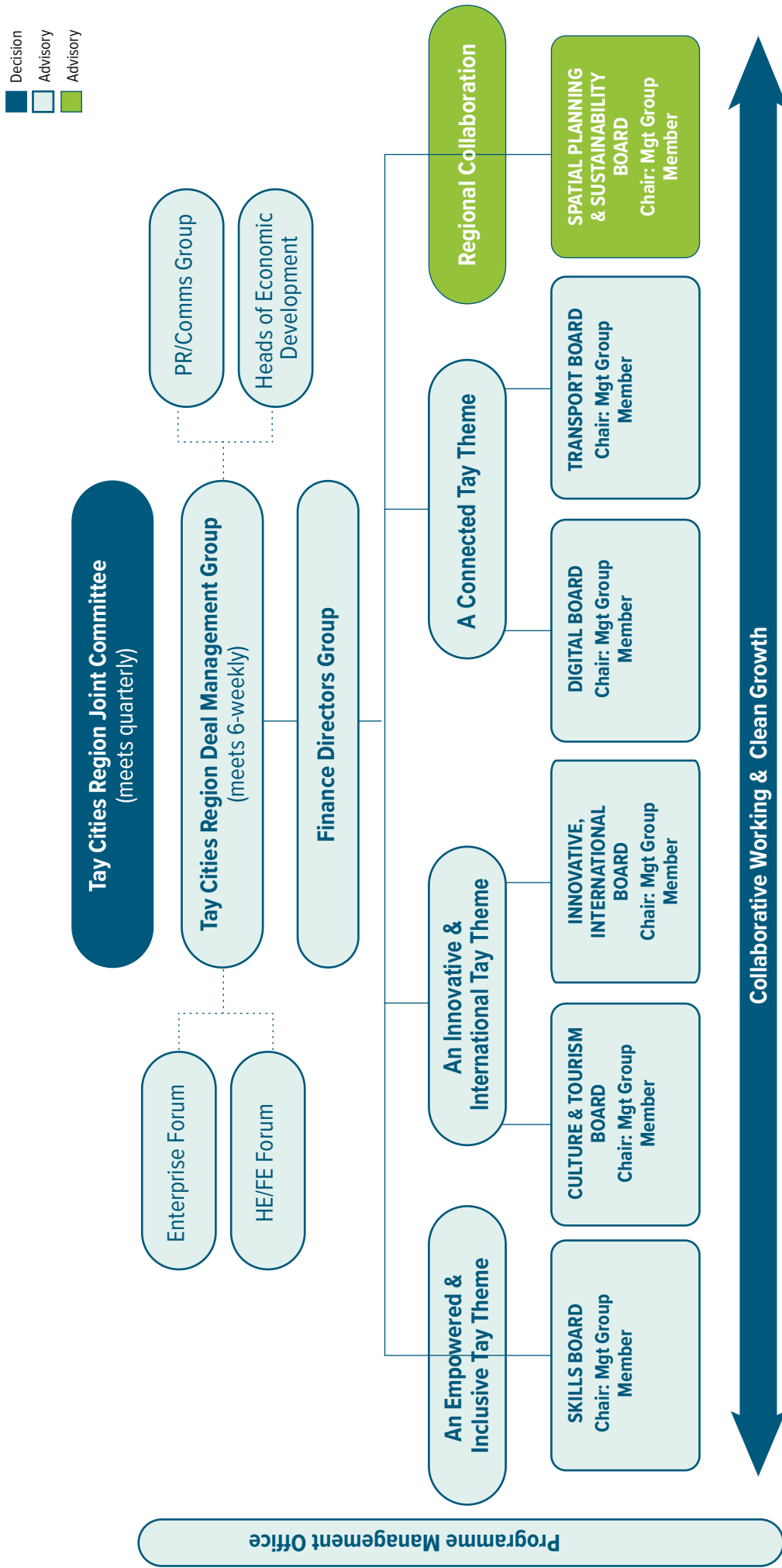
- Decarbonisation sub-group
- Benefits Realisation sub-group
- Subsidy Control sub-group
- Systems sub-group
- SharePoint sub-group
- Finance sub-group.

The wider network and various sub-groups are a valuable source of information and opportunity to share knowledge and expertise.

The PMO have also helped to coordinate the following presentations at meetings:

- Historic Environment Scotland Attendance in October 2022 on inflation and climate pressures
- Scottish Fire Service Attendance in October 2022
- NHS Scotland attendance in October 2022 on workforce planning
- Green Book Training with the HM Treasury February 2023
- Scottish Government attendance, including in June 2023 to discuss the new Subsidy Control legislation.

Diagram 2: Tay Cities Region Deal Governance Structure



# Tay Cities Communications & Press

The Communications Group is comprised of representatives from the PMO, UK and Scottish Governments, universities and colleges central to the Deal and local authorities and meets every two months to ensure all are informed of comms planning and outcomes.

To assist with all communication and press opportunities, the Partnership have developed a protocol for all Programmes and Projects to use as guidance for press and publicity. The Tay Cities Region Deal Communications Protocol, as agreed at Deal Signing, has a commitment to be refreshed annually.

The Communications Group reviewed the Protocol in Spring 2023 and agreed it continued to serve its purpose and ensured effective communication between all parties.

## Press Releases

Projects gaining media attention over the 2022-23 period have included:

- Launch of the International Barley Hub Field Centre at the James Hutton Institute
- NHS Drone Delivery Service Trials begin in Angus
- First glimpse of how £5.9m new Angus Rural Mobility Hub could look
- [Visit of Lord Offord to the Eden Campus Battery Lab](#)
- [Abertay CyberQuarter Welcomes First Founding Partners](#)
- [5G uses Case Trial Filming Breakthrough](#)

## Story Matrix

As part of the Deal Document commitment and the PR & Comms Protocol, the Partnership has a commitment to develop a Story Matrix. The Story Matrix will consist of a library of case studies and progress of the benefits delivered by TCRD Projects. This can be used in future press releases and updates. It will be informed by and inform the Annual Performance Report.

## Q&A

Another commitment of the PR & Comms Group is to hold a Q&A of frequently asked questions. The Group will continue to review this on an annual basis, or as required.

The Deal is comprised of 1 Fund, 4 Programmes and 38 Projects. Within the Programmes and Fund, there will be additional Projects emerging as the Deal progresses.



# The Deal

This section of the Annual Performance Report summarises the Projects that have entered into the implementation stage following full Government and Joint Committee approval, up to and including September 2023. The Projects are categorised by Tay Cities Region Deal themes and are aligned to the Implementation Plan, with any updates to milestones and risks highlighted.

Monthly forecasting and quarterly performance reports are prepared by the PMO with input from Projects throughout the year and shared with Governments and Management Group. This provides interim updates.

## Status of Fund, Programmes and Projects

The Deal is comprised of 1 Fund, 4 Programmes and 38 Projects. Within the Programmes and Fund, there will be additional Projects emerging as the Deal progresses. Table 3 below shows an overview of the status of the Programmes and Projects up to the end of September 2023.

Table 3: Status of Funds, Programmes and Projects up to end of September 2023

Programme/Project	Location	(Expected) Full Business Case Approval	Stage
<b>An Empowered &amp; Inclusive Tay</b>			
Regional Skills & Employability Development Programme	Regional	11 March 2022	Implement/Define (Phase 2)
Regional Skills & Employability Development Programme – Skills Programme Manager Post	Regional	11 March 2022	Implement
Regional Skills & Employability Development Programme – Digital Skills	Regional	December 2022	Implement (Phase 1)
Regional Skills & Employability Development Programme – Life Sciences Further Education: Biotechnology and Medical Technology	Regional	June 2023	Define
Regional Skills & Employability Development Programme – Supporting SME Skills	Regional	June 2023	Define
Regional Skills & Employability Development Programme – Hospitality Skills	Regional	March 2023	Define
Tay Cities Engineering Partnership	Regional	11 March 2022	Implement
Aviation Academy for Scotland	Regional	September 2023	Define
<b>An Innovative, International Tay</b>			
Growing the Tay Cities Biomedical Cluster	Dundee	19 February 2021	Implement
International Barley Hub	Perth & Kinross	19 March 2021	Implement

Programme/Project	Location	(Expected) Full Business Case Approval	Stage
Advanced Plant Growth Centre	Perth & Kinross	19 March 2021	Implement
Angus Fund	Angus	19 February 2021	Implement
Angus Fund – CASI Programme	Angus	March 2023	Define
Angus Fund – Mercury Drone Ports	Angus	March 2023	Implement
Angus Fund – Angus Rural Mobility Hub	Angus	March 2023	Define
Angus Fund – Zero Four	Angus	-	Define
Angus Fund – Housing Project	Angus	-	Define
Angus Fund – Road Project	Angus	-	Define
cyberQuarter	Dundee	18 June 2021	Implement
Just Tech	Dundee	2024/25	Define
Perth Innovation Highway	Perth & Kinross	September 2023	Define
Studio Dundee	Dundee	2023/24	Define
Advanced Manufacturing Programme	Regional	2023/24	Define
Eden Campus	Fife	21 August 2020	Implement
Stretch Dome Simulator	Fife	17 December 2021	Deliver
Project Beacon	Perth & Kinross	2025/26	Define
Regional Culture & Tourism Investment Programme	Regional	19 June 2020	Define
Regional Culture & Tourism Investment Programme – Hospitalfield	Angus	17 July 2020	Implement (phase 1)
Regional Culture & Tourism Investment Programme – Discovery Point Transformed	Dundee	23 April 2021	Implement (phase 1)
Pitlochry Festival Theatre	Perth & Kinross	March 2023	Implement
Perth Museum	Perth & Kinross	19 March 2021	Implement
Innerpefferay Library	Perth & Kinross	2028/29	Define
Crieff International Highland Centre	Perth & Kinross	2028/29	Define
Aero Space Kinross	Perth & Kinross	March 2023	Implement
<b>A Connected Tay</b>			
Rural Angus & Rural Perth & Kinross Highspeed	Angus and Perth & Kinross	18 June 2021	Deliver
5G Digital Testbeds	Regional	11 March 2022	Implement
Low Carbon Transport & Active Travel Hubs Programme	Perth & Kinross	1 July 2022	Implement
Low Carbon Transport & Active Travel Hubs Phase 1: Broxden Low Carbon Transport Hub	Perth & Kinross	1 July 2022	Implement



Programme/Project	Location	(Expected) Full Business Case Approval	Stage
Low Carbon Transport & Active Travel Hubs Phase 2: Perth Active Travel Hub	Perth & Kinross	September 2023	Define
Low Carbon Transport & Active Travel Hubs Phase 3: Hydrogen Refueling Station	Perth & Kinross	2024/25	Define
Dundee Airport Investment	Dundee	19 February 2021 (revenue)	Implement (revenue)
		March 2024 (capital)	Define
Perth Bus & Rail Interchange	Perth & Kinross	2025/26	Define

Stage No.	Definition
1. Define	Business case being developed, and not yet approved by Joint Committee
2. Implement	Business case has been approved by Joint Committee, and is being implemented. In a capital Project, this may be construction; for skills Projects this may be establishing/delivering a course
3. Deliver	Project is in place and monitoring and evaluation is in framework to assess if it is achieving its objectives.
4. Legacy	Project has resulted in mainstreaming or improvements to business as usual (impact) that is generated beyond the funded period

The Projects which have received Full Business Case approval from Joint Committee in this reporting period are listed below;

- Regional Skills & Employability Development Programme – Digital Skills
- Angus Fund – Mercury Drone Ports
- Pitlochry Festival Theatre
- Aero Space Kinross

The following information provides a snapshot of progress throughout the year and are shown by Tay Cities Region Deal theme.



# £30.1m

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## An Empowered & Inclusive Tay

### Skills

Within the Skills theme there is 1 Programme; the Regional Skills and Employability Development Programme, of which there are 5 Phase 1 Projects, and 2 Projects; Tay Cities Engineering Partnership and Aviation Academy for Scotland.

The Skills Programme, Digital Skills and Tay Cities Engineering Partnership Projects have all received Full Business Case approval. The Skills Programme continues to develop Projects and it is anticipated that two further skills Projects will be approved by the end of 2023/24.



## Regional Skills & Employability Programme

**Programme Owner:** Perth & Kinross Council

**Enabling the region to...:** Empower & Promote Inclusion

**Thematic Board:** Skills



### Programme Description

The Skills and Employability Development Programme sets out the partnership's proposition to bring about the changes in skills and employability services that will support this vision and make a positive, tangible difference to our citizens, businesses and other stakeholders.

The Programme will make incremental changes to improve the currently complex and weakly-connected regional employability and skills landscape to deliver better outcomes for all, particularly those people facing significant disadvantages to securing and sustaining meaningful, high-quality employment. Up to £20 million City Deal investment available will help develop a new collaborative, pan-regional approach and put necessary interventions in place to drive improved economic performance and inclusion across the region.

The investment will also help drive up skill levels and productivity across the region through developing employment, training, and skills development opportunities. The direct impact of this investment will be an incremental reduction in unemployment and economic inactivity among Programme beneficiaries across the region, employers reporting fewer skills shortages and gaps, and citizens able to access the training and employability support they need to succeed within the workplace.

### Headline Achievements

The Programme received Full Business Case approval from the Joint Committee on 11th March 2022. To date, the Programme has achieved the following:

- Highlighting groups with protected characteristics to the Skills Advisory Board. Presentations have been provided by organisations that support, women, people with disabilities, refugees and those furthest from the job market.
- The Skills Programme has implemented a Delivery Group, that supports Projects with the business case approval process and to share gained experience. The Delivery Group is attended by the Skills Programme Project Managers and support staff and has proved to be a valuable tool in supporting the delivery and approval of Projects.

### Key Milestones & Progress

In order to achieve the aims for the programme, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023:

Milestone	Due Date
Approval and start of first tranche of Projects. Content, outcomes and baselines to be defined in Project business cases: <ul style="list-style-type: none"> <li>• Specify community benefits.</li> <li>• Target significant pockets of need.</li> <li>• Biotech and Med-tech training: deliver in excess of 400 employees for the industry over the lifetime of the Project, growing from 25 being trained in first year.</li> <li>• Hospitality Training: Support 400 businesses and train 2,000 individuals, resulting in 500 people moving into new roles across the sector with 90% of those achieving Real Living Wage, over the life of the Project.</li> <li>• Digital Skills: creating or safeguarding 1,200 jobs via support for 800 individuals directly and another 800 through working with 200 organisations across the life of the programme.</li> <li>• Supporting SMEs across the region: working with 40 SMEs per annum and training 500 individuals over the life of Project.</li> </ul>	2023/24
Approval and start of second tranche of Projects. Content and outcomes to be defined in Project business cases.	2023/24
Assessment, review and evaluation of Projects to ensure they flexibly respond to emerging labour market needs within the City Deal region and deliver specific Project aims and objectives detailed within Project business cases.	2023/24

### Key Risks

Risk	Mitigation
Lack of buy in from partners in developing a collaborative, regional delivery system.	Ensure signed agreement from all partners, clearly setting out their roles and responsibilities. A Programme Manager was appointed in 2022 to mitigate this.

Risk	Mitigation
Lack of buy-in to / poorly attended Skills Advisory Board.	Secure sign-up to the Skills Advisory Board terms of references from all partners for regular engagement, and clearly set out their roles and responsibilities.
Potential for actual spend to slip against profiled spend.	Ongoing engagement between all Project leads and key stakeholders. All Projects required to complete individual five case OBCs, including robust financial detail outlining spend profile and cost profile. Financial updates will become part of the monitoring and evaluation process.
Potential for Projects to be delayed in the development phase (phase 1).	Regular updates are provided at the Skills Advisory Board around the progress of individual Projects. If appropriate, these will be escalated to the PMO and TCRD management group.
Potential for Projects to be delayed in the development phase or not meet the programme objectives (phase 2 and beyond).	The Skills Advisory Board will develop a monitoring and evaluation process to ensure overall programme objectives are captured.

£516k



## Regional Skills & Employability Programme Manager

**Programme Owner:** Perth & Kinross Council

**Enabling the region to...:** Empower & Promote Inclusion

**Thematic Board:** Skills



### Programme Description

The Skills Programme Manager Post will support the Regional Skills Programme. The Post will be critical in driving the strategic agenda and ensure delivery activity remains consistent with the overall Programme business case, the strategic context of the Deal and with the ambitions of partners, stakeholders, and citizens. An important aspect of the role will be building consensus and collaboration across the region's four local authorities and other relevant stakeholders (e.g. FE and HE institutions, and local employers) on the future direction and focus of regional skills activity, ensuring this effectively compliments and enhances existing local and national Programmes.

This collaboration activity will be developed in a number of ways, including through discussion at the Skills Advisory Board, through linking in with the Heads of Economic Development Group, and liaising individually with the various Council Employability and Skills Leads. A key part of this role will be to identify areas of potential collaboration and joint working and lead on their development and implementation, through building relationships with key partners such as those outlined above, regular and meaningful communication with these (and other relevant) partners.

### Headline Achievements

To date, the Programme has achieved the following:

- The Skills Programme Manager is working closely with the Local Authorities to support the skills gaps identified as they look to implement their Local Heat and Energy Efficiency Strategies (LHEES).

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Supporting the Programme refresh and liaison with all Projects	2023/24

### Key Risks

Risk	Mitigation
Risk of Projects not delivering through lack of buy-in from employers or other	Mitigation by the programme manager by raising through the governance structure. Project leads and Programme manager should raise at the thematic board and any necessary change management process adopted.
Inability to influence the activities of partners and failure to achieve collaboration and joint working	Mitigated by creating frequent engagement and communication to encourage open and honest channels where partners can raise concerns at a senior level with the Skills Advisory Board and the Management Team where such issues could be discussed and resolved.
A single role creates a “key man” risk where there is no back up.	Mitigated against through well-defined channels of communication, frequent updates, and sharing of files (as appropriate) and best practice among partners to ensure that all partners are fully briefed, and short-term resource can be found should long-term absence or early departure occur.

£1.539m



## Regional Skills & Employability Development Programme – Digital Skills

**Project Owner:** Fife Council

**Enabling the region to...:** Empower & Promote Inclusion

**Thematic Board:** Skills



### Project Description

This Project has been selected by the Regional Skills and Employability Development Programme and awarded up to £4.324m. The Project will have two distinct tranches: Tranche 1 from 2022-2025, and Tranche 2 up to 2029. This BJC relates to Tranche 1 and the investment of £1.539m. This Project will deliver a new collaborative, regional approach to digital skills. This will provide clear, integrated, and inclusive progression routes into digital and data careers. It aims to support the regional labour market through skilling, re-skilling and upskilling in digital skills, building activities with opportunity in-mind.

### Headline Achievements

The Project received Full Business Case approval from the Joint Committee on the 9th December 2022. To date, the Programme has achieved the following:

- The Tay Cities Region Deal Digital Skills Project launches pilot programme aimed at supporting 16 - 24-year-olds into Software Development.
- The Tay Cities Region Deal Digital Skills Project partners with The Data Lab Scotland investing £50,000 to support 100 individuals gain Data Skills through the Data Lab's Data Skills for Work Programme.



## Key Milestones & Progress

Milestone	Due Date
Joint recruitment with SDS regionally/locally – for tech and digital economy sectors	2025
Tailored regional digital skills delivery Programme	2025
Delivery of Data Driven Innovation (DDI) CPD resources for education and refine education strategies	2025

## Key Risks

Risk	Mitigation
Risk of slow delivery due to delays in procurement of interventions.	Project to have a direct contact at Procurement to agree process, with long term procurement plan to be developed with Fife Council Procurement.
Risk that the delivery of 2023 academic milestones are not met.	Working with FE/HE to deliver short, targeted programmes of delivery to increase draw down.
Risk Project may not be able to show progress and delivery on objectives.	Fife Council manages a similar Project for the ESES City Region Deal's IRES programme. The processes for capturing data and financial management from that will be adopted for the Digital Skills Project.

## CASE STUDY

In a rapidly evolving landscape where digital literacy and data skills have become integral across all sectors, the acquisition of data skills has the potential to open doors to a multitude of employment opportunities. Fife College recognised this, and, in collaboration with Data Skills for Work at The Data Lab and supported by the Tay Cities Region Deal Digital Skills Project, they ran an Introduction to Data Skills for Work Bootcamp for women returners.

The free 3-day online course was geared towards women living in the Tay Cities Region who earn less than £24k a year and was designed to give participants foundational data tools to help them flourish in an increasingly digitalised, automated and data-driven world whilst supporting them in their personal and professional growth. The course helped prepare women for a career or further educational pursuits. By participating, women were afforded the opportunity to assess their existing digital literacy levels, cultivate a suite of digital proficiencies applicable to daily tasks, gain insights into the practical applications of data, acquire the ability to decipher data across various formats, and become adept at utilising a diverse array of tools and methodologies for data analysis.

Participants completed the course with the necessary skills and confidence to adapt and thrive in the workplaces of today and tomorrow. One participant, who was one of those who took part in the course said: *“The course was great. I used the course as an audit to build my confidence and to see if there were any data skill areas that I needed more work on. I found it empowering to be able to audit my skills and see what I know and pinpoint things that I do not know. Overall, I come away from the course feeling extremely pleased that I participated. I like that I was with other women returners. I liked seeing how the curriculum was put together. I like data, I like working with data, so I liked the theme of the course.”*

£2m



### Tay Cities Engineering Partnership

**Project Owner:** Dundee & Angus College

**Enabling the region to...:** Empower & Promote Inclusion

**Thematic Board:** Skills



#### Project Description

The Scottish Government will commit up to £2 million to the Tay Cities Engineering Partnership (TCEP), which will drive up the skills and technology base of the sector to make it more competitive in an international marketplace and accelerate the pace of research and development. It will do this by bringing together the resources of key private and public engineering facilities in a new collaboration. TCEP will drive the transformation of manufacturing processes needed to ensure the sector remains competitive, such as the implementation of robotics and artificial intelligence; increased internationalisation; increased productivity; research and development and skills development. It will achieve this by increasing the profile of engineering as a career opportunity, developing training places and providing business support. Specifically, it will:

- Create a Mobile Engineering Technology Unit to showcase Engineering and Advanced Manufacturing (EAM) and science, technology, engineering and mathematics (STEM) subjects. This will raise the profile of these subjects, increase careers awareness and address possible negative perceptions. The Unit will be fitted out with robotics and virtual reality technology to create opportunities in EAM and STEM from early years through both primary and secondary schools, into further and higher education and on to the workplace;

- Develop new foundation and graduate level apprentice training places to meet skills demand and enhance employability, career development and staff up-skilling;
- Develop enhanced up-skilling programmes to meet the emerging requirements of new sectors;
- Create an EAM Centre of Excellence equipped with leading industry tools to trial, test and demonstrate new processes and equipment; and
- Create a Product Innovation Lab, located within the Aviation Academy for Scotland, to support businesses bringing new products to market. The Lab will offer cost-effective product prototyping and testing, as well as mass production (but at low volumes to suit new products) and specialist incubator and product development support.

### Headline Achievements

The Project received Full Business Case approval from the Joint Committee on 11th March 2022. To date, the Programme has achieved the following:

- Launch of Seagreen Skills for the Future Lab hosted at Engineering Partnership Innovation Centre (EPIC) in November 2022.
- Installation of advanced manufacturing kit at EPIC in March 2023.
- Official launch of TCEP in June 2023.
- Hosted first event: Engineering Careers Advice Event for Skills Development Scotland in August 2023.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Mobile Engineering Technology Unit purchased, commissioned, and tested.	2024/2025
Creation of Product Innovation Lab at the Aviation Academy and Creative Exchange Perth.	2024/2025
Increased quantity & range of machine tool equipment available for use at Dundee & Angus College, Angus Training Group Perth, University of the Highlands and Islands	2023/2024

### Key Risks

Risk	Mitigation
Aviation Academy delayed.	Funding for the Product Innovation Lab can be re-allocated to TCEP main Project and delivery re-phased.
Issues on agreement of the structure of the new entity and roles within the Project.	Under review with solicitors to ensure Project progresses in collaborative manner.

## **CASE STUDY**

In January 2023, TCEP employed a Project manager and continued to develop the facilities at the Engineering Partnership Innovation Centre (EPIC) with the installation of signage and equipment including; CNC machines, micro CNC's, 3D printers and cobots. Staff have had the opportunity to trial the equipment during training sessions in preparation for delivery of courses in the coming academic year. A Launch event was held in June to celebrate this milestone and welcome local businesses, authorities and wider community to the centre to raise awareness and share the aspirations of the partnership. In August 2023 an information session was held for careers advisors from Skills Development Scotland. This event supports TCEP objective of raising awareness of career opportunities and aims to ensure the advisors are informed and able to share this knowledge with those considering their future career prospects. The event was very well received, and we look forward to continuing to develop our relationship going forward.

Work has also continued to foster a greater partnership relationship, agreeing a strategy and encouraging collaboration and information sharing. This has facilitated procurement planning progress with new equipment planned to arrive with Angus Training Group, UHI Perth, Dundee and Angus College and Perth & Kinross Council in Q4. We are now working closely with local schools and Developing Young Workforce to hold pilot events in Q3 which we hope to be able to roll out to wider audiences in Q4. The Partnership continues to grow it's network within the region and beyond with connections to AIMS at Dumfries & Galloway College, TCRD Digital Skills Project, Scottish Manufacturing Advisory Service (SMAS) and National Manufacturing Institute Scotland.



# £188.2m

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## **An Innovative, International Tay**

### **Innovative & International**

Within the Innovative and International theme there is 1 Programme - the Advanced Manufacturing Programme, 1 Fund - the Angus Fund, and 10 Projects – Growing the Tay Cities Biomedical Cluster, International Barley Hub, Advanced Plant Growth Centre, cyberQuarter, Just Tech, Perth Innovation Highway, Studio Dundee, Eden Campus, Stretch Dome Simulator and Project Beacon.

Growing the Tay Cities Biomedical Cluster, International Barley Hub, Advanced Plant Growth Centre, cyberQuarter, Eden Campus, Stretch Dome Simulator, and Mercury Drone Ports have all received Full Business Case approval. To the end of September 2023, there is one Angus Fund Project in delivery – Mercury Drone Ports and a further Project is expected to be approved in 2023-24.

£25m



## Growing the Tay Cities Biomedical Cluster

**Project Owner:** University of Dundee

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



### Project Description

The Scottish Government will commit up to £25 million to Growing the Tay Cities Biomedical Cluster. The Project will build on the region's existing life sciences reputation, including drug discovery and medical technologies. It will attract inward investment in new life sciences companies and increase industrial engagement.

The Project is creating a new three-story Innovation Hub to support the scale up and expansion of substantively invested new life sciences companies. It will provide essential laboratory and office space to anchor and support biopharma, biotech, informatics and MedTech companies in the heart of the city, immediately adjacent to the University of Dundee campus. The Innovation Hub's modular design of chemistry, biology, flexible laboratory, and office spaces enables client companies to adjust their footprint during growth. The Project will significantly drive expansion of the regional life sciences commercial cluster, attracting inward investment and quality job opportunities to the region.

The Project will also deliver a new multidisciplinary Tayside Innovation MedTech Ecosystem (TIME) to enable new medical technologies to quickly move from prototyping to commercialisation to adoption by the NHS. Refurbished MedTech facilities at the University of Dundee School of Medicine and extended Thiel cadaveric facilities at the University Centre

for Anatomy and Human Identification will enable the clinically informed development and testing of emerging medical technologies, and provide an attractive environment for industry and clinical engagement. The overarching vision is to fully maximise the region’s exceptional life sciences and health capabilities to catalyse a step change in innovation-led growth, enabling economic growth and public benefit.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- The University of Dundee was named the UK’s best for supporting spin-out businesses, according to industry-leading analysis (Gateways to Growth: The Entrepreneurial Impact Report, Octopus Ventures, Sept 2023). This continues the reputation of the Tay Cities Region as a centre for excellence biomedical translation and commercialisation.
- The capital programme works for the Innovation Hub and Medical Technologies pipeline all commenced this year and are progressing well.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
<b>Completion of construction/fit out works:</b>	
1. Thiel Cadaver Facility Extension (CAHID)	1. 2024
2. MedTech R&D Unit Refurbishment (Wilson House)	2. 2023
3. Tay Cities Innovation Hub	3. 2024
<b>Occupation of Buildings</b>	
1. Thiel Cadaver Facility Extension (CAHID)	1. 2024
2. MedTech R&D Unit Refurbishment (Wilson House)	2. 2024
3. Tay Cities Innovation Hub	3. 2024

### Key Risks

Risk	Mitigation
Escalating construction and refurbishment costs lead to enforced “cost cutting”, stalling the Project or reducing the quality of the Hub and MedTech pipeline.	Robust management and change control processes are embedded and communicated. University of Dundee has an excellent track record of managing capital Projects on time and on budget.
The effects from inflation rising at record rates, and the impact of the conflict in Ukraine on supply chain and energy prices.	Significant contingencies have been identified in each of the respective Projects to cover unforeseen costs.
Brexit Impact	Significant contingencies have been identified in each of the respective Projects to cover unforeseen costs.

## CASE STUDY

The importance of having a strong life sciences sector to translate research into new diagnostic, therapeutics and vaccines for public benefit has never been more important. At the same time, scientific R&D contributes to carbon emissions, with laboratory buildings by their nature often resource and energy intensive.

The University of Dundee is investing in innovative geothermal technology to mitigate the carbon footprint of the Innovation Hub, a new 4,863m<sup>2</sup> life sciences building. Requiring significantly less space than traditional ground source heat pump technology, innovative, directional technology is being used to form boreholes to a depth of c. 195 metres underground. This means the earth can be used as a source of low-grade heat which is turned into higher grade heat for use in the building. It can also act as a battery for the storage of low-grade heat recovered from the cooling and ventilation systems. Incorporating a sustainable source of heat and cooling in the Innovation Hub is aligned with the University of Dundee's Environmental and Sustainability policy to minimise its impact on the environment. Moreover, it ensures that the new commercial life sciences company infrastructure being creating in Dundee will be both sustainable and create economic growth.



£35m



### International Barley Hub

**Project Owner:** The James Hutton Institute

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

The UK Government will commit up to £20 million and the Scottish Government will commit up to £15 million to the creation of an International Barley Hub at the James Hutton Institute. Barley is indispensable to the Scottish and UK economies, being vital to the distilling, brewing and food industries. It also has the potential for emerging uses in the health, chemical and energy sectors. However, future barley supply is increasingly uncertain due to the impact of climate change, developing worldwide demand, evolving pest and disease risks and pressure on managing soil health to enable crops to grow.

The IBH will establish a world-leading research facility for barley science, bringing together industry, dedicated facilities and world class scientists. It will:

- Expand the scale and excellence of barley research and innovation, operating across a broad spectrum of disciplines;
- Provide state of the art research equipment on site and at industry partners premises;
- Have the capability to support work from the molecular, to the field level;
- Increase the translation and application of this research around the globe;

- Support a “Barley Cluster” of related processing, innovation and product interests; and
- Develop a supporting skills and knowledge programme.

The International Barley Hub has been developed in parallel with the proposal for the Advanced Plant Growth Centre and at the request of the Approval Authorities these have been maintained as separate business case documents, although they ultimately result in the same physical infrastructure investment. For more news and updates, please visit the International Barley Hub website [International Barley Hub](#).

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Phase 0 (Enabling Works) complete
- Phase 1 (New Access Road) 95% complete
- Phase 2 (IFF/IBH Facilities) complete
- Phase 3 (Demolitions and Infrastructure) complete
- Phase 4 (Main IBH/APGC Building) 50% complete

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Construction section 4-7	2024

### Key Risks

Risk	Mitigation
Funding constrictions due to planning application grant with condition of building separate junction.	Planning consultant appointed.
Construction inflation is higher than included in the Full Business Case.	The extent of the potential funding gap is lessening as various actions crystallise positively.
Challenge of the reduction of Hutton 23/24 Budget	Ongoing lobbying around impact of funding cut and wider financial pressures. All areas of cost under review. All areas of potential additional income generation being reviewed.

## CASE STUDY

The International Barley Hub Field Centre at the James Hutton Institute was officially opened on the 2nd of December 2022 by UK Government Minister for Scotland, Malcolm Offord. This marked a major milestone in establishing Scotland as a leader in global food security and crop resilience. Barley is the most predominant crop grown in Scotland, and supports 40,000 jobs in the UK north of the border, largely due to its key role in the world-renowned Scottish whisky industry.

Demand for the crop has grown in recent years, due to £2bn of investment in national distillery infrastructure, growth in the craft beer sector and increased whisky sales. However, research from the James Hutton Institute has found it is becoming increasingly difficult to meet this demand, due to adverse weather conditions reducing barley yields, changes in pesticide bans and crop management challenges.

The International Barley Hub (IBH) will promote scientific discovery and innovation to tackle these issues, as well as piloting new technologies for crop management, such as precision agriculture sensors and drones and will support cereal growers, brewers, distillers, and new business development. The IBH Field Centre is where barley is taken from the fields and sorted, dried, threshed and analysed and includes modern spacious laboratories, a new drying machine, threshing equipment and large amounts of storage.

The building itself has been built to incorporate many sustainable features such as reduced lighting power densities using low-energy LED lighting; sub-metering of energy consumption to enable better understanding of usage, local exhaust ventilation systems to reduce employee exposure to airborne contaminants such as dust and fumes and low fabric U-values and air filtration in excess of the Scottish Technical Standards requirements.

Investment in the IBH is also expected to generate over £105m benefit to the UK over the next 30 years, nearly £60m of which will be in Scotland. It will also generate 1,281 full-time jobs in Scotland, increasing to 1,838 FTE jobs in the UK after 10 years. Construction contracts worth £28.7m were signed between the Hutton and McLaughlin & Harvey at the opening to complete the construction of a combined Advanced Plant Growth Centre (APGC) and International Barley Hub (IBH).



£27m



### Advanced Plant Growth Centre

**Project Owner:** The James Hutton Institute

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

The UK Government will commit up to £25 million and the Scottish Government will commit up to £2 million to the creation of the Advanced Plant Growth Centre at the James Hutton Institute. It will build on existing expertise to deliver a cutting-edge plant research facility bringing together industry, advanced technology and world class scientists. The Centre embodies the idea of Agriculture 4.0, a green revolution with science and technology at its heart, with the aim of feeding future populations.

The Advanced Plant Growth Centre will be at the heart of plant and crop research and innovation in the Tay Cities region. It will develop the underpinning science and translate that science into industry, which will in turn increase the commercial, economic and environmental benefits of agriculture and the food and drink sector. The APGC will integrate:

- A plant characterisation facility, which uses imaging to quickly understand (before harvest) how crops respond and perform in different environments;
- Post-harvest storage facilities;
- Vertical growth facilities; and
- Next-generation controlled environments which can simulate any current or future environment anywhere in the world (for example, increased greenhouse gases) to test the effect on crops.

**Headline Achievements**

Since October 2022, the Project has achieved the following:

- Phase 0 (Enabling Works) complete
- Phase 1 (New Access Road) 95% complete
- Phase 2 (IFF/IBH Facilities) complete
- Phase 3 (Demolitions and Infrastructure) complete
- Phase 4 (Main IBH/APGC Building) 50% complete

**Key Milestones & Progress**

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Construction section 4-7	June 2024 – July 2024

**Key Risks**

Risk	Mitigation
Funding constrictions due to planning application grant with condition of building separate junction.	Planning consultant appointed.
Construction inflation is higher than included in the Full Business Case.	The extent of the potential funding gap is lessening as various actions crystallise positively.
Challenge of the reduction of Hutton 23/24 Budget	Ongoing lobbying around impact of funding cut and wider financial pressures. All areas of cost under review. All areas of potential additional income generation being reviewed.

## CASE STUDY

**Crop Prime** - The establishment of the Advanced Plant Growth Centre has allowed the James Hutton Institute to collaborate with leading research groups and industrial collaborators. This last year we announced our involvement in a new European research Project called 'CropPrime.' With EU Horizon funding of up to €1 million confirmed, CropPrime will develop molecular priming technologies, which will enhance crop yield under stressful conditions caused by climate change. One important aspect of the Project will be the identification of natural compounds found in plant biostimulant products (which trigger natural plant processes that enhance nutrient use efficiency), derived from marine algae. Additionally, the Project will work on developing RNA (similar to DNA) -based fungicides to reduce fungal infections in crops. The overall goal of this research is to develop sustainable agri-tech products to help crop growers protect and enhance their crops against adverse weather conditions such as drought, heat, cold, and water-logging, which are becoming more frequent due to climate change

**SusProt** - Another Project was to do with our involvement in SusProt, a consortium Project involving UPP, the harvesting technology and broccoli protein innovator plus agrifoodtech researchers and engineers and the Hutton which won a grant of £800k from the Department of Food and Rural Affairs (DEFRA) and UK Research and Innovation (UKRI). It aims to target 80% of the currently unharvested broccoli crop biomass to extract proteins and ingredients with the aim of creating low-cost, low-impact, highly nutritious protein from this previously wasted side stream which could be a more sustainable alternative to pea or soya protein.

£26.5m



### Angus Fund

**Fund Owner:** Angus Council

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Fund Description

The UK Government will commit up to £26.5million to the Angus Fund. The Angus Fund will help achieve an investment balance across the region by investing in Projects across Angus to be developed collaboratively with Angus Council and other local partners as part of the Deal. The purpose is to increase productivity through clean growth, protecting places for future generations to live, work, and visit. The Angus Fund will contribute to the development and implementation of innovative, clean technologies, which will also significantly reduce the region’s carbon footprint; contributing to national reductions in carbon use.

To deliver this purpose the Fund will support three connected components, namely:

- Clean growth;
- Low carbon; and
- Agricultural technology.

The investment has been provisionally divided between six Projects to support these themes, including:

- Centre for Agricultural Sustainable Innovation
- Mercury Drone Ports

- Connecting Montrose
- Clean Growth Business Park
- Low Carbon Housing
- Low Carbon Transport

The Angus Fund will be used to stimulate The Mercury Programme, which is Angus Council’s visionary £1 billion partnership programme between government, public, private and community sectors. Individual Project business cases will be developed for each of the Projects that comprise the Angus Fund.

### Headline Achievements

Since October 2022, the Fund has achieved the following:

- Centre for Sustainable Agricultural Innovation (CASI): CASI will now be delivered as four separate Projects following the removal of the CASI HQ due to business need requirement development. Four separate Outline Business Cases are currently being developed.
- Angus Rural Mobility Hub (ARMH): An Outline Business Case for the Project was approved in March 2023. The Full Business Case is currently being developed and an appointment has been made to RSK Engineering and Environment Consultants to develop the detailed designs of ARMH to enable planning permission to be submitted in late 2023. Additional funding of £10,000 was awarded in July 2023 by the Energy Technology Partnership to explore the development of green hydrogen.
- Zero Four Clean Growth Business Park: Angus Council is continuing to work with Crown Estate Scotland on a detailed masterplan, incorporating space for research and development, production space and offices together with an energy centre. The Outline Business Case is expected to be submitted in 2024 with a detailed planning application for Zero Four to follow.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Outline Programme Business Case for Centre for Agricultural Sustainable Innovation (CASI) approved by the Joint Committee	2023/2024
Full Business Case for Angus Rural Mobility Hub approved by Joint Committee	2023/2024
CASI Projects: Outline Programme Business Case for 4 x Centre for Agricultural Sustainable Innovation (CASI) Projects	2024/2025
CASI Projects: Full Business Case for 4 x CASI Projects approved by Joint Committee	2024/2025

### Key Risks

Risk	Mitigation
The selected Projects for funding fail to develop a robust business case	Projects will be supported by Angus Council and SE to develop robust business cases.



Risk	Mitigation
Projects are unable to achieve match funding	Working to explore external funding options and managing expectations to ensure additional sources of funding are identified and pursued where
Profiled spend not achieved within allocated financial years.	Some spend incurred at risk. Continual engagement with PMO and both governments to progress delivery.
Businesses fail to engage	Regular engagement to ensure Projects developed in a transparent and inclusive way.
Inflationary Pressures	All Projects will be at risk from Inflationary Pressures. Projects will be delivered within available Angus Fund budget and evaluated during development of business cases to ensure overall outcomes can be achieved.

## CASE STUDY

The Angus Rural Mobility Hub (ARMH), situated within a regional business park in Brechin, will provide the infrastructure, services and skills programme needed to enable the Tay Cities region’s transition to a low carbon, inclusive economy through a range of smart mobility and energy services. Following a Memorandum of Understanding being signed between Angus Council and Dalhousie Estates entering into an agreement to work together in January 2022, plans to develop the Clean Growth Business Park have moved at pace.

Consultation began in November 2022 with local community councils to help shape future proposals, informing members of the public how the new clean growth business park will integrate zero carbon energy systems with mobility services, particularly for rural service provision and create skills opportunities. Local schools were also engaged within this process, providing real-life learning opportunities to enhance their learning.

An Outline Business Case for the Project was approved in March 2023 with the Full Business Case being submitted on 15 August 2023, focusing on opportunities including an EV charging infrastructure, business space for sustainable growth, distributed energy generation and storage, clean refueling (biogas and hydrogen), and smart logistics solutions.

Additional funding of £10,000 was awarded in July 2023 by the Energy Technology Partnership to explore the development of green hydrogen. The study is being run by the University of Dundee, Angus Council and Dalhousie Estates, focusing on developing renewable hydrogen production to decarbonise heavy duty vehicles at ARMH. Progressing further, an appointment has been made to RSK Engineering and Environment Consultants to develop the detailed designs of ARMH to enable planning permission to be submitted later in 2023.



### Angus Fund – Mercury Drone Ports

**Project Owner:** Angus Council

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

Mercury Drone Ports, part of the Angus Fund, is creating Scotland’s first DronePort and drone delivery network; establishing Angus as an international centre for the development of drone technologies and logistics both onshore and offshore.

Mercury Drone Ports will support the adoption of safer, sustainable, green and more cost-effective alternatives to both commercial and public sector activities through drone operations.

Initially, the primary focus will be on the development of drone-based technologies and their application within the environments and industries found on and offshore Angus. Operations are likely to include deliveries, long-range inspection/survey missions and autonomous asset surveillance for the following industries:

- Offshore wind
- Offshore oil and gas
- Ports and Maritime
- Agriculture
- Rural public services

### Headline Achievements

The Project received Business Justification Case approval from the Joint Committee on the 24th March 2023.

To date, the Programme has achieved the following:

- Mercury Drone Ports: Successful Beyond Visual Line of Sight drone trials with NHS Tayside were undertaken between November 2022 and February 2023. Angus Council are working with Civil Aviation Authority (CAA) on developing the proposed air-space.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Drone Concession Contract Procured	2024/2025
Dedicated Airspace & Operations for BVLOS Activities	2024/2025
Dedicated BVLOS Airspace & Public Drone Experience	2024/2025

### Key Risks

Risk	Mitigation
Risk of land not being ready for development.	Seek alternative option at Broomfield Industrial Estate, Montrose.
Delay in securing approved airspace.	Work with an ASNP to develop the ACP/Safety case to deliver phase 1 of the Project.
Lack of commercial viability - demand for drones low in Angus.	Concessionaires will be required to carry out market engagement to establish use cases and commercial uses for the drone port.
Unable to secure commercial advice due to capacity within the industry for this specialist advice and budget available.	Working with Procurement Manager on procurement options available and to ensure best value for the Council.

£11.7m



### cyberQuarter

**Project Owner:** Abertay University

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

cyberQuarter is funded by both the UK and Scottish Government. The Scottish Government have committed up to £6m and the UK Government up to £5.7m.

cyberQuarter is an academic-industrial partnership designed to establish the Tay Cities region as a centre of best practise in applied research and development and knowledge exchange in cybersecurity. It will exploit Abertay University's distinctive ethical hacking and offensive cybersecurity knowledge.

cyberQuarter will deliver:

- Collaborative research and development with the cybersecurity industry to develop solutions that will improve cybersecurity amongst small and medium sized businesses
- Develop ethical hacking and offensive security activities to upskill workers and tackle local and national skills shortages
- Support businesses to raise awareness of cybersecurity risks and increase the adoption of new products and services to become more cyber resilient; and
- Deliver jobs growth in cybersecurity firms, from start-ups to large corporations, as new products and services are developed and commercialised.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Hosted 45 events at the physical hub, bringing more than 1700 visitors to this new home for the cyber security industry led innovation, in Scotland.
- Commitment from thirteen organisations to become the Founding Partners for the Abertay cyberQuarter, creating new partnerships across public, private and third sectors to respond to shared challenges and create fresh responses.
- More than 600 local primary school children have taken part in The Big Data Show, coming into the cyberQuarter alongside creative education experts to learn about becoming more cyber resilient, seeing the wide range of cyber careers on offer and gaining their first cyber related qualifications.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Benefits Realisation Plan/Reporting	2023/24

### Key Risks

Risk	Mitigation
The Capitalisation of Pump Priming Fund	Outcome of discussions positive, with the Project expecting to drawdown from 2024-2025 onwards.

£26.5m



### Eden Campus

**Project Owner:** University of St Andrews

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

The UK Government will commit up to £24.5 million and the Scottish Government will commit up to £2 million to the development of Eden Campus by the University of St Andrews. This Project aims to repurpose a 32.5-acre brownfield site into a Centre of Excellence in Low Carbon and Renewable Energy innovation. It will provide a location for innovators from academia, industry and technology to collaborate and trial new technologies and networks.

Eden Campus will bring industry alongside academic expertise from around the world and is central to the University of St Andrews' strategy to become the UK's first energy carbon neutral university. The campus will contribute to national and international ambitions for carbon reduction, while simultaneously driving employment, training, and apprenticeships in the low carbon sector.

The funding will enable the development of three interconnected components:

- An **Enterprise Hub** to support the start-up and growth of new and emerging companies focused on low carbon innovation. It will incorporate a combined incubator and accelerator facility which will offer companies space and business support services.

- The **GENESIS Centre**, a new research and development facility focused on the storage and conversion of energy. The Centre will provide a space for companies to access academic and industrial expertise, develop and test innovative new approaches to low carbon energy systems, engage with other companies, and build business-to-business collaborations.
- An **upgrade of the power supply** to the Eden Campus (and North East Fife), including a smart energy primary sub-station. This will be capable of importing and exporting power from traditional and renewable sources. It will be an active part of electricity grid management for Fife. It will help demonstrate innovative services and products, enabled by new technology and data to offer efficient, collaborative and inclusive energy solutions, capable of scaling up for national use to meet the drive for low carbon power.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- The Enterprise hub has now grown from our Entrepreneurship Centre to include the Rapid Prototype Centre (RPC), Electronics Workshop, tenanted laboratory space and a co-location space for business use and collaboration.
- The RPC has the latest 3D modelling and CAD software, electromechanical engineering tools, additive printing technology, laser cutting facilities and large scale CNC machines. This space will enable innovators to design, build and test prototypes of their inventions and is open to provide a resource to both local start ups and well as the campus community. Alongside this, is the Electronics Workshop, with printed circuit boards (PCBs), CNC mill, soldering and de-soldering equipment, reflow oven, test equipment, oscilloscopes, printed circuit assembly and in-circuit testing. From start to finish, we offer a combination of hardware and software design solutions with custom printed PCBs assembled into fully functional prototypes.
- Landlord works were completed on the Pulp Shed and the building has been handed over to our tenant, Eden Mill, for their fit out works in creating a whisky & gin distillery and visitor experience facility with open Eden Estuary views. Their detailed construction works are running to programme with the facility due to open by summer 2024.
- Eden Campus has over the last year commissioned and now operating part of the Genesis Project with our unique Scottish battery scale up facility. The official opening and naming of this facility is due on the 4th October 2023 by our Principal, Professor Dame Sally Mapstone.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Enterprise Ecosystem Project - Enterprise Hub - Deliver Design Package & gain approval to proceed from Fife Council Governance committees	December 2023
Genesis - P2X - Funding for building and infrastructure achieved	May 2024

## Key Risks

Risk	Mitigation
Lack of Funds	Mitigation is to reduce the scope further to bring the scheme within budget.
Reduced Jobs	The Project has created a number of jobs through the multi-million capital construction Programme and through further Projects and tenants the targets will be met.
Reduced Leverage	Eden Campus had brought in multi-million ££ of leverage to the campus. Also through targeting further grant funding and private investment we will meet the targets.

## CASE STUDY

The GENESIS Project set out to catalyse enhanced commercial innovation in energy storage and conversion. Our strategy was to provide SME's access to scale-up facilities for the translation of research towards early prototyping. Thus, we enable companies to prove technology before moving to scaled manufacturing. Specifically, we established a range of processing capabilities of relevance to battery, fuel cell and catalyst manufacture. This included test and development space where companies can access high-quality equipment, facilities, university know-how and expertise.

Central to the Project was the creation of a state-of-the-art Battery Scale-up Facility at Eden Campus. This comprises a dry laboratory (with specialist air handling and extraction) equipped with industrial-scale equipment for battery pouch cell production. The Project was aimed at companies operating in a range of energy-related activities, across a range of disciplines, acting as an innovation bridge to smooth the transition between different TRLs and crossing the well-known "valley of death", transiting from research to innovation.

The facilities and specialist equipment were intended be of particular interest to companies developing new products, and which needed a space to test and develop their products, with access to technical equipment beyond the reach or operational capability of many SMEs. Although united by the theme of low carbon technologies, target companies were from diverse sectors and geography. By sector, we have been particularly keen to engage with companies who are involved in the development of low-carbon processes and technologies, including:

- Manufacture and processing of energy materials, including catalysts and supports;
- Manufacture and Development of new generation batteries;
- Manufacture of technologies related to low-carbon heating.

In terms of innovation profile, the Project was aimed at SMEs which are innovation-ready, have identified possible product or process innovations, and were looking to either develop further those innovations, to test or demonstrate them, and were looking to build a platform to scale-up.



£300k



### Stretch Dome Simulator

**Project Owner:** University of St Andrews

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Innovative, International



#### Project Description

The UK Government will commit up to £300,000 to a Stretch Dome Simulator to be located within the Eden Campus. The Simulator is an integrated simulated and visualisation suite that can be used to test research and innovation into, for example, climate change, coastal ecology, underwater acoustics, low carbon and new materials. It will give scientists the ability to test theories and generate solutions in rapid time, while also giving them the capability to demonstrate the impact of their work to a wider audience.

#### Headline Achievements:

Since October 2022, the Project has achieved the following:

- Appointed Head of Software Engineering, Technical Director, and Lead for the Green Economic Ecosystem
- Developed the Nautilus Network to create a citizen science network with schools across Scotland.
- Developed the EDGAR model for a major government agency, to support sustainable decommissioning decisions in the energy sector.
- Won Interface Award to identify the niche for a novel, non-Li battery system.

- Visualised Wind Turbine Generators for collaboration with a District Network Operator.
- Invited to bid for ecological/engineering visualization and simulation of wind energy installation off Northern Europe.

**Key Milestones & Progress**

The Project was completed in 2022 and there are therefore no milestones to report for delivery.

**Key Risks**

Risk	Mitigation
Risk that data sources are not found nor open to be used within the Project.	Networking and providing presentations to all sectors to highlight benefits of being part of the concept.
The University of St Andrews is unable to fund the Full-Scale Simulator	Development of a fundraising plan to bid for the investment in medium-sized simulator as a steppingstone towards the Full-Scale Simulator.
Loss of European research partners	Participation in the UN SMART Cities alliance will open up opportunities for further research partners.
The anticipated benefits from the Stretch Dome Simulator don't materialise	Recruitment of the right mix of skilled staff and build a pipeline of Projects within academic communities and industry before the simulator is acquired to demonstrate early success.
Brexit impacts negatively on ability to continue to attract the best academics from Europe and secure the best price for materials and services in development of the Campus.	The key risks associated with Brexit were divested amongst topic specific risks on the corporate risk register in order to embed those within the new 'business as usual' reality which is now in situ. This enables the Project to anticipate, plan and mitigate against those risks to the University and Eden Campus in a more agile way.

## CASE STUDY

The D'Arcy Thompson Simulator Centre Limited is 'imagineering' Future Energy Systems (FES) with the aid of its sustainaVERSETM, initiative, to develop a fully integrated, virtual / physical space across Eden Campus at the University of St Andrews, where models can be interfaced, data imported and prototypes tested, for the rapid implementation of innovation and change in balance with NATURE.

Working with Cumulus Energy Storage, <http://www.cumulusenergystorage.com> thanks to support from the Inward Investment Catalyst Fund, the Company has conducted a Front End (FRED) Visualization of Cumulus's copper / zinc (Cu/Zn) batteries, as a safe, affordable and reliable alternative to lithium-ion (Li-ion) batteries in the context of their potential as part of a local microgrid. The University of St Andrews' Estate was used as a virtual test bed in the first instance. The energy profile for the David Russell Apartments, as a hall of residence, were promising for the unique properties of Cumulus technology, which uses proven chemistry and architectures from the metal-refining industry.

The output of the piece of innovative work underpins the case for a physical Cumulus battery to be placed at the Eden Campus, to be run in conjunction with its 1MW solar array, and subjected to the synthesized demand profile for specific building clusters.



**£49.7m**

## **An Innovative, International Tay**

### **Culture & Tourism**

Within the Culture & Tourism theme there is 1 Programme, the Regional Culture and Tourism Investment Programme, and 4 Projects; Perth Museum, Innerpefferay Library, Crieff International Highland Centre and Aero Space Kinross.

Within the Regional Culture and Tourism Investment Programme, there are currently 3 Projects which have received Full Business Case approval; Hospitalfield, Discovery Point Transformed and Pitlochry Festival Theatre. The Perth Museum and Aero Space Kinross Projects have also received Full Business Case approval.

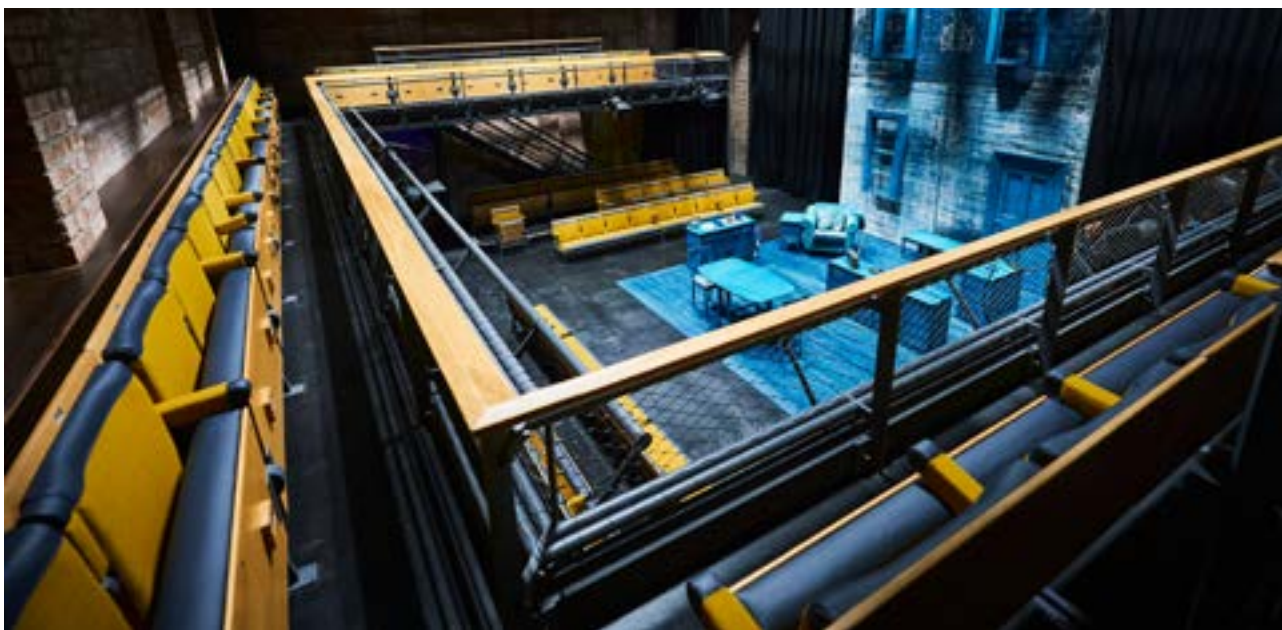


## Regional Culture & Tourism Investment Programme

**Programme Owner:** Angus & Dundee City Councils

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



### Programme Description

The Scottish Government will commit up to £37m to the creation of a Culture and Tourism programme that will invest in key economic assets in the sector. This is compiled of a £27m investment in a Regional Culture & Tourism Investment Programme and a £10m investment in a named Project; Pitlochry Festival Theatre.

The overarching objective of the Programme is to contribute to a wider Tay Cities ambition to be a highly desirable place to live, work, visit and invest in. It aims to do this by building on and strengthening the region's existing culture and tourism offering, to deliver a world class region with world class culture and visitor experiences.

The Programme will be managed and delivered collaboratively by a partnership between the four Tay Cities local authorities, Scottish Enterprise, Creative Scotland, Historic Environment Scotland, and VisitScotland, with the support of the Scottish and UK Governments.

Within the £27m Regional Culture & Tourism Investment Programme, 2 Projects have been identified for delivery. These are Hospitalfield and Discovery Point Transformed, which have received Full Business Case approval and are in delivery. There is a commitment to review the regional Culture & Tourism Investment Programme annually to allow identification and development of the next tranche of Projects.

### Headline Achievements

Since October 2022, the programme has achieved the following:

- The Pitlochry Festival Theatre Project secured Joint Committee approval in March 2023
- Tay Adventures and HMS Unicorn have continued to develop business cases in line with the Programme refresh
- The Programme Owner is working towards a refresh of the Regional Culture & Tourism Investment Programme in 2024/25.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Programme Outline Business Case Updated and Approved by the Tay Cities Partnership	2024/25
Second tranche of Project(s) Full Business Cases approved by the Tay Cities Partnership	2024/25

### Key Risks

Risk	Mitigation
The investment programme fails to prioritise Projects that help deliver a stronger and more sustainable collaborative approach between the tourism and creative sectors	The prioritisation criteria include scale, significance and transformational capacity for the assessment of individual Projects.
Individual Projects are unable to secure match funding due to changes in the funding environment.	The assessment criteria will be reviewed after the first tranche of Projects are recommended for approval through the Full Business Case. This will include match funding requirements and the current investment position.
The investments fail to deliver inclusive and sustainable growth.	The contribution that a Project makes to delivery of accessibility and fair work will be assessment criteria. Each Project's impact on the built and natural environment will also be assessed.
Construction inflation is higher than included in the Full Business Case.	Use of a recognised Construction Industry inflation index in the Business Case.
Projects no longer sustainable due to the impact of Covid-19 and inflation on the tourism sector.	All Projects are required to set out in their business cases how they are tackling the impact of Covid 19/inflation.

£5.5m



### Hospitalfield

**Project Owner:** Hospitalfield

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



#### Project Description

Hospitalfield was awarded an investment of up to £5.5m to support a visionary redevelopment plan for Hospitalfield House as part of the Regional Culture & Tourism Investment Programme. It aims to see Hospitalfield fully restored and accessible to the public. The Trust plans to restore and add to the residential, studio and visitor facilities at Hospitalfield to create a world-class cultural facility that is financially sustainable, and able to make a significant and long-term impact on the local, regional and national economies.

The five-year capital investment programme will be delivered in the following phases:

- **Phase 1:** Garden and Garden buildings – complete and open to the public.
- **Phase 2:** The repair of the historic studios and the development of the new 21st century digital studio. Development of learning and community engagement arts studios as well as the restoration of the old laundry and tack room to accommodate the horticulture programme.
- **Phase 2B:** The new guest house and restoration of the cottage which is the only accessible accommodation within the envelope of the historic building.

- **Phase 3:** Chapel – completed all design development and ready to go out to tender, closing fundraising target aiming to be on site early 2024.
- **Phase 4:** House and collections building – detailed design to RIBA stage 3 detail design underway.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Growing and diversifying public programme, welcoming people from across the Tay region and from far beyond.
- Working with local communities with a careful consideration on how Hospitalfield is capitalising on its asset for the local community as well as becoming a vital destination.
- Getting to site with phase 2 in a most challenging year for the construction industry.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Accommodation and Artist Studios	2023/24
Completion of Design Phase of the Mortuary Chapel	2023/24
Complete the detailed design and planning permission for the House & Visitor Experience and the Collections	2023/24
Funding in place for the cost of Phase 4	2024
Achieving permission to start status from the National Lottery Heritage Fund	2024

### Key Risks

Risk	Mitigation
Phase 2	The Trust is working hard to raise the revenue funding required to support the use of these new facilities.
Phase 2B: Not raising the matched funding to be able to complete phase 2A. The Guest house and restoration of the cottage – this is the critical income generation phase.	Hospitalfield was supported by Angus Council in submitting a stage 1 Regeneration Capital Grant Fund – this was turned down at first submission. The Trust will re-submit and look at other potential solutions. Discussion with Angus Council on this is also important.
Phase 3: Not raising the matched funding for the chapel.	This phase will be slowed if funds are not able to be raised in time.
Phase 4: Funding for the House and reception and collections building – this is the critical heritage and visitor attraction phase.	Discussion with all stakeholders HES, NLHF and TCRD will be required. Political support will be important locally and at SG level.



## CASE STUDY

Hospitalfield's studios are now amongst the very few purpose-built studios in Scotland from the 19th Century. As the Project to restore these studios continues, Hospitalfield proceeds to build upon the expectation for 2024/25 when they will have wonderfully restored and new facilities which will support both their artist residency and learning and engagement programmes.

In the interim, the artist residency programme, even without the studios, continues to host artists from across Scotland, the UK and with international partners, including the British Council, from across the globe. Expectations have been carefully managed throughout, making visitors aware that the studios are currently unavailable as phase two of construction is underway and what they can expect to experience in future visits.

Despite construction work being underway, throughout the year Hospitalfield have run over 70 days of free community activity through their arts and horticulture programme. This includes hosting over 280 children and young people, as well as working with partners including Angus Carers, Penumbra, Tayside Healthcare Arts, and the Angus Community Mental Health Team.

Focusing on working with local food and drink producers across Angus, Hospitalfield have been using the café and garden as a public platform to provide additional learning and wellbeing activity.

Phase two of the Future Plan capital programme started on site in November 2022, as part of a 12-month building programme. This £3.4m programme of work will restore the 19th and early 20th century studios and see a new 21st century digital studio built on the site. To date, the contractor Linnear Construction, has completed the complex process of insulating the older building, laid underfloor heating in the form of air source heat pumps, which will vastly improve the way in Hospitalfield can use these studios at a very low cost, both financially and in terms of the impact on the environment.

With the design work for the Hospitalfield Chapel now complete, once the final fundraising package is fully achieved Hospitalfield will then go out to tender to begin the next phase of the Project.

£2.5m



### Discovery Point Transformed

**Project Owner:** Dundee Heritage Trust

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



#### Project Description

The Partnership has committed up to £2.5m for Discovery Point Transformed, as part of the Regional Culture & Tourism Investment Programme. The Project will create four major attractions, delivering a major upgrade of the museum, as well as protecting and restoring the unique heritage of the RRS Discovery, enhancing overall visitor facilities and opening up new opportunities for community engagement and learning.

The five key components of the Project are:

- **Climate Change Gallery:** A new visitor attraction, highlighting the international significance of the RRS Discovery and its expeditions, and the connections to the major global issues of climate change and the ocean environment.
- **The Dundee Dome Experience:** Public access will be available for the first time to the top of the Discovery Point Dome offering 360° panoramic views of the city, waterfront and River Tay.
- **Protection of our core heritage asset, the historic RRS Discovery:** Essential conservation work will be carried out throughout the ship, with new public spaces being opened up and additional interpretation installed to complement the developments within the Discovery Point museum.

- A new gallery for temporary and special exhibitions: This will allow Discovery Point to host a greater range of temporary exhibitions, either developed in-house or touring exhibitions and the potential to host larger scale ‘blockbusters’ exhibitions.
- A new permanent gallery and the refurbishment of existing galleries.

The Project will be delivered in two distinct phases:

- Phase 1: Enabling works to create the Dundee Dome Experience and the enabling floor infills for the climate change gallery. This is now complete.
- Phase 2: Installation of the climate change gallery, the building of the waterfront events space/ café/ restaurant, further gallery/conference space developments, conservation works to RRS Discovery and the environmental works to the Discovery Point building, planned for 2025/26.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Phase 1 of Project now complete.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Phase 2 Works Start	2023/24

### Key Risks

Risk	Mitigation
Fundraising target shortfall	Project pursuing additional funding from various sources.
Construction cost inflation	<p>The board has opted to value engineer cost and re-set overall Project fundraising target to £12m. A value-engineered budget has been prepared by an experienced quantity surveyor (Turner Townsend) and includes industry standard contingencies for risks and inflation.</p> <p>For Phase 2, the Project will transfer or share procurement risks by awarding either a fixed price contract or a partnership risk sharing agreement with our main contractor.</p> <p>A degree of Brexit-related cost increases are already included in assumptions. If exceptional inflationary pressures are experienced, additional fundraising may be required.</p>



### **Pitlochry Festival Theatre**

**Project Owner:** Perth & Kinross Council

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



#### **Project Description**

The Scottish Government will commit up to £10 million to Pitlochry Festival Theatre and a transformative programme of building upgrades has now completed the first of the three phased Project. The programme builds upon PFT’s proud history to now create a centre of excellence for the 21st century, combining high quality theatre with a new approach to vocational training and skills development which responds to talent pipeline gaps within the creative sector, and an unrivalled visitor experience – all situated in an extraordinary location. No other Scottish cultural organisation is delivering such an ambitious programme.

The Theatre stands out through its high level of production output including its unique six-show summer season, through the beautiful Highland Perthshire setting and 11-acre green campus, and through an audience drawn from the local area, Scotland, the UK, and the world. The distinctive visitor experience is complemented by a commercially effective business model and a comprehensive on-site operation that substantially benefits the local economy.

#### **Headline Achievements**

The Project received Full Business Case approval from the Joint Committee on the 24th March 2023. To date, the Programme has achieved the following:

- Completed delivery of new 172-seat Studio theatre inserted within the existing building’s envelope.
- Completed delivery of upgraded, legible and accessible courtyard, entrance foyer and Box Office contributing a warm visitor welcome and strong placemaking, showcasing our enviable position on the stunning River Tummel, overlooking Ben-y-Vrackie.
- Completed delivery of upgraded accessible toilet facilities and a new accessible changing room adjacent to both the Studio and Auditorium performance spaces, allowing our organisation increased inclusivity to artists and creatives making work for our venues.
- Completed delivery of partial plant upgrade to service the first phase works, switching energy units to air source heat pumps, and disconnecting the Theatre from the gas network, to significantly reduce our carbon consumption.
- £9.1m from private funders has been secured.
- Design of Phase 1B & 2 is being finalised for Planning in September 2023, with Phase 1B due to commence work in January 2024.

**Key Milestones & Progress**

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Planning Permission for Phase 1B	2023
Commencement of construction/fit out works: Phase 1B – Building’s Thermal Envelope & Partial Plant Update	2024
Completion of construction/fit out works: Phase 1B – Building’s Thermal Envelope & Partial Plant Update	2024

**Key Risks**

Risk	Mitigation
Existing building could require external repairs, due to fabric of the existing buildings is deteriorating.	Carry out intrusive surveys and remedial repairs if required to prevent further deterioration before main works commences
Late design information causes delay and cost uplift	Agree and monitor design programme. Any late design information to be reviewed by the QS and team to identify potential changes prior to being issues to contractor.
Changes to budget and Programme give rise to additional fee claims from the Design Team	Final scope and Programme to be reviewed against Design Team fee schedules
Inflation and supply chain issues	Procurement is to be proactive and use the storage facilities available on site to secure materials

£10m

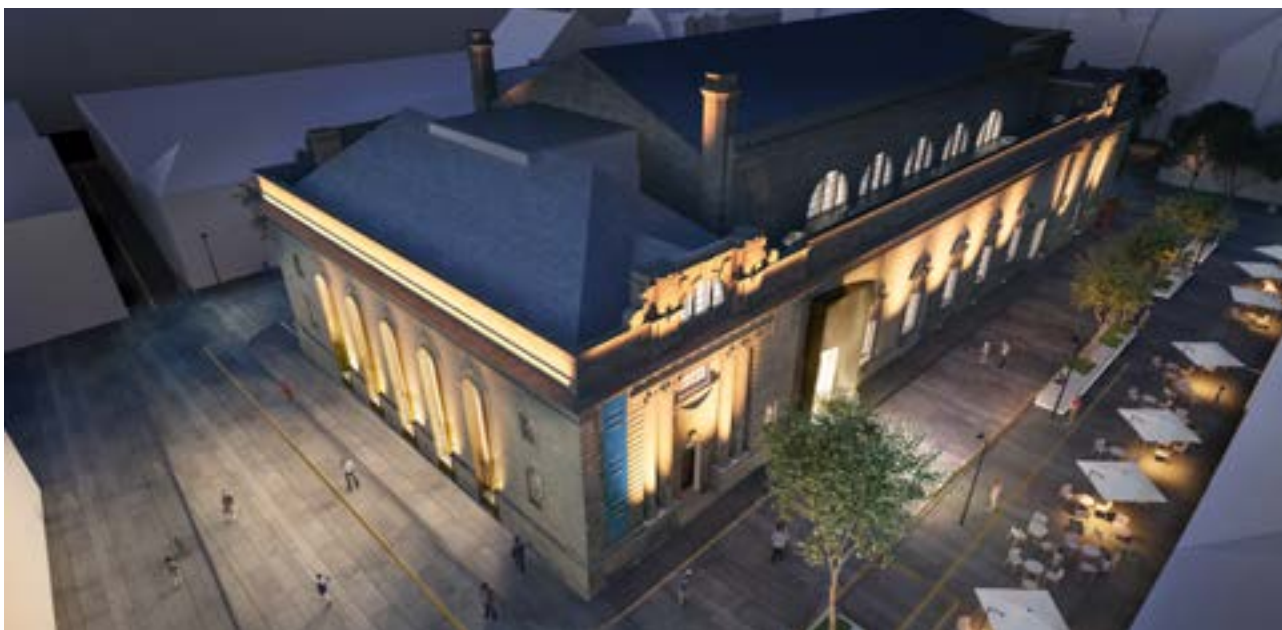


## Perth Museum

**Project Owner:** Perth & Kinross Council

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



### Project Description

The UK Government will commit up to £10m, the investment will bring Perth City Hall (now renamed as Perth Museum), a Category B listed building in the original medieval heart of the city, back to life. It will repurpose a deteriorating heritage asset, currently on the Buildings at Risk Register, into a new museum attraction of international significance.

The Museum will showcase Perth's ancient roots through museum collections which have National Recognition Status. Perth Museum will become a major cultural venue; a significant addition to the world class offer of the Tay Cities region and a source of civic and community pride, as it was when first built over a hundred years ago. It will also tell the story of the Stone of Destiny, quarried in Perthshire and used to crown every Scottish monarch at Moot Hill in Scone, just outside Perth.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Perth Art Gallery Refurbishment Complete in March 2023
- Construction Phase Complete in August 2023
- Exhibition fit-out Phase Complete in August 2023

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Specialist fit out of the Perth Museum	2023
Client moved into the Perth Museum	2023
Perth City Hall Opens for Visitors	2024

### Key Risks

Risk	Mitigation
There is a risk that business case assumptions (income/ expenditure) in the approved Full Business Case do not align with how visitor markets are recovering post-Covid.	A Commercialisation Plan is in place and CPK are developing fundraising activities. This work is currently overseen by the Senior Officers Group.
There is a risk that the different elements of exhibition fit-out in the Pavilion, which involve several specialist sub-contractors, are not aligned to ensure smooth fit-out.	A separate programme has been developed to manage this. This risk is being managed. Operational working group established, overseen by Senior Officers group

### CASE STUDY

Perth Museum is the major strand of the Perth Cultural Transformation Programme initially approved by Perth & Kinross Council in 2016. The Programme was developed based on evidence from a detailed market appraisal of Perth's performance as a tourism destination. This identified significant market opportunity and failure, with the majority of tourism visits to Highland Perthshire not Perth; a decline in local visitors to cultural attractions; and significant growth potential in the day visitor and international visitor markets in particular. Perth's tourism 'brand' was strongly associated with its heritage status to the detriment of its growing contemporary arts and creative sectors.

To address this a new interpretation story for Perth was developed, Ancient Roots/Modern Scots, to showcase Perth's place as the original capital of Scotland and centre of the early medieval Kingdom of Alba - alongside its important place in the modern Scottish Cultural Renaissance with key figures including the modernist painter John Duncan Fergusson, poet William Soutar and the city planner and environmentalist Patrick Geddes.

A key element of the new Perth Museum was the bid for the Stone of Destiny, also known as the Stone of Scone, to move from its current home at Edinburgh Castle to Perth close to its place of origin at Scone where every Scottish monarch was crowned until the 13th century when Edward I took the Stone to Westminster Abbey, where it continues to be used for Coronations, mostly recently for King Charles III in May 2023. This move was confirmed in 2020, followed in 2022 with UNESCO Creative City status being awarded to Perth, now the only UNESCO City of Craft in the UK.

£1.6m



### Aero Space Kinross

**Project Owner:** Perth & Kinross Council

**Enabling the region to...:** Innovate & Internationalise

**Thematic Board:** Culture & Tourism



#### Project Description

The investment will provide the foundation of a funding structure to construct a uniquely themed Aviation, Astronomy and Space Flight Science Centre. The Project will include:

- An interactive, educational and inspirational experience that will attract people from all over the UK and beyond to this must-see visitor destination; and
- Development and operation a fixed dome planetarium, exploring the universe through modern and interactive tools and technologies.
- Aero Space Kinross’s activities and attraction is underpinned by the desire to encourage science, technology, engineering and mathematics (STEM) led opportunities. The Project will stimulate excitement and participation in career and leisure opportunities in the multi-faceted aerospace sector and encourage future generations to enter a high value industry via existing educational and training bodies in the region.



### Headline Achievements

The Project received Full Business Case approval from the Joint Committee on the 23rd June 2023. To date, the Programme has achieved the following:

- The Project received Full Business Case approval from the Joint Committee.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Discovery Centre construction completed	2024
Fixed dome planetarium construction completed	2024

### Key Risks

Risk	Mitigation
The Project is unable to secure full funding for the investment required	Adopt a phased approach to the development of the centre as funding becomes available. Use of off-site construction.
The Project is unable to secure planning consent for the site and new buildings	There is a preferred site but also alternatives are available. Early engagement with the Planning Authority with draft plans to reach agreement on their requirements.
The Project fails to attract regional and international organisations and visitors	Develop a marketing and engagement strategy and plan. Work with other regional tourism organisations to jointly promote the Tay Cities region.
The preferred site can't be purchased	There is a preferred site but also alternatives are available. Funding for the site costs is being explored with several organisations.



**£28m**

## **A Connected Tay**

### **Transport**

Within the Transport theme, at Deal Signing there were 3 Projects named; Low Carbon Transport & Active Travel Hubs, Dundee Airport Investment and Perth Bus & Rail Interchange.

In November 2021, the Low Carbon & Active Travel Hubs Project changed to become a Programme, with 3 Projects within it – Broxden Low Carbon Transport Hub, Perth Active Travel Hub and Hydrogen Refuelling Station

The Dundee Airport Investment Project has received Business Justification Case approval.

for revenue expenditure. Low Carbon Transport & Active Travel Hubs Programme and Broxden Low Carbon Transport Hub have also received full business case approval.

£3.5m



### Low Carbon Transport & Active Travel Hubs Programme

**Programme Owner:** Perth & Kinross Council

**Enabling the region to...:** Connect

**Thematic Board:** Transport



#### Programme Description

The Scottish Government will commit up to £3.5 million to support three complementary transport developments. These innovative, low carbon technologies aim to improve the range of available sustainable travel and to improve workforce mobility, social inclusion and environmental impact.

In Phase 1, a Low Carbon Transport Hub will be built near Perth on the motorway network and will bring together solar energy generation and battery storage to provide sustainable electric vehicle (EV) charging. This will reduce barriers to EV ownership and encourage people to leave cars at the edge of the city and travel to the centre by public transport or cycling. The use of solar generation and battery storage will reduce the burden on the national grid. The Hub will include 36 Solar Car ports where a car can be charged using stored solar electricity. Charging can be fast (while you wait) or slow – designed to allow the driver to leave their car and cycle or take public transport into the city centre. Transport information mobile web application and secure storage for private bikes will support this.

In Phase 2, Active Travel facilities and services will be developed and will support the sustainable travel hierarchy and create an active travel hub and network of low carbon and shared and active travel facilities across Perth, including bike hire and secure bike storage and charging

for E-bikes. This will be supported by a transport information mobile web app, to help cyclists and pedestrians plan and manage their sustainable journeys; cycle way improvements; and the creation of a car club. With the aim of providing credible alternatives to using private cars and for non-car owners by developing and deploying active travel facilities, services and infrastructure in and around Perth. The Project will promote and support the development of a sustainable, inclusive and accessible transport system in Perth which promotes prosperity, health and fairness for all citizens. Local consultations and a programme to promote behaviour change will complement the built active travel infrastructure.

In Phase 3, Perth Hydrogen: the future development of a hydrogen fuelling station on the motorway network near Broxden in Perth.

### Headline Achievements

Since October 2022, the Programme has achieved the following:

- EV Chargers and Car Port Structure installed at Low Carbon Broxden Hub.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

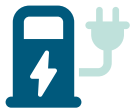
Milestone	Due Date
<b>Phase 2 : Perth – Active Travel Hubs</b>	
Development of Project tenders	2023
Publication of Project tenders	2023/24
Tender Awards	2024
Installations	2024/25

### Key Risks

Risk	Mitigation
Insufficient governance, unable to fully resource Project.	PKC has recruited an external consultancy to develop tenders for this Project, that are well defined and technically robust. Project & Cost management consultancy has been commissioned to oversee the delivery of this Project. PKC has also appointed an internal contract manager to liaise with the external Project and Cost Management to ensure effective delivery of this Project.

Risk	Mitigation
The quality of the infrastructure does not meet the Project's outcomes.	Careful review of what technology is available on the market and precise specification in the procurement documentation. All low carbon infrastructure installed will be evaluated by Tactran to ensure impartial assessment of quality and operational effectiveness.
Time - not enough time to implement the Project within the time constraints of the ERDF funding.	PKC is working hard to deliver the programme within the European Regional Development Funding time constraints and potential impacts to that delivery will be closely monitored.

£365k



## Low Carbon Transport Hub: Broxden Low Carbon Transport Hub

**Project Owner:** Perth & Kinross Council

**Enabling the region to...:** Connect

**Thematic Board:** Transport



### Project Description

The Broxden Low Carbon Transport Hub Project aims to tackle one of the largest decarbonisation problems – the transition of fossil fueled transport to zero emission transport. The aim is to help decarbonise road transport by providing expanded electric vehicle re-charging facilities at the Broxden Park & Ride site, which serves both Perth city and the Scottish motorway network and motorway interchange at the M90/A9. The Project has been awarded up to £635k as part of the wider Low Carbon Transport & Active Travel Hubs Programme.

The Project will create an innovative Low Carbon Transport Hub at a key strategic site, Broxden Park and Ride, on the western edge of Perth city. At this site, a range of refueling charging speed options for Electric Vehicles (EVs) will be provided to accommodate the different usage patterns of EV users, including the first Disabled access EV charger in the area.

With the existing EV chargers at the site and the proposed expansion of EV charging stations in this Project, there would be 41 EV charging spaces available at Broxden. This development of low carbon infrastructure would help confirm Broxden as a significant EV charging hub on this central node of the Scottish motorway network, close to the motorway interchange between the M90 and A9.

The increasing demand for EV charging puts an increasing demand on the electricity supply network (grid) of the region/country. To meet Scottish Government’s announcement of phasing out the need for new petrol and diesel cars and vans in the UK to 2030, it will be necessary to dramatically increase the up-take of low emission vehicles (Battery Electric Vehicles and Fuel Cell Electric Vehicles) over the next few years. The cost of the electric grid re-enforcement work required to support a largely electric transportation system is in the hundreds of millions for Scotland alone. To help tackle this issue and align with Tactran’s Regional EV Strategy aim of supporting EV charging from a resilient and decarbonised energy network, we plan to develop an innovative solution. A combination of on-site renewable energy generation from solar carport canopies and a battery storage unit will be deployed to sustainably support the EV charging systems at the site.

### Headline Achievements

Since October 2022, the Programme has achieved the following:

- EV Chargers and Car Port Structure Installed in January 2023
- Battery system installed and Smart Energy Management configured to enable the existing site energy capacity to be supported by the one-site Solar (Car Port Canopy) and battery system
- Final adjustments and completion of EV Chargers, Car Port Solar Canopy, Battery System & Smart Energy Management System. SSE completed the installation of the new sub-station.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
Civil Works Site Closure and signage	2023
Low Carbon Installations Operational	2023

### Key Risks

Risk	Mitigation
EST may not agree to extend ERDF funding timeline.	Discussion held with EST about the potential to extend ERDF funding timeline. Also discussed the potential to alter the TCRD drawdown profile for the Project.
Sub-station upgrade may take SSE longer to implement than expected	Extensive discussions with SSE over the last year. SSE have confirmed they intend to deploy the new sub-station at Broxden in summer of 2023.
Sub-station upgrade at Broxden Park & Ride has triggered grid re-enforcement works and will require a new GRP unit.	An alternative design has been developed to enable the new equipment to be energised and usable within the current site energy capacities. Continuing discussions with SSE.
Change in delivery timeline	Alternative design and delivery schedule completed.

  
**£8.9m** Capital  
**£600k** Revenue

### Dundee Airport Investment

**Programme Owner:** Dundee City Council

**Enabling the region to...:** Connect

**Thematic Board:** Transport



#### Programme Description

The Scottish Government will commit up to £9.5 million to the development of Dundee Airport, which is licensed for scheduled, private and charter operators. This investment will support the development of new route opportunities, enhancing links with other UK airports and potentially European hubs. These links will ensure the Airport can contribute effectively to the region’s wider connectivity requirements, a key enabler of sustainable economic growth.

The Deal will also support further capital investment in the Airport, potentially including air traffic management infrastructure as well as modifications to the terminal building and airfield.

To date, the revenue element of the Project has been approved to secure the Public Service Obligation which will deliver a new route from Dundee Airport to London City.

#### Headline Achievements

Since October 2022, the Project has achieved the following:

- From 7th May 2023, the service moved from London City airport to London Heathrow, and it is expected that this will drive further passenger growth.



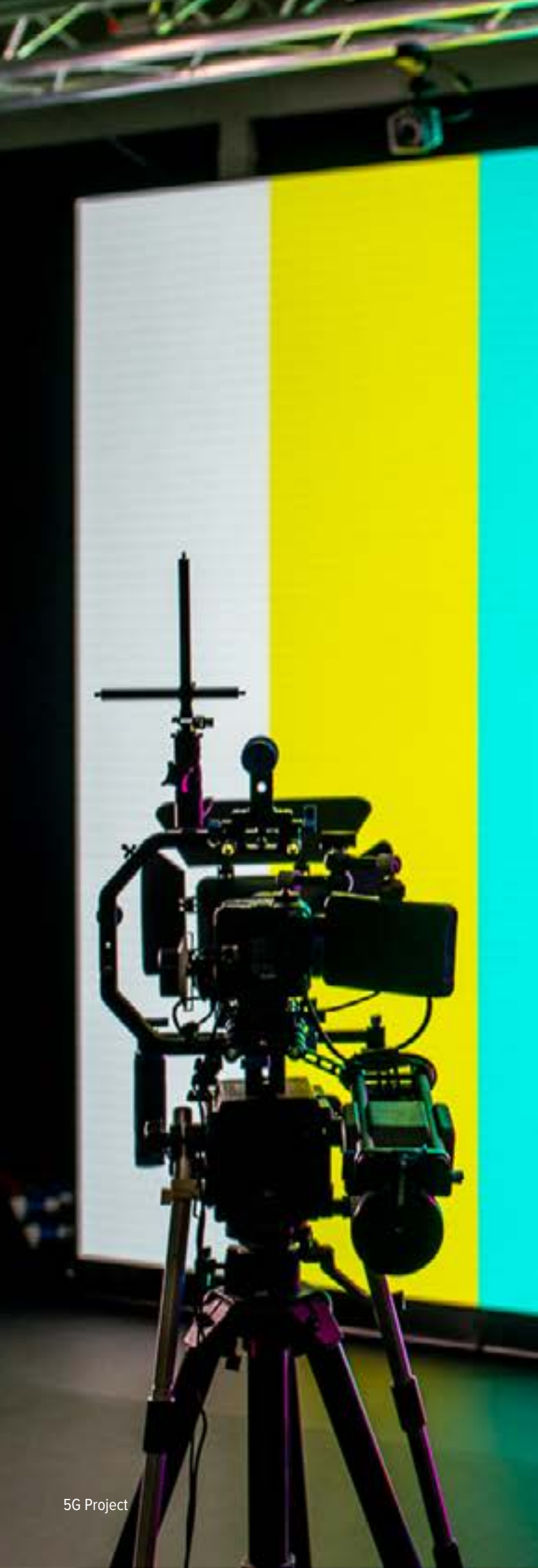
### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023 and relate to the Project as a whole, capturing both revenue and capital activity.

Milestone	Due Date
Programme (phase 1 & 2) Outline Business Case approval	First iteration target submission 2023/24, with further iterations following Government feedback
Programme (phase 1 & 2) Full Business Case approval	TBC As part of Programme OBC submission
Airport Infrastructure upgrades completed	TBC As part of Programme OBC submission

### Key Risks

Risk	Mitigation
Revenue requirement for PSO subsidy from DCC and Transport Scotland unaffordable for some or all of the 4 year PSO arrangement	Explore options with TCRD to alternate existing capital funding to revenue to allow this to be used as revenue support for the PSO subsidy
Timeline for development of OBC/FBC pushed beyond currently profiled drawdown	Submit change request to TCRD PMO to push back drawdown profile for 2024/25 (£2.9M) and 2025/26 (£3.1M) to later in the Deal



**£4m**

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## **A Connected Tay**

### **Digital**

Within the Digital theme there are 2 Projects; Rural Angus and Rural Perth & Kinross Highspeed Broadband and 5G Digital Testbeds.

Both Projects have now received Business Case approval.



## Rural Angus and Rural Perth & Kinross High Speed Broadband

**Project Owner:** Angus Council and Perth & Kinross Council

**Enabling the region to...:** Connect

**Thematic Board:** Digital



### Project Description

The UK Government will commit up to £2 million to developing Rural Angus and Rural Perth & Kinross High Speed Broadband. These Projects will enhance digital connectivity in rural areas across the region, and will be enhanced by match funding from the UK Government Local Full Fibre Network programme.

Up to £1 million is committed to the Rural Angus Project, which will focus on creating a solution to provide remote and rural properties with full fibre and high-quality wireless connectivity.

Up to £1 million is committed to the Rural Perth & Kinross Project, which will – in Perth - re-use and extend existing fibre broadband between Perth city centre and a new residential development to the west of Perth. Remaining funding will connect over one hundred rural sites, including rural schools, libraries and museums to gigabit capable connectivity.

### Key Milestones & Progress

The Project was completed in September 2022 and there are therefore no milestones to report for delivery.

£2m  
5G

### 5G Digital Testbeds

**Project Owner:** Dundee City Council

**Enabling the region to...:** Connect

**Thematic Board:** Digital



#### Project Description

The Scottish Government will commit up to £2 million to support 5G testbeds and trials in the Tay Cities region, helping to put it at the forefront of full fibre and 5G deployment to drive economic development.

The testbeds are the infrastructure (data centre, fibre and transmitters) needed for 5G. Case studies will explore the use of the testbeds for applications as varied as transport information mobile gaming or measuring civic space usage.

The funding will be used to work with local communities, academic institutions and businesses to develop and demonstrate 5G test cases. This work will develop the practical use of 5G and demonstrate the innovation possible, its potential markets and the appeal of these innovations to regional communities and stakeholders.

The test cases will be focussed initially on Dundee waterfront but also explore how to use the digital connectivity improvements in rural Angus and Perth & Kinross to roll out 5G case studies there.

Since the business case was approved, the Project has submitted a change request for alternative use case trials to be explored that respond to the execution of smart ports/smart sites and agritech/smart mobility. Pathfinder use case trials were originally selected to address key strategic

sectors relevant to the Tay Cities Region and developed based on opportunities when the business case was drafted. The Project have sought to update the use case trials so that they align with the same areas and deliver the same agreed outputs. This change request was agreed by the Partnership and Governments in August 2022.

### Headline Achievements

Since October 2022, the Project has achieved the following:

- Successful delivery of a UK first test of virtual production over 5G between Dundee and Manchester.
- Development and delivery of a Challenge Fund as an opportunity for UK wide engagement with Tay 5G and the Scotland 5G Centre.
- Award of funds to four Challenge Fund use case trails, all now underway.

### Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below. The milestones are reflected in the Tay Cities Region Deal Implementation Plan annual review completed in June 2023.

Milestone	Due Date
5G Project Trials completed	2024/25

### Key Risks

Risk	Mitigation
Use of Year 1 budget: Any spend/commitment ahead of BJC approval was on 'at risk' basis & DCC procedures mandate delivery of UCT following Project SG approval & contract. If the funds remain at Year 10, the Project will be unable to deliver on the complete programme of planned UTCs.	A request would be required through the PMO to bring budget back from Year 10 to the Project period that currently concludes at the end of 24/25. Post mitigation is if granted.
SME led UCTs: Adequate financial status and resources to deliver UCTs/conduct R&D	Due diligence conducted by DCC Finance and payment of grant in arrears.
Perth Museums 5G UCT: Completion of framework and budget information required in order to comply with approval process according to timeframe to allow delivery in 2023/24.	Support by DCC and facilitation of support and advice by Scotland 5G Centre.

## CASE STUDY

Tay5G has supported a breakthrough for media production with virtual production using 5G technology. In a groundbreaking test sequence, two actors located in Dundee and Manchester were able to work together in real-time using a 5G internet connection. This innovative technique utilises high-definition LED screens, CGI, and motion capture to create virtual sets that actors and crew can see and interact with. The Project, led by Abertay University demonstrates the potential for wireless virtual production filmmaking and the flexibility offered by 5G. With further deployment of 5G across the country, this technology opens up new possibilities for working with large-scale digitally generated environments and mobile studios.

The Project involves collaboration with various industry partners and universities, including Manchester production company, Space Digital, UK creative clusters InGAME and StoryFutures, Royal Holloway University of London, and the Scotland 5G Centre. The use of 5G technology allows for a rapid internet connection and seamless communication between the studios in Dundee and Manchester, enabling real-time interaction and synchronization of actors against a consistent virtual environment.

Leveraging 5G's high bandwidth and low latency capabilities, this virtual production breakthrough showcases the transformative power of technology in the film industry, providing opportunities for innovative storytelling, cost savings, and reduced environmental impact. It sets a precedent for the future adoption of 5G technology in the creative sector and emphasises the importance of collaboration between industry and academia in driving technological advancements. Support by Tay5G has been followed by further support by the UK Government with Abertay being selected as preferred bidder in Scotland, for one of only four hubs in the UK.

# Benefits

## Benefits Realisation Plan

Key to the Tay Cities Region Deal is ongoing monitoring and evaluation, which will be progressed as part of the Benefits Realisation Plan (BRP). The Tay Cities Benefits Realisation Plan has been informed by the work of the PMO Networking Group’s benefits realisation sub-group.

In March 2022, the first Benefits Realisation Plan for the Tay Cities Region Deal was approved by Governments and the Joint Committee, and updated in March 2023.

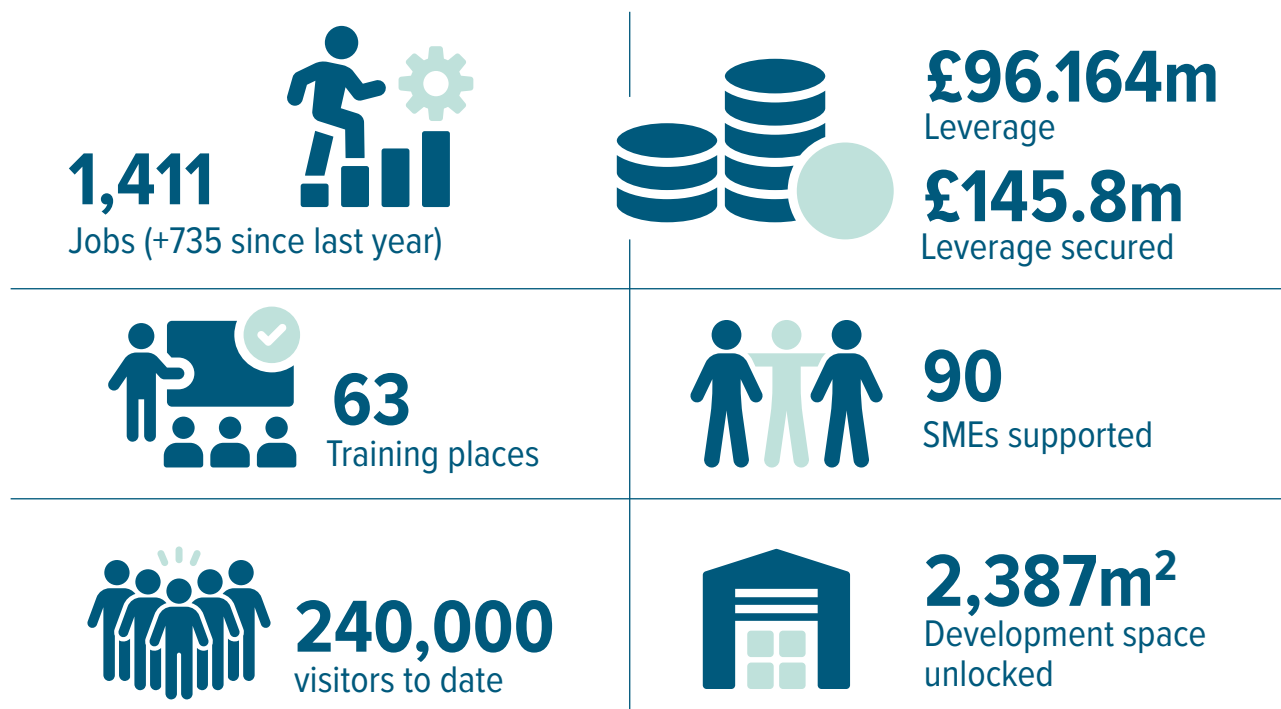
The purpose of the BRP is to demonstrate, to our local, regional and national stakeholders, how we will capture the outputs, outcomes, and impacts resulting from Tay Cities Region Deal investments. It is the Partnership’s approach to monitoring and evaluation. Going forward, the Partnership will identify, collate and explain the collective benefits of the Deal as a whole.

The Plan has been updated, as part of an annual commitment and will be published in March 2024 on the Tay Cities website alongside this Annual Report.

As the main commitments for the Deal, the value of leverage secured and committed as well as the number of jobs secured to date are outlined in this report.

## Other Outputs

There are a number of other ‘core’ outputs within the Deal, as agreed at Deal Signing. These include training places, visitors, development space unlocked, and SMEs supported. The achievements to date are:



Since Deal signing in December 2020, a significant amount of leverage has been secured to the end of this reporting period.





# Leverage Statement

The Investment by the Scottish Government and the UK Government of up to £150 million each in the Tay Cities Region Deal, has the potential to lever in £400 million of investment over 15 years. At the time of Deal signing, the named Programmes, Fund and Projects made a commitment to secure this investment. The Deal definition of leverage is the provision of financial and other incentives to mobilise partner and stakeholder resources. This includes equipment and people as well as funding.

Since Deal signing in December 2020, a significant amount of leverage has been secured to the end of this reporting period. Table 4 summarises the leverage position up to the end of Q2 2023.

The full leverage figures for the Programmes and the Fund is not totalled as the individual Projects within the Programmes and Fund are shown separately.

Table 4: Tay Cities Region Deal Leverage Summary

TCRD Thematic Board	Programme/Fund/Project	Leverage Commitment at Deal Signing £000	Leverage secured to end of Q2 2023 £000	Leverage received to end of Q2 2023 £000
<b>An Empowered &amp; Inclusive Tay</b>				
<b>Skills</b>	Regional Skills & Employability Development Programme 18	0	-	-
	Regional Skills & Employability Development Programme – Programme Manager	0	0	0
	Regional Skills & Employability Development Programme – Digital Skills	0	0	0
	Regional Skills & Employability Development Programme – Life Sciences - Biotechnology and Medical Technology	0	0	0
	Regional Skills & Employability Development Programme – Upskilling of SMEs	0	0	0
	Regional Skills & Employability Development Programme – Hospitality	0	0	0
	Tay Cities Engineering Partnership	500	323	323
	Aviation Academy for Scotland	0	0	0
<b>An Innovative, International Tay</b>				
<b>Innovative, International</b>	Growing the Tay Cities Biomedical Cluster	119,099	18,600	7,520
	International Barley Hub	0	9,022	2,302
	Advanced Plant Growth Centre	0	6,155	2,094

TCRD Thematic Board	Programme/Fund/Project	Leverage Commitment at Deal Signing £000	Leverage secured to end of Q2 2023 £000	Leverage received to end of Q2 2023 £000
<b>Innovative, International</b>	Angus Fund	23,900	-	-
	Angus Fund – CASI Programme	12,000	0	0
	Angus Fund – Mercury Drone Ports	0	0	0
	Angus Fund – Angus Rural Mobility Hub	3,000	0	0
	cyberQuarter	5,024	10,049	10,049
	Just Tech	0	0	0
	Perth Innovation Highway	17,242	0	0
	Studio Dundee	21,000	0	0
	Advanced Manufacturing Programme	8,000	0	0
	Eden Campus	110,394	56,400	38,973
	Stretch Dome Simulator	0	305	305
	Project Beacon	12,425	0	0
<b>Culture &amp; Tourism</b>	Regional Culture & Tourism Investment Programme	19,000	-	-
	Regional Culture & Tourism Investment Programme – Hospitalfield	5,500	3,606	2,039
	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	2,500	3,303	1,148
	Pitlochry Festival Theatre	10,000	11,300	9,100
	Perth Museum	15,217	16,821	14,181
	Innerpeffray Library	0	0	0
	Crieff International Highland Centre	660	0	0
	Aero Space Kinross	1,285	0	0
<b>A Connected Tay</b>				
<b>Digital</b>	Rural Angus and Rural Perth & Kinross Highspeed Broadband	5,980	3,980	3,980
	5G Digital Testbeds	0	1,206	580
<b>Transport</b>	Low Carbon Transport & Active Travel Hubs Programme	6,050	-	-
	Low Carbon Transport & Active Travel Hubs – Phase 1 Broxden Low Carbon Travel Hub	424	1,028	230
	Low Carbon Transport & Active Travel Hubs – Phase 2 Perth Active Travel Hub	400	400	0
	Low Carbon Transport & Active Travel Hubs – Phase 3 Hydrogen Refuelling Station	400	400	0

TCRD Thematic Board	Programme/Fund/Project	Leverage Commitment at Deal Signing £000	Leverage secured to end of Q2 2023 £000	Leverage received to end of Q2 2023 £000
Transport	Dundee Airport Investment	0	0	0
	Perth Bus & Rail Interchange	400	3,340	3,340
<b>ALL</b>	<b>TOTAL</b>	<b>398,000</b>	<b>145,838</b>	<b>96,164</b>

### Key Headlines

- Since the Deal Signing, £145.838m of leverage has been secured by Projects to the end of September 2023. This equates to 36% of the overall leverage anticipated at Deal Signing. This is an increase of £22m since last year.
- To the end of September 2023, Projects within the Deal have received £96.164m of the secured leverage, equating to 24% of the leverage commitment at Deal Signing. This is an increase of £15m since last year.

# Jobs Statement

The Investment by the Scottish Government and the UK Government of up to £150 million each in the Tay Cities Region Deal, has the potential to secure over 6,000 jobs. At the time of Deal signing, the named Fund, Programmes and Projects made a commitment to secure these jobs. The Deal definition of jobs is any new permanent paid jobs created as a result of the Project. This can include construction or safeguarded jobs, as well as apprenticeships.

Table 5 below, summarises the number of reported jobs created up to the end of Q2 2023 since Deal Signing.

The full jobs figures for the Programmes and the Fund is not totalled as the individual Projects within the Programmes and Fund are shown separately.

Table 5: Tay Cities Region Deal Jobs Summary

TCRD Thematic Board	Programme/Fund/Project	Jobs commitment at Deal signing or in Approved Business Case	Jobs created to the end of Q2 2023
<b>An Empowered &amp; Inclusive Tay</b>			
<b>Skills</b>	Regional Skills & Employability Development Programme 18	49	-
	Regional Skills & Employability Development Programme – Programme Manager	1	1
	Regional Skills & Employability Development Programme – Digital Skills	0	2
	Regional Skills & Employability Development Programme – Life Sciences - Biotechnology and Medical Technology	0	0
	Regional Skills & Employability Development Programme – Upskilling of SMEs	0	0
	Regional Skills & Employability Development Programme – Hospitality	0	0
	Tay Cities Engineering Partnership	5	5
	Aviation Academy for Scotland	93	0
<b>An Innovative, International Tay</b>			
<b>Innovative, International</b>	Growing the Tay Cities Biomedical Cluster	450	4
	International Barley Hub	1838	65
	Advanced Plant Growth Centre	795	65

TCRD Thematic Board	Programme/Fund/Project	Jobs commitment at Deal signing or in Approved Business Case	Jobs created to the end of Q2 2023
<b>Innovative, International</b>	Angus Fund	40	-
	Mercury Drone Ports	60	0
	cyberQuarter	500	123
	Just Tech	251	0
	Perth Innovation Highway	720	0
	Studio Dundee	250	0
	Advanced Manufacturing Programme	0	0
	Eden Campus	659	799
	Stretch Dome Simulator	3	7
	Project Beacon	60	0
<b>Culture &amp; Tourism</b>	Regional Culture & Tourism Investment Programme 19	229	-
	Regional Culture & Tourism Investment Programme - Hospitalfield	13	174
	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	78	92
	Pitlochry Festival Theatre	230	0
	Perth Museum	40	26
	Innerpeffray Library	0	0
	Crieff International Highland Centre	4	0
Aero Space Kinross	50	0	
<b>A Connected Tay</b>			
<b>Digital</b>	Rural Angus and Rural Perth & Kinross Highspeed Broadband	0	0
	5G Digital Testbeds	0	43
<b>Transport</b>	Low Carbon Transport & Active Travel Hubs – Phase 1 Broxden Low Carbon Travel Hub	16	2.5
	Low Carbon Transport & Active Travel Hubs – Phase 2 Perth Active Travel Hub	21	0
	Low Carbon Transport & Active Travel Hubs – Phase 3 Hydrogen Refuelling Station	27	0
	Dundee Airport Investment	320	3
	Perth Bus & Rail Interchange	75	0
<b>ALL</b>	<b>TOTAL</b>	<b>6,877</b>	<b>1,412</b>

### Key Headlines

- Since the Deal Signing, 1,411 jobs have been created by Projects to the end of September 2023. This includes the creation of temporary positions for the Hospitalfield, Discovery Point Transformed and 5G Digital Testbeds Projects. This is an increase of 735 jobs created within the region.
- This equates to 24% of the 6,000 jobs anticipated at Deal Signing.

# Year Ahead

## Upcoming Milestones

Over the coming year, the Tay Cities Region Deal is committed to various activities relating to the Deal and regional collaboration work. The milestones and key dates are set out below.

Table 6: Milestones

Milestones	Target Date
Regional Economic Strategy Action Plan update	December 2023
Submission of draft Annual Performance Report following approval by Tay Cities Partnership	December 2023
New Joint Committee Chair & Vice Chair appointed	December 2023
PR & Comms Protocol annual refresh	December 2023
Official Launch of SME Skills Fund	January 2024
Clean Growth Action Plan update	February 2024
Formal Opening of Crop Storage System at James Hutton Institute	February 2024
Benefits Realisation Plan annual update published	March 2024
Opening of Perth Museum	March 2024
Implementation Plan annual review	June 2024
Regional Economic Strategy Action Plan refresh	June 2024
Opening of Advanced Plant Growth Centre	Autumn 2024
Partnership to commence mid-term review of The Deal	Autumn 2024

## Business Cases & Project Delivery

As the Deal approaches the final quarters of the 2022/23 financial year and its fourth year of delivery since the Deal was signed, a number of Projects will be coming forward to progress their business cases for approval to deliver. Table 7 below outlines the business cases expected to seek Government and Partnership approval between Q3 2022 and Q3 2023.

Descriptions of each Project can be found in the Deal Document.

Table 7: Business Case Timeline

Project	Anticipated Business Case Approval Date	Status
Regional Skills & Employability Development Programme – Programme OBC Refresh	2024/25	Business case in development
Regional Skills & Employability Development Programme – Life Sciences Project (Year 2 Project)	2023/24	Business case in development

Project	Anticipated Business Case Approval Date	Status
Regional Skills & Employability Development Programme – Upskilling SME Skills Project (Year 2 Project)	2023/24	Business case in development
Regional Skills & Employability Development Programme – Hospitality Project (Year 2 Project)	2024/25	Business case in development
Regional Skills & Employability Development Programme – Phase 2 Projects (Year 2 Project)	2024/25	Business case in development
Angus Fund – CASI Programme (Year 2 Project)	2024/25	Business case in development
Angus Fund – Rural Mobility Hub Project (Year 2 Project)	2023/24	Business case in development
Angus Fund – Zero Four Project (Year 5 Project)	2023/24	Business case in development
Regional Culture & Tourism Investment Programme – Programme OBC refresh	2024/25	Business case in development
Regional Culture & Tourism Investment Programme – Phase 2 Projects	2024/25	Business case in development
Advanced Manufacturing Programme	2024/25	Business case in development
Dundee Airport Investment	2024/25	Business case in development
Perth Innovation Highway (Year 2 Project)	2024/25	Business case in development. Expecting a 2 year delay
Aviation Academy for Scotland (Year 2 Project)	2024/25	To be developed. Expecting a 3 year delay

### Regional Collaboration

In the next year, the following Regional Collaboration opportunities are likely to emerge;

- During the reporting period 2 facilitated workshop sessions on regional collaboration have emerged, with the first of these being held at the end of October 2022 and the second in August 2023. The purpose of these sessions was to refine and commit to the areas where there is greatest value in collaborating, and record the successes.
- Leading on from the workshops, outputs will be developed to refine the Regional Economic Strategy Action Plan, as well as prioritisation of actions to better report on delivery.

### Key Challenges

There are a number of key challenges facing the Deal in the coming months. These include:

- Inflation continues to be a significant challenge for both Projects and the Partnership in managing the Deal Programme. The Partnership will continue to work together to understand the impact on the Deal and support Projects to deliver.
- There is a challenge for the Partnership in securing timely Business Case approval. As we enter year 5 of the Deal, the Partnership will continue to support Programmes and Projects to secure Business Case approval in advance of the first year of drawdown.



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## Further Information

- Tay Cities Region Deal Website: [www.taycities.co.uk](http://www.taycities.co.uk)
- Tay Cities Publications, including the Deal Document and regional strategies/plans: [www.taycities.co.uk/publications](http://www.taycities.co.uk/publications)
- Tay Cities Joint Committee Papers: [www.taycities.co.uk/joint-committee](http://www.taycities.co.uk/joint-committee)



Smarter + Fairer



Tay Cities Region Deal

# BENEFITS REALISATION PLAN

INCLUSIVE GROWTH STATEMENTS

REPORT 3 | September 2023



Funded by  
UK Government



Scottish Government  
Riaghaltas na h-Alba

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# Inclusive Growth Statements

The following sets out the inclusive growth Statement, by the Deal themes, for each of the Tay Cities Region Deal Programmes, Fund and Projects.

## Skills Theme

### Regional Skills & Employability Development Programme

Fair work and inclusive, sustainable growth is at the heart of the Regional Skills and Employability Development Programme. Skills investment is central to the creation of quality and equitable employment opportunities by increasing personal capital and earning capacity, and many employees will see training and development opportunities to enter and progress in the workplace as part of a Fair Work package.

The Programme will bring about the changes in skills and employability services that will make a positive, tangible difference to citizens, businesses and other stakeholders.

The investment will drive up skill levels and productivity across the region through developing employment, training, and skills development opportunities. The Programme has four overarching objectives:

- Increasing the understanding and awareness of job and learning opportunities for our residents;
- Putting in place the support required to help our more disadvantaged citizens succeed;
- Opening new and diverse talent pools to businesses and demonstrating the value of inclusive employment practices; and
- Enhancing the ability of partners to work collaboratively to build a more inclusive, innovative, and future-proofed job market.

The direct impact of this investment will be an incremental reduction in unemployment and economic inactivity among Programme beneficiaries across the region, employers reporting fewer skills shortages and gaps, and citizens able to access the training and employability support they need to succeed within the workplace.

This includes continued improvement in the quality of outcomes for the most disadvantaged people in our region, greater diversity of talent within our workforce, and the reinvigoration of communities across the region.

Successful delivery of the Programme and achieving the targets set will help create the conditions for making incremental contributions to the following wider benefits:

- A more inclusive and diverse workforce;
- Reduced income inequality, equating to a fairer and more equal region;
- A healthier population, given the established links between employment and positive physical and mental health;
- A happier and healthier workforce, bringing improvements in terms of efficiency and productivity; and

- Financial savings through reduced spending on Universal Credit and unemployment-related benefits

### Programme Targets

Targets	Phase 1 Projects Total	Overall Programme Total
Total number of beneficiaries	3,100	5,000
Quality and sustainable new job opportunities as a direct result of this Programme	28	50
Beneficiaries supported into sustainable (greater than 13 weeks), secure and quality employment	900	1,350
Businesses directly supported through this Programme	800	1,200
Number of businesses receiving support to 1) improve their understanding of the recruitment needs and challenges they face, and 2) increase their ability to access suitably skilled staff (as measured in the Employer Skills Survey)	600	900
Uplift in skills and employability - additional accredited training and skills improvements	450	675
Development of a pan-regional skills development and employability approach, built on enhanced cooperation, collaboration, and partnership working.	N/A – this will be measured through qualitative impacts (surveys, case studies, evaluation, etc.)	

#### **In increasing workforce representation, the Programme will look to target specific underrepresented groups and those furthest from the labour market:**

Females - 50% of all beneficiaries	1,550	2,500
BME - 4% of all beneficiaries	100	200
Disabled - 10% of beneficiaries	300	500
Sustained increases in recruitment of and employability and skills development opportunities for people from deprived areas (i.e. intervention will target those furthest from the labour market across the region.	500	750

These figures have been arrived at based on the totals of individual projects which will be taken forward under Phase 1.

N.B. Figures for BME and Disabled beneficiaries are a broad representation of the share of the total regional population with these characteristics. These have been arrived at through use of Annual Population survey data on NOMIS, and in conjunction with key regional partner insight.

The number of beneficiaries likely to come from deprived areas is based on SIMD data and has been arrived at in discussion with partners.

It is expected that, given the regional demographics and relative levels of deprivation, there is likely to be a relative geographic concentration of beneficiaries within certain areas of the region.

The following Phase 1 Projects are encompassed by the Regional Skills & Employability Development Programme. Phase 2 Projects are still to be confirmed.

- Skills Programme Manager Post
- Digital Skills

- Life Sciences – Biotechnology and Medical Technology
- Supporting SME Skills
- Hospitality Skills

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## **Skills Programme Manager Post (part of the Regional Skills & Employability Development Programme)**

The Skills Programme Manager post will drive the strategic skills and employability agenda across the Tay Cities Region and enable employability and related skills services to work better collectively to realise a more co-ordinated approach to delivery and a more efficient, effective offer to service beneficiaries.

As the Programme Manager will have a key role in linking projects and activities across all Tay Cities Region Deal themes and groups, the post will be able to ensure that the overarching inclusive growth targets of the Regional Skills & Employability Development Programme are realised. The Programme Manager will develop a Tay Cities Region programme to maximise skills development and collaboration between the four Local Authorities, third sector, employers and HE/FE institutions, enhancing the already strong relationships that exist. This will create a value for money and unified approach to skills delivery and will ensure that skills interventions are shared with employers and residents in the Tay Cities region. The Programme Manager will maintain regular and meaningful dialogue with skills providers, presenting opportunities created by the City Region Deal, actively promoting them and identifying potential areas of collaborative working and sharing of resources.

The Skills Manager will direct activities at a granular level, attending Local Employability Partnerships and engaging key players to promote the benefits of a cohesive and collaborative delivery model that will benefit employers and residents.

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## **Digital Skills (part of the Regional Skills & Employability Development Programme)**

The Digital Skills project will support the regional labour market through skilling, re-skilling and upskilling in digital skills. There are three Business Needs and Service Requirements that must be met by the project: plugging the digital skills gap, understanding/satisfying business needs and creating unrivalled talent across the region.

Phase 1 of the project will pave the way for satisfying longer-term goals of: developing seamless pathways in the education sector (including schools); plugging the digital skills gap so current vacancies can be filled; and supporting the non-tech sector to embrace tech. The Phase 1 work must quickly and flexibly help individuals and businesses recover from the pandemic so regional delivery of national initiatives to increase participation and take up will be an early priority. Phase 2 activities will be addressed as the business case is developed.

The project will work to ensure inclusive growth by focusing activity on under-served groups such as women returners, people with disabilities (including neurodiversity), those from the most deprived areas, and those in rural areas. Inclusive growth outcomes include narrowing the attainment gap; increasing rates of labour market participation among women; and narrowing the disability

employment gap. The project is committed to widening the labour pool with digital skills across the region and addressing the underrepresentation of women, people for BME backgrounds and people with disabilities in the technology sector. Given the RSED Programme level focus on inclusivity and ensuring equality of access to opportunities for everyone across the region, improving equality will be a feature of this project too.

Quantitative targets for inclusive growth measures include:

- By the end of Year 3 (31 March 2025), over 180 individuals should be supported directly or indirectly through the activities
- 60 delivery partners (30% of the total for the whole project) involved from all sectors (business, public sector, education etc.).
- 50% of the beneficiaries will be female, 4% BME and 10% disabled in line with the targets for the Regional Skills and Employability Development Programme.

In terms of sustainable growth, it is expected that the project is likely to become operationally net zero (with no capital spend on equipment or construction), and therefore whole life carbon net zero.

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## **Life Sciences – Biotechnology and Medical Technology (part of the Regional Skills & Employability Development Programme)**

The Life Sciences project seeks to establish a partnership between the three regional colleges – D&AC, Perth College UHI and Fife College – to develop new and enhance existing course provision across a range of SCQF levels, to create new learning and career pathways for prospective learners and meet the skills needs of the growing biotech, biomedical and agritech sectors. The Project will capitalise on emerging economic opportunities in the three sectors where there is a need for more than 400 new and replacement lab staff in the near future, in a range of positions from introductory scientific support, lab technician and lab management roles.

The Project will also address the problems and difficulties faced by the existing skills provision mechanisms, the biotech, biomedical and agritech sectors, and the Tay Cities Region economy in general, namely the:

- lack of skills and lack of up-to-date provision of education and training to support the growth of the biotech, biomedical and agritech sectors; and
- lack of inclusion within the sectors (e.g. women, those with disabilities, those from deprived areas); and
- the growing productivity gap with Scotland.

The Project recognises the long standing and multifaceted challenges and barriers that the labour market faces in terms of inequality, high levels of unemployment, and deprivation. The project has outlined specific objectives around skills, including aligning skills development with these key employment and growth sectors, and in applying the principles of Fair Work in all skills and training provision:

- improving workforce skills, re-skilling and upskilling workers, tackling barriers to employment for disadvantaged groups, enhancing working life choices, supporting employer investment in workforce development and streamlining the skills system.

The Project has identified the following targets:

- 110 new enrolments on relevant courses
- 70 Female enrolments
- 27 Enrolments with disability
- 40 Enrolments from most deprived 20%
- 8 Ethnic Minority enrolments
- 56 Work Placements

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## **Supporting SME Skills (part of the Regional Skills & Employability Development Programme)**

The SME Skills project aims to bring the skills training potential from the colleges and universities together with business support agencies to improve the training and development offer to SME's in the TCRD area.

The Project will help address in-work poverty by supporting/working with businesses that are aligned to the Scottish Government's Fair Work First principles. For example, all businesses that seek support will be encouraged to sign up to the Scottish Business Pledge or Making Living Wage Places.

By supporting employee retention and reducing "labour market churn" by investing in employees through training and skills development – the project will help to retain and motivate employees by signalling that the employer regards the employee as worth investing in. This is particularly important for those from 'harder to reach groups (for example, women returners, BAME, young people) and those that have come through the employability pipeline - as they are more susceptible to "falling out" of the labour market and back into unemployment.

This approach is one that is inclusive and that promotes sustainability, prosperity and resilience, where businesses can thrive and innovate – contributing to the wellbeing economy.

Specifically, the Project aims to generate the following inclusive growth benefits:

- Number of SMEs supported - 310
- Number of individuals benefiting from training - 619
- Number of females benefitting from training - 308
- Number of people from BAME background benefitting from training - 17
- Number of people aged 16-24 benefitting from training - 68
- Number of disabled people benefitting from training - 62
- Number of people living in SIMD communities in top 20% most deprived benefitting from training - 115
- Increased GVA (gross) - £6.8
- Increased salaries (gross) - £3.5
- Number of jobs created - 2
- Number of jobs protected - 129



## **Hospitality Skills (part of the Regional Skills & Employability Development Programme)**

The Hospitality Skills project is aimed at addressing the skills issues faced by employers across the Hospitality and Cultural Tourism sectors. This will bring the skills training potential from the colleges and universities together with industry partners to support in the attraction of a new and diverse workforce to the industry along with improving talent retention by enhancing the skills of those already employed within the industry across the Tay Cities Region.

Complementing the Scottish Government's 'No One Left Behind' approach, this skills provision will work alongside the broader employability support provision within Tay Cities to provide the industry focussed skills required to support participants into fair work, sustainable jobs offered within the Hospitality and Tourism sector.

Targeting a greater diversity of workforce will create inclusivity and promote sustainability of skills, progression opportunities and employment that will increase the retention of workforce towards these industries. Sustainability will also be a key focus within the delivery approaches of the skills development provision with a combination of in person and hybrid learning together with process improvements which will lead towards a more efficient approach and create sustainability through a reduction in participant travel.

### **Project Outputs**

- Support additional 200 people into employment across the region (proportion of the overall 6,000 achieved by the overall Skills project).
- Reduce the percentage of employees in the Tay Cities Region which are paid less than Real Living Wage, working to align with the Scottish average. Hospitality sector to achieve 90%.
- Number of businesses supported - 200
- Number of individuals trained - 2,000

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## **Aviation Academy for Scotland**

The Aviation Academy for Scotland (AAS) project will work in support of the Tay Cities Skills and Employability Development Programme to deliver Fair Work. 'AAS training and education programs will reduce the aviation industry skills shortage and gaps. Incremental system-wide improvements will be delivered to ensure Inclusive Growth, boosting the flow of individuals from disadvantaged groups.

The AAS will:

- Build a larger supply of more appropriately skilled new entrants to the workforce and broadening the diversity of those choosing the aviation industry as a sustainable career path.
- Reduce economic inactivity and tackle obstacles to employment for disadvantaged groups by providing opportunities for those furthest from the employment market.
- Enhance entrepreneurial skills for business start-ups and small business growth and resilience.
- Be part of the development of a skills system that is characterised by greater agility, inclusivity and resilience.

All partners actively encourage a diverse target audience into the industry including actively encouraging young people and those with protected characteristics to engage in the STEM subjects, increasing the likelihood of becoming future employees within the aviation industry.

In terms of sustainable growth, the environmental impact of the capital developments within the project are being fully considered. Partners are exploring options for key project infrastructure investments including new-build, refurbishments and equipment to reflect sustainable sources of energy. Other measures include opportunities to implement continuous process improvements in the construction works, with the aim of reducing pollution and the amount of construction, demolition and excavation waste going to landfill. Balancing in person and hybrid delivery models will encourage an improved carbon footprint across the project.

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## Tay Cities Engineering Partnership

The Tay Cities Engineering Partnership (TCEP) will forge new levels of collaboration between industry and education to develop existing expertise, accelerate the pace of research and development (R&D), and crucially, to deliver benefit to businesses and the economy. TCEP brings together the expertise of key private and public engineering facilities across Tayside in a new collaboration that will drive up the skills and technology base of the sector to become more competitive in an international marketplace and to meet the skills demands of new emerging green technologies.

There were 740 businesses generating around £850 million to the Tayside economy in 2018 (around 14% of Tayside's output in that year). Over the last couple of years, the economic and business environment has changed significantly, placing more importance on innovation and skills.

Quantitative targets for inclusive growth measures - TCEP support inclusive growth by delivering its objectives to:

1. Create a state-of-the-art centre for training, demonstration and product prototyping
  - Delivery of 600m<sup>2</sup> Engineering and Advanced Manufacturing Centre of Excellence in Arbroath
  - Delivery of 2 Product Innovation Lab in Perth 2.
2. Increase productivity in the engineering and manufacturing sector
  - Increase turnover of companies engaging with TCEP by 3% within five years of their engagement
  - Signpost 4 companies to the PIL by year 5
3. Increase the uptake of companies using digital technologies and advanced manufacturing techniques for design, prototyping and POC
  - 20 companies undertaking projects through TCEP by year 5
  - 50 companies accessing the demonstrator space at the Centre of Excellence by year
  - Mobile Engineering Technology Unit accessed by 20 businesses
4. Increased awareness of career and employment opportunities in the engineering and manufacturing sector
  - The proportion of females accessing engineering related courses will increase by 15%
  - Mobile Engineering Technology Unit to visit 100% of schools located in the top 20% most deprived areas in the Tay Cities Region by year 5

## Innovative, International Theme

### Growing the Tay Cities Biomedical Cluster

The Biomedical Cluster project seeks to catalyse a step change in the innovation led growth of the biomedical sector in the Tay Cities region. The project seeks to unlock community benefits during the capital infrastructure programme and throughout the long-term operational delivery of the project, including local supplier development and local employment opportunities, particularly targeting those from disadvantaged groups and new entrants to the job market. The project will support new apprenticeships, meaningful work placements, and skills training. Equality and diversity policies underpin the project values from the outset, including the design and procurement of infrastructure through to career mentoring and engagement with local communities. A long-term ambition is to encourage and raise the diversity of entrepreneurs in the regional life science sector. In terms of sustainable growth, the environmental impact of the capital development has been fully considered. Investment is being made in a sustainable source of energy for key project infrastructure. Other measures include improvement of waste management systems, with the aim of reducing pollution and the amount of construction, demolition and excavation waste going to landfill.

Quantitative targets for inclusive growth measures during the construction phase include:

- 75% of spend retained within 40 miles of Tay Cities Region; 40% within 20 miles; 20% within 10 miles.
- 6 new apprenticeships completed within the contract period
- 5 new employees targeted from disadvantaged groups within the contract period
- 60 weeks of meaningful work placement and 350 weeks of on-site skills training
- 4 engagement events and support activities.

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### International Barley Hub

The International Barley Hub (IBH) will be a world-class, state of the art, contemporary plant science innovation hub and translational research centre of excellence. The IBH will promote Scientific Discovery, Innovation and Internationalisation, supporting cereal growers, brewers, distillers, the knowledge economy and innovative new business in Tayside enhancing the production and alternative uses of premium quality barley.

The Project is committed to promoting equality and inclusion in all our activities, whether this is related to the work that the James Hutton Institute does with external stakeholders or whether this is related to their responsibilities as an employer. The Project also seeks to have due regard to the need to eliminate discrimination, advance equality of opportunity, and foster good relations when making decisions and developing policies.

To ensure that the built infrastructure complies with all accessibility requirements it is a key criteria being followed by the appointed design team. The Project follows the principles of the WELL Building Standard, although without gaining formal certification of the scheme. The WELL Building

Standard focuses design of buildings that should be developed with people's health and wellness at the centre of design. The standard takes a holistic approach to health in the built environment addressing behaviour, operations and design.

During the construction phase, the lead contractor has made the following Social, Economic and Environmental commitments as they deliver their element of the project:

- Ensure Fair Payment: We pay 100% of tier 1 suppliers within 19 days of certification.
- Engage with local contractors: We hold local "Meet the Buyer" events providing access to opportunity for local contractors.
- Provide opportunities for local people: 75% of on-site labour will be sourced from within 40 miles of the project.
- Support SMEs: 85% of the project spend will be with SMEs.
- Support local, smaller companies: 10% of the engagement and spend will be with Micro Businesses (as defined in EU law – less than 10 employees and less or equal to £1m turnover) from the local area.
- Encourage diversity: A minimum of one Social Enterprise from the area will be employed.
- Upskill, engage and support youth employment: A range of opportunities to improve Employment and Skill in the area.
- Deliver for the Environment: We will put in place a biodiversity action plan and offset our site gas, electricity and gasoil operations.

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## Advanced Plant Growth Centre

The Advanced Plant Growth Centre (APGC) is an innovation centre that will place Tayside at the heart of the emerging disruptive global technologies of total controlled environment agriculture and help to create new technology industries and enhance existing agri/horticulture systems across the full supply and value chains. The APGC will ensure that Tayside, Scotland and the UK become globally recognised for research on protected and total environmental control crop production and crop storage.

The James Hutton Institute are committed to promoting equality and inclusion in all our activities, whether this is related to the work we do with our external stakeholders or whether this is related to our responsibilities as an employer. We are also required to have due regard to the need to eliminate discrimination, advance equality of opportunity, and foster good relations when making decisions and developing policies. To do this, it is necessary for us to understand the potential impacts of our internal and external activities on different groups of people. This is ensured through an Equality, Diversity and Inclusion Committee. The Committee meet on a regular basis to monitor all equality, diversity and inclusion matters.

Also lead by the James Hutton Institute, the APGC is following the same inclusive growth approaches as the International Barley Hub project. Whilst the Advanced Plant Growth Centre is a separate Project to the International Barley Hub, the two are integrated as part of James Hutton Institute activities and the same policies and procedures are in place.

## Angus Fund

The Angus Fund will be used to stimulate Angus Council's Mercury Programme, the purpose of which is to "increase productivity through clean growth, protecting places for future generations to live, work and visit".

By providing support for investment and growth in innovative key sectors of the local economy, such as offshore wind, low carbon technologies, agriculture and food and drink, the Angus Fund will support additional higher value skilled jobs alongside reskilling and training opportunities particularly targeting those from disadvantaged groups and new entrants to the job market.

Industries being targeted for investment will be reviewed to identify inherent equality issues, for example gender unbalanced workforces, and appropriate targets/activity will be designed to address such issues.

Angus Council will maximise the opportunities to support local communities through procurement, taking into consideration the principles of Community Wealth Building, and will incorporate/link skills and employability aspects to projects, e.g. specifically targeting those from disadvantaged groups.

Quantitative targets for inclusive growth measures will be identified as each project within the Fund develops to OBC and FBC stage. However, by way of example, targets being considered include:

- A target for local spend
- A commitment to promote fair work practices, including paying the real Living Wage, in employment opportunities arising from projects
- Creation of apprenticeships through capital builds
- Creation of higher value skilled job opportunities and access to skills development

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## cyberQuarter

Abertay University is a leader in Scotland in enabling access to university for students from disadvantaged backgrounds. This is front and centre of the University's strategic plan for 2020-25, and has heavily informed our TCD project. The cyberQuarter will contribute to inclusive growth by supporting the development of digital skills, and through business start-up and scale up in both cybersecurity and companies in other sectors.

Cyber security roles are high wage jobs. There is currently a skills shortage and demand for people with these high level digital skills is increasing. The physical cyberQuarter facility will act as a 'beacon' for the cyber security industry in the region, increasing aspiration among the local population and showcasing clear routes to local opportunities. The cloud computing infrastructure developed by Abertay University to support the cyberQuarter project provides scalable capacity for offensive cyber security online learning. This virtual 'hack lab' enables learning and development, a secure environment for applied development and testing of new digital products/services.

However, the cyber sector workforce is not currently diverse, and regional challenges in school attainment and progression disproportionately impact on career pathways into computing science and cyber security. The project will work with schools and third sector organisations to support awareness of digital skills and cyber careers, and support upskilling and reskilling initiatives to offer a range of pathways to high level digital skills linked to cyber security and ethical hacking.

The cyberQuarter will kickstart research, innovation and knowledge exchange activities in digital technology sector, and in other sectors experiencing digital transformation. By proactively targeting the uptake of knowledge exchange and academic-industrial collaboration at non-cyber sectors, we can support growth in sectors which are more likely to be diverse than the cyber or wider digital sectors. The Abertay cyberQuarter Business Development Plan has clear actions and deliverables in relation to engagement with non-cyber companies around knowledge exchange and innovation.

The cyberQuarter project has refurbished an existing building rather than a new build. Renovation projects usually save between 50–75% of embodied carbon emissions compared to constructing a new building. We have further sought to minimise emissions by reusing and recycling materials and equipment already within the building and are actively considering the installation of photovoltaic tiles on the roof of the Bernard King Library which will support cyberQuarter operational energy requirements. We have maximised the use of local supply chains wherever possible – for example, office furniture and local labour force in construction.

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## Just Tech

The project seeks to catalyse a new innovation led economic cluster for the Tay Cities region which develops and leverages the demonstrable local strengths and convening power at the interface between science, law and deployable technologies for operational use within the justice system.

The project will deliver community benefits specifically during the capital infrastructure programme and throughout operational delivery for the facility, including, but not limited to, local supplier and supply chain development and local employment opportunities. Those from disadvantaged groups across the region will be targeted, opening up new opportunities for entrants to the job market in an emergent growth area. The project will support new work placements in the law and justice space, new collaborations and engagement opportunities for local industries and develop skills training across local and regional communities.

Equality and diversity policies will underpin the project values from the outset, including all stages of the design and procurement of infrastructure, engagement with local communities bringing them into the heart of the project in all design phases and, once operational, the development and delivery of end to end career mentoring to facilitate the realisation of personal and professional developmental goals across all sectors of the community. A long-term ambition is to raise the degree and diversity of active public and community engagement across this new and exciting regional economic cluster as well as ensuring that diversity across the entrepreneurial and innovation community in this emergent growth area, are emphasised and realised.

Quantitative targets for inclusive growth measures during the construction phase seek to include 75% of spend retained within 40 miles of Tay Cities Region; 40% within 20 miles; 20% within 10 miles.

In addition, Just Tech will:

- Support new apprenticeships completed within the construction phase and contract period
- Target employees from disadvantaged groups within the construction phase contract period
- Support meaningful work placement and on-site skills training the construction phase
- Deliver engagement events and support activities for local communities from across the region will be ongoing

## Perth Innovation Highway

For the Perth Innovation Highway project, the procurement of infrastructure works will be subject to the procurement regulations of Perth & Kinross Council. These regulations are in turn subject to the Equality Act 2010 and the Authorities' socioeconomic duty to adopt transparent and effective measures to address inequalities in the local economy. This will ensure that the short-construction employment enabled by the project will afford equal opportunity for women, disabled people, ethnic minorities, and people from the region's most deprived communities.

In the ongoing development and operation of the wider site, the project will contribute towards the inclusive growth of Perth and the wider Tay City region through:

- **Demand:** creating the conditions that enable job creation and better opportunities for employment. Specifically, the project will unlock 11 hectares of employment land designed to support innovative logistics and mobility organisations that are anticipated to offer a range of skilled employment opportunities; and
- **Supply:** bringing together a triple helix model of innovation including academic partners such as the University of Edinburgh, that can better connect people to job opportunities by improving their basic skill levels that will enable them to access those employment opportunities.
- **Engagement:** in line with the TCD Skills Investment Plan, the project team will engage with the Developing Young Workforce (DYW) Perth and Kinross to understand how they might engage students or young adults with 'personal challenges, or who may be at risk of a negative destination'<sup>1</sup>. In addition, PKC, through its Employability and Fair Work programmes will ensure that every effort is made to ensure the investment can benefit women, disabled people, ethnic minorities, and people from the areas most deprived communities. Initially this will be through the construction phase of the project, using procurement levers established by PKC to ensure that companies engage with the DYW and the Councils Employability and Fair Works programmes. During the 'operational' phase of the site, PKC will be responsible for developing an occupier profile which has an inclusive growth arrangement that occupiers will be requested to adhere to. Post monitoring and evaluation through the projects Benefits Realisation Strategy will monitor occupier employment profiles to assess the impact of the request.

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## Studio Dundee

The detail as to how the Studio Dundee project will contribute to inclusive growth is still being considered as part of the business case development. However, as a Dundee City Council projects, this initiative will look to maximise community wealth building opportunities during the capital infrastructure programme and throughout the long-term operational phase of the project. This will include local supplier and employment opportunities, particularly targeting social inclusion for those from identified groups and new entrants to the job market. The Project will support new apprenticeships, work placements, and skills training where appropriate. There will be a key focus on the skills and employability in the digital sector for the project.

**Advanced Manufacturing Programme** This programme seeks to support a range of impactful projects via an open call-based approach to assist in drawing out industry and academia in their

<sup>1</sup> TCD Skills Investment Plan. Available at: <https://www.taycities.co.uk/sites/default/files/final-skills-investment-plan-tay-cities-region.pdf>

views of the issues/challenges facing the advanced manufacturing sector and potential solutions. This includes low levels of R&D investment and a need for greater collaboration in relation to the Industry 4.0 agenda around use of data, automation, artificial intelligence and robotics.

Each application for funding will be expected to contribute to the inclusive growth agenda and set out how it will address issues, such as poor female representation in manufacturing, skills shortages, low levels of productivity, lack of higher paid skilled jobs, etc.

Each application for funding will be expected to address how the project will unlock community benefits through the capital investment, including local employment opportunities or local supplier development. The application will need to assess the environmental impact of suggested capital investments as well as how the project outcomes will contribute to Net Zero ambitions.

Quantitative targets for inclusive growth measures are not available at this time, but will be included in each application for funding and are expected to include:

- New employees, new apprenticeships, from disadvantaged groups
- Skills training
- Engagement with wider supply chain

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## Eden Campus

The Innovation Hubs at Eden Campus, the University of St Andrews, intend to develop strong connections with regional and international businesses to produce a step-change in the commercialisation of their research and development. In the longer-term this innovation collaboration will help deliver better quality jobs in Tay Cities. Eden Campus has already started to work with Women's Enterprise Scotland and the Women's Business Station in Dundee as part of their activities to tackle the gender gap in new business start-ups and business leadership. The University is promoting women's entrepreneurship to donors to build a network of practical supporters.

For example, WES have had initially discussions regarding locating at Eden Campus, which is pending the outcome and development of Enterprise Hub. The WBS is also pending the completion of the Enterprise Hub at Eden Campus. Furthermore, an Entrepreneurship Centre opened at Eden Campus Sept 2021: 2 cohorts have completed FastStart immersive training courses. Two further courses entitled 'Steps to Start Up' have also been completed. In addition, a speaker series drawing upon the experiences and expertise of established entrepreneurs has been established. Across these initiatives the take up from women was:

- FastStart – 46 women
- Steps to StartUp – 7 women
- Speaker Series – 2 women

The University will also look to ensure that the opportunities created will provide a wide range of community benefits through work placements, apprenticeships, supply chain development and local job opportunities. The University has developed the Guardbridge Guarantee that is driving this approach.

At Eden Campus, the University, its tenants and partners will also look to ensure that all partners work towards the Fair Work principles and pay the Real Living Wage. The University will also



encourage and support adoption of the Scottish Government's Business Pledge in its lettings policies.

Furthermore, the Project will work with local bus operators to increase the frequency of bus services servicing Eden Campus. This is intended to make it easier for individuals and Protected Groups to access work and enterprise opportunities at Eden Campus.

Together with the contractors for the development of Eden Campus and shared with Scottish Enterprise, a number of quantitative targets have been established from the onset of the project. For example:

- Local Spend (proportion of spend with our supply chain within the local area – target is 75% within 40 miles)
- Local Labour (proportion of labour working on the project within the local area – target is 75% within 40 miles)
- SME Spend (proportion of spend with small to medium enterprises – target is 85%)
- SME Engagement (proportion of supply chain engaged that are SME's – target is 85%)
- Micro Business Spend (proportion of spend with MB's – target is 10%)
- SME Engagement (proportion of supply chain engaged that are MB's – target is 10%)

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## Stretch Dome Simulator

The Stretch Dome Simulator is an integral part of Eden Campus; the inclusive growth priorities for the Campus are embraced by constituent projects such as the simulator. The Project will contribute to the following:

- **Developing a Global Cluster of Excellence** – The Innovation Hubs delivered by Tay Cities Region Deal investment in the Further and Higher Education Sector, including Eden Campus, intend to develop strong connections with regional and international businesses to produce a step-change in the commercialisation of their research and development. In the longer-term this innovation collaboration will help deliver better quality jobs in Tay Cities. A recent example, is the development of a cluster of 15 European companies operating in the district heating networks supply chain. These companies are interested in exploring how the simulator can create district heat models to benefit rural communities across Europe.
- **Closing the Gender Gap** – Eden Campus has already started to work with Women's Enterprise Scotland and the Women's Business Station, Dundee as part of their activities to tackle the gender gap in new business start-ups and business leadership. The University is promoting women's entrepreneurship to donors to build a network of practical supporters.
- **Community Benefits from Procurement** – The planned capital investment in Eden Campus will provide a significant boost to the Scottish construction sector. The University will look to ensure that the opportunities created will provide a wide range of community benefits through work placements, apprenticeships, supply chain development and local job opportunities. The University has developed the Guardbridge Guarantee that is driving this approach.
- **Fair Work** – At Eden Campus, the University, its tenants and partners will also look to ensure that all partners work towards the Fair Work principles and pay the Real Living Wage. The University will also encourage and support adoption of the Scottish Government's Business Pledge in its lettings policies.

- **Connectivity and Access** – The University is working with local bus operators who have increased the frequency of bus services servicing Eden Campus. These bus services run between St Andrews, Cupar, Leuchars and Dundee. This is intended to make it easier for individuals and Protected Groups to access work and enterprise opportunities at Eden Campus.

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## Project Beacon

Project Beacon will provide a whole system innovation in the capture, improved management and valorisation of post-consumer plastics in Tay Cities region. The concept is designed for regional deployment and is globally, highly transferable.

The project will create good quality local employment opportunities in a development of technological diversity and innovation. Particularly emphasis will be given to the creation of opportunities for disadvantaged groups and new entrants to the job market. Project Beacon will also support the early-stage development of a Clean Tec Training and education Facility at the Binn Eco Park. The company will also contribute directly to the Community Benefit fund at the Binn Eco Park. This focus on community benefit is a core component of the industrial ecology of the Binn Eco Park and is fully supported by Project Beacon.

The project programme will seek to utilise local supply chains throughout the immediate capital development and long-term operational delivery of the project. Part of the aim of the facility is to foster UK and international links on research and new technology testing to encourage entrepreneurial solutions to the global plastic waste crisis. As a direct clean technology intervention one of the project's main aims is to reduce the environmental impacts of plastic waste including the reduction of carbon emissions from its post-consumer management. The facility operates on renewable energy private grid.

Quantitative targets for inclusive growth measures during the construction phase include:

- A minimum £25,000 per annum contribution to the community fund.
- 2 new apprenticeships completed within the project development contract period
- 4 new apprenticeships created in the first 2 years of operation.
- 2 full time equivalent employees from disadvantaged and 2 from disabled groups within the first two years of operation.
- Creation of work placement opportunities (as yet at an undetermined level)
- Organise up to 8 engagement events and support activities in the first 4 years of operation.
- Support local plastic manufacturing opportunities.

## Culture & Tourism Theme

### Regional Culture & Tourism Investment Programme

With up to £37m investment from the Scottish Government, the Regional Culture and Tourism Investment Programme will build on and strengthen the existing culture and tourism offer within the region making it a year-round attractive destination of choice. As part of the Programme, Projects will contribute to inclusive growth by supporting local people and attracting new workers into the sector, particularly those from disadvantaged groups, as well as supporting the upskilling and re-skilling of existing workers. This will also mean that projects will contribute towards the commitment to move towards support of the Fair Work Agenda and link with regional skills and employability opportunities.

The Programme, and its Projects, will support the region to continue to build creative industries capacity and reinforce culture-led regeneration. This will in turn enable the region to link cultural engagement with quality of life and increased local ambition that could be used to inform future development and investment decisions regionally and across Scotland.

As part of the prioritisation and selection process for the Projects, Projects are expected to demonstrate inclusive growth including for example a commitment to community, increasing participation through volunteering, demonstrating community-led business models and ownership and a clear statement towards addressing social inclusion. The details of inclusive growth commitments will be set out within Project business cases as they are developed, and as they move in to the delivery phases.

The following Projects are encompassed by the Regional Culture & Tourism Investment Programme:

- Hospitalfield
- Discovery Point Transformed
- Comic Centre
- Tay Adventures
- HMS Unicorn

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### Hospitalfield (part of the Regional Culture & Tourism Investment Programme)

Hospitalfield is a unique and valuable cultural asset in Angus – the Project’s vision is to ensure that it is developed to ensure public benefits by:

- Making Hospitalfield’s building and gardens part of a high-quality experience for visitors
- Creating a destination in Angus and for the region for food and drink with easy access for visitors
- Developing a cultural place that supports people at all stages of life, encouraging them to participate in arts, heritage, horticultural and food programmes. These will be aimed at young people and the older isolated generation to improve wellbeing.

Hospitalfield has an engagement programme with a dedicated staff member who works on the engagement and volunteer programme, including the following. There is the potential within the collections and gardens to expand the existing programme of work as the asset invests in the physical facilities over the coming years.

1. Volunteers:

- a) volunteer garden club which includes a wide range of people from different age groups. This opportunity serves a number of purposes, from exercise to sense of purpose to mental health support.
- b) volunteer collections group that meets once a week, who focus on care of the collections at Hospitalfield. The purpose of the group is for people to meet and work together, especially older people, and opportunities for continual learning.

2. Arts Programme:

- a) working with local primary and secondary schools, including the annual graduation procession and in relation to Hospitalfield's artist residency programme.
- b) work experience opportunities for both secondary school leavers and for graduates
- c) running a number of artist commissions that are long term engagement programmes.

Hospitalfield is also the lead partner in the Angus Place Partnership which is a funded scheme with Creative Scotland. From this the Project are working on a wide range of programmes across the region and have formed many partnerships with agencies such as Historic Environment Scotland, the National Trust, Angus Council and Angus Alive.

With regards to wellbeing, the Hospitalfield Trust work with a number of agencies including:

- Angus Carers – with long term carers and young carers we are just starting to work with them on their focus on the elderly.
- Gowanlea – including succeeding in providing paid roles for some of Gowanlea's clients.
- Walking – funded through Paths for All which initiated an elderly walking group which has evolved to become our Meander Group.
- Tayside Healthcare Arts – developing programmes for those who are long term sick to work in the gardens and with artists on a range of horticultural programmes.

In addition, the Project will create at least 13 new jobs of which some will require specific skillsets. This will potentially bring new people to work in the region. The Project will work with local colleges to support the training of students. Through learning and engagement programming, the enhancements to Hospitalfield will also contribute to the experience of living and working in Angus forming partnerships with schools and colleges so ensuring that we work with all primary and secondary schools in Arbroath and with other schools and colleges across the region.

Hospitalfield have a strong relationship with the higher education sector, largely through partnership working with educational institutions for work experience. There is also an established relationship with the University of Glasgow, Edinburgh College of Art and Leicester University (Museums Practice).

As an organisation, Hospitalfield are committed to building capacity and resources to engage with the education sector to provide further training opportunities.

## **Discovery Point Transformed (part of the Regional Culture & Tourism Investment Programme)**

Project Owner, Dundee Heritage Trust (DHT), has a long-standing commitment to inclusive growth and through the Discovery Point Transformed project will further this through multiple channels. The project seeks to deliver community benefits during both phases of its execution.

During Phase 1, the Project Owners have worked with local building contractors and suppliers to both deliver the building programme and provide employment. As Phase 1 is now completed, DHT's Education and Outreach team is activating community relationships to ensure that the Discovery Dome will be accessible at low or no cost to diverse audiences of all ages from socially and economically challenged backgrounds, including school students, using the indices of poverty to measure impact.

Discovery Point's starting position pre-Covid was 3,000 community participants and 8,000 school students. It's offer, staffing levels and budget were materially hit by Covid and we aspire to build back to these levels in a post-Covid environment. The full project, incorporating both phases, will allow the Project to expand its existing volunteer base from the local community, creating roles in guiding, visitor engagement, event delivery and ship maintenance. Dundee Heritage Trust will be attending the University of Dundee's Freshers Fayre with a view to attracting volunteers. Having seen a reduction in the number of elderly volunteers during the Covid pandemic, DHT are actively reaching out to the diverse communities of Dundee to build partnerships and encourage volunteering from those communities.

As part of Phase 2, DHT is addressing and correcting significant energy inefficiencies and is working to adapt the Discovery Point building from EPC G in use, targeting the achievement of a very good or better BREEAM grading and making use of the new spaces created during Phase 1.

Current quantitative targets for inclusive growth include:

- Achievement of a very good or better BREEAM grading from EPC G in use.
- A 10% increase in the volunteer pool/number of volunteer hours
- An increase in school student/family/attendance back to pre-Covid levels (including comp attendances for challenged students and communities)

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## **Pitlochry Festival Theatre**

Pitlochry Festival Theatre is a leader in Scotland in enabling access to theatre and the performing arts to people of all backgrounds. This is central to Vision 2021. The Project places people at the centre because people make the Theatre.

Throughout the capital infrastructure programme and the continued operational delivery of the project, Pitlochry Festival Theatre will strive to maximise the benefits to our community. This includes a commitment to providing local employment opportunities, engaging with local suppliers, and supporting local assets. A particular emphasis will be given to providing employment and training opportunities to those from diverse and/or disadvantaged groups, which is a key objective of the Theatre's own Equalities, Diversity and Inclusion framework. Groups are identified and targeted through direct marketing, engagement with relevant community groups and actively seek employment applications from diverse and/or disadvantaged groups.

The environmental impact of Vision 2021 has been fully considered, and meaningful steps have been taken to ensure we deliver sustainable growth. Pitlochry Festival Theatre has been removed from the gas supply network, replacing gas heating with air source heat pumps. Further investment will be made towards sustainable development, to realise our ambition of being carbon neutral by 2035.

Quantitative targets for inclusive growth measures during the construction phase may include:

- Appointment of contractors from within a set distance framework of the Tay Cities Region
- Apportion a percentage of spend to be retained within a set distance framework of the Region.
- We will commit to a set number of weeks to provide meaningful work placements
- We will commit to providing a set number of meaningful employment opportunities from diverse and/or disadvantaged backgrounds.

Pitlochry Festival Theatre will further define these quantitative targets as Phase 2 of the Project enters the design and construct phases.

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## Perth Museum

The development of Perth Museum as a major new museum attraction is rooted in the Council's strategic transformation programme for culture, addressing declining cultural tourism visits to Perth and broadening cultural participation amongst local audiences. The importance of cultural tourism to Scotland's economic wellbeing is reflected in key national strategies, to drive inclusive growth throughout Scotland by tourism market growth.

The Museum will provide a new headline attraction which will boost inclusive growth by:

- Creating direct and indirect employment, 19.7FTE direct employment opportunities, 21 FTEs at P&K level, 14 FTEs at Scotland level and 3 FTEs at UK level. Culture Perth and Kinross is a registered Living Wage Employer and all roles are paid at this level or above.
- Creating 1,500 volunteering and 30 community enterprise opportunities. To encourage take up, roles are widely advertised through local press and media, social media, organisational website and through voluntary sector partners including RVS and PKAVS, where applicable. There are strong local connections between organisations to share opportunities.
- Enhancing the visitor economy of the Tay Cities Region, generating an estimated 167,000 additional visitors to Perth by 2026/27. The project will also generate an average additional \$2.5m GVA annually to Perth and Kinross and £1.0M GVA annually to Scotland over 10 years.
- Enhancing the quality of life of the region, stimulating inward investment and attracting more, higher value jobs to reduce current dependency on the tourism, agriculture and service sectors.
- Enhancing education and lifelong learning for local communities of geography and interest, supporting improved life chances as a result. In practice, engagement and learning will begin with a comprehensive programme for primary and secondary schools, building on existing relationships. There will be programmes of talks and workshops for adults using the Collections as a route into a variety of topics from the acquisition of digital skills to research. Targeted projects will be developed collaboratively with key community groups such as the Tayside Mental Health Arts Trust and the Centre for Inclusive Living to ensure engagement is inclusive and that programmes reflect community interests and individual needs.

- Enhancing community well-being and resilience through civic pride and sense of place, by reinvigorating Perth's history as the original capital of Scotland. Qualitative data will be collected and collated over time through the use of online and in-venue survey data. Other local and national data gathering including from the Scottish Household Survey will be reviewed alongside locally generated findings to build a detailed evidence base to support measurement. A key set of Performance Indicators have also been identified for the project and these, along with a detailed benefits realisation plan will be monitoring on a regular basis.

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## Innerpeffray Library

The Innerpeffray Library seeks to enhance their approach to inclusivity across all areas of the organisation. The project aims to bring improvements that will develop the benefit to the community and its physical accessibility, which in turn improve the breadth and number of activities that the organisation is able to carry out.

Whilst small in scale, the Project is aiming high with our commitment to heritage and cultural inclusivity and will consider the sustainability of the project, environmental impact and transport use. The Project will increase the use of the outside space and also promoting walking and cycling and investigating community transport options for open days. Any new developments will take account of best practice for environmental impact.

Quantitative targets for inclusive growth for the project include:

- Run a minimum of six schools projects, offering opportunities to those pupils who are less likely to engage without support in the duration of the project.
- Active recruitment plan to involve four new volunteers from underrepresented groups in the duration of the project.
- Work with adult learners at Perth College and other partners to offer opportunities for engagement to enhance life and vocational skills: every two years. Continue to support University of Stirling PhD students.
- Run annual open day and 2 heritage activities annually targeted at hard to reach audiences.

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## Crieff International Highland Centre

The key aim of the Crieff International Highland Centre project is to establish itself as the hub of the community's sports, health and wellbeing for Crieff. Its objective is to work to improve the conditions of life for all in the town. This will be achieved through the provision of a centre for meetings, recreation and events for all age groups and abilities. By providing these facilities and offering help with the recreation for all in this inclusive centre it will provide benefits for everyone in the local community. The need for this hub is identified as a priority in the Crieff Community Action Plan 2021-2026. The specific inclusive growth targets will be developed further as the Project's business case evolves.

## Aero Space Kinross

The Aero Space Kinross project will deliver inclusive growth opportunities in relation to the 5 inclusive growth outcomes; productivity, population, participation, people and place in response to local needs and aspirations. This includes:

- Productivity – the creation of a new visitor centre in the heart of Scotland will add an important new economic engine to the Kinross area and add stickiness to the collective tourism offer of the region which will encourage more visitors, staying for longer and spending more.
- Population – a focus on public engagement with STEM, encouragement of learning on the specific themes of flight and space, partnership work with others, including sharing contemporary content from Scottish Universities, academics and flight and space focused businesses, will have much wider impacts on audiences. ASK will be a powerful advocate for STEM career engagement and will develop and target programming to ensure equality of opportunity amongst those at school age and above.
- Participation – Aero Space Kinross will employ fair employment practices and actively seek to promote diversity in its team in order to increase participation.
- People – Aero Space Kinross will play its part in eliminating inequality in terms of its work on education and learning and proactively develop initiatives and programming that support equality of access and opportunity.
- Place – Aero Space Kinross will deliver a meaningful new community resource that will have wider impacts than those directly attributable to the new Centre itself.



## Digital Theme

### Rural Angus and Rural Perth & Kinross High Speed Broadband

The Project aims to enhance fixed fibre and wireless connectivity to the rural parts of Angus and Perth and Kinross. The focus of the fixed fibre connectivity has been to provide full fibre gigabit capable connectivity to 186 public buildings across Angus and Perth & Kinross.

Many of these buildings now connected in Angus and Perth & Kinross are used by the community whether they be libraries, community centres or schools and may be located in the most remote rural areas where there is little existing fibre or wireless broadband connectivity. Connecting these buildings helps to connect communities directly to the internet. The benefits are that it becomes easier to connect homes and other buildings near to the buildings we have connected in the project and therefore gets broadband more quickly into otherwise digitally excluded communities. The benefits come in the form of education, communications, work/employment, shopping and general enhancement of quality of life that digital connectivity brings.

The Project also looks to increase the availability of Internet Connectivity to Rural Business/Households in Rural Angus, closing the Digital divide between Rural & Urban environments. The infrastructure will allow the Rural Communities/Businesses to participate & compete with their peers located in an Urban environment, driving innovation, new ways of working, access to online services, access to online training, create rural businesses etc. One of the major disadvantages of living in a Rural location has been removed “Digital Connectivity”.

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### 5G Digital Testbeds

The 5G Digital Testbeds project outlines its commitment to inclusive growth as part of the business case and covering Equality Impact and Fairer Scotland Impact Assessment, Socio-Economic Benefits and Approach to Inclusive Growth. The Project is seeking to deliver benefits and outcomes whilst operating within the capital eligibility requirements of city deal projects and as applied to Tay5G, being a Research & Development project. The Project is also seeking opportunities to collaborate with the Tay Cities Deal Skills Programme and relevant projects. Furthermore, the Project continues to work with Dundee City Council to inform and seek inclusion of skills areas pertinent to 5G, associated technologies and vertical sectors. The latter are wide ranging and encompass areas such as construction, media production, agritech and smart ports.

Digital sectors and services for vertical sectors offer significant potential for inclusive growth across both diversity and SMEs. For example, use case trials are in a position to deliver outcomes across the business growth and skilled population priorities. Business growth outcomes include engagement with SMEs who will obtain a greater awareness of opportunities arising from 5G, routes to engage with 5G and an improved position to pursue related markets and opportunities. Skills outcomes will be delivered through engagement with organisations in the educational ecosystem such as universities, colleges and Developing the Young Workforce to raise awareness of the opportunities and skills needed for 5G and 5G supported applications.

The approach is exemplified across:

- Business Growth through projects engaging with SMEs as partners or collaborators and catalysing their engagement with opportunities.
- Development of knowledge and skills through SMEs (including individual freelancers) engaging with expertise through the Scotland 5G Centre and regional universities.
- Skills and business opportunities by showcasing these and education pathways through delivery of use case trials. Education pathways are predominantly universities and colleges and we are focusing engagement on those in the Tay Cities Deal region. This is augmented by engagement with organisations such as Developing the Young Workforce and the Employability Services run by Tay Cities Region councils.

## Transport Theme

### Low Carbon Transport & Active Travel Hub

The Low Carbon Transport & Active Travel Hubs Programme will be encompassed by 3 phases. The inclusive growth targets will be explored further as each phase is developed.

All three phases of the Programme aim to support the National Transport Strategy (2) stated aims of improving inclusive growth to enable people fair and affordable access to transport modes to reach the jobs where they can be most productive and boost both business growth and household incomes through improving access to employment.

**Phase 1 of the Programme is the Broxden – Low Carbon Transport Hub Project.** The project aims to add seven new Rapid EV chargers and eight 7kW EV chargers to accommodate a variety of EV usage patterns, bringing the total EV charging spaces at the site to 37. The project will support businesses and support improved mobility to access employment by providing the re-charging infrastructure to support businesses and communities that may not have the space or the funding to develop their own EV charging facilities and will also provide reliable EV charging support to visitors to the area. The expansion of EV charging facilities at Broxden Park & Ride will be available to all to use, including the first disabled / mobility impaired accessible EV charger in the Perth and Kinross area. An innovative solution is being provided that will incorporate on-site renewable generation of electricity, that will be optimised by means of a smart energy management and battery system to reduce the carbon footprint of the EV charging infrastructure by maximising the use of on-site generated renewable energy and reduce the costs of providing energy to support the EV charging facilities.

The community benefits generated from the procurement of the project outputs in phase 1 at Broxden will be used to support employment and training/work experience opportunities in the area by arranging site visits for schools / colleges to see at a practical level what is involved in delivering infrastructure projects and how infrastructure projects are managed and how on-site health and safety mechanisms work to ensure the safe delivery of the project outputs.

**Phase 2 of the Programme is the Perth – Active Travel Hubs project.** The aim of the Active Travel phase of the programme is to support the sustainable travel hierarchy and create an active travel hub and network of low carbon and shared and active travel facilities across Perth. With the aim of providing credible alternatives to using private cars and for non-car owners by developing and deploying active travel facilities, services and infrastructure in and around Perth.

In line with the NTS2 vision for a sustainable, inclusive, safe and accessible transport system, helping deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors, the phase 2 of the programme will encourage and priorities sustainable transport solutions and create active travel options by developing and improving walking, wheeling and cycling routes in and around the city and providing active travel infrastructure, facilities and services including deployment of bike hire facilities across Perth and a car club. Engagement with the disabled and mobility impaired community has begun (consultation with the Centre for Inclusive Living – Perth and Kinross) and will continue for this phase of the project to ensure as much of the new active travel services and facilities are accessible and useable for the disabled or mobility impaired.

**Phase 3 – Perth – Hydrogen Refuelling Station.** In the third phase of the programme the aim is to deploy the first publicly accessible hydrogen refuelling station in the Tayside region to support the uptake of hydrogen transport and contribute to a regional and national hydrogen refuelling network.

It is the intention of Perth and Kinross Council to develop a publicly accessible hydrogen refuelling station in the Broxden area as a third phase of the programme in 2027-2029. This Hydrogen development will assist the governments' aims for Hydrogen and broaden the range of alternative low carbon transport fuels available. This would be the first in the Tay Cities area and would provide an important component of Hydrogen refuelling infrastructure at this strategic node on the Scottish motorway network.

The issues of inclusive access to hydrogen refuelling facilities as not been well tested so far. The hydrogen refuelling system requires a locked connection to transfer compressed hydrogen at around 700bar for cars and light vehicles and 350bar for heavier vehicles at a temperature of around minus 252C. PKC will work with the hydrogen station developers and manufacturers and the disabled and mobility impaired community to deliver an inclusive Hydrogen station that will provide hydrogen refuelling facilities for all that wish to use them.

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## Perth Bus and Rail Interchange

The Perth Bus and Rail Interchange Project will look to ensure equal access to improved transport services while creating opportunities across all sectors of society. The Project, through improved infrastructure, will help tackle inequalities and particularly look to provide opportunities for increased prosperity for disadvantaged groups. It's commitment to the inclusive growth agenda will be further considered as the project develops.

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## Dundee Airport Investment

The Dundee Airport Investment Project seeks to enhance the role of Dundee Airport as a strategic transport hub, supporting both the Connected Tay and Innovative & International Tay strands of the Tay Cities Region Deal. Connectivity is recognised as a key driver of sustainable economic growth and capital investment in the airport and support for the development of new routes (in the UK and potentially to European hubs) will support economic growth in terms of perceptions of the region as a place to do business, making it easier of local companies to do businesses nationally and internationally, making the region more attractive to key workers and supporting growth in visitor numbers.

The Project has identified key needs to ensure that the airport has the potential to grow, but the development of the Business Case is at an early stage. Key elements related to inclusive growth will be considered as the project develops. This will include:

- A focus on community benefits during the construction phase of the project
- A focus on regional supply chains as the project is developed and delivers
- Supporting work experience roles where appropriate going forward and link with projects within the Employability & Skills programme and the Aviation Academy for Scotland
- Considering key issues related to environmental sustainability and how future airport operations can do their best to minimise those impacts

- Provide insight into the indirect benefits of the airport and the potential of economic growth across the Tay Cities connected programmes to deliver on inclusive growth
- Consider whether any Community Wealth Building objectives can be supported by the project

As the business case develops greater clarity will form on the actual inclusive growth targets that the airport will move towards.



Smarter + Fairer



Tay Cities Region Deal

# BENEFITS REALISATION PLAN

REPORT 3 | September 2023



Funded by  
UK Government



Scottish Government  
Riaghaltas na h-Alba

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# Introduction

## Purpose

The purpose of this Benefits Realisation Plan (BRP) is to demonstrate, to our local, regional and national stakeholders, how the Partnership (we) will capture the outputs, outcomes, and impacts resulting from Tay Cities Region Deal investments. It is the Partnership's approach to monitoring and evaluation.

In this document, "Project" relates to the Programmes, Fund and Projects within the Deal.

The Benefits Realisation Plan will:

- Identify, collate and explain the collective benefits of the Deal as a whole;
- Outline the processes followed by the Tay Cities Region Partnership to maintain a regular record of project delivery;
- Provide a framework for constructive evaluations of Projects; and,
- Act as a guide for the Project Owners for monitoring and evaluation.

This Plan, therefore, sets out our approach to:

- Project monitoring and reporting, including definitions guidance; and
- Both the Deal Programme and project evaluation.

Updates to the Benefits Realisation Plan will be reviewed annually as part of the Annual Performance Report.



# Strategic Context and Objectives

## Deal Overview

The Scottish Government and UK Government will each invest up to £150 million in the Tay Cities Region Deal (the Deal). This investment has the potential to secure over 6,000 jobs and lever in £400 million of investment over 15 years. It will enable the region to:



**INCLUSIVE**TAY

### Empower & promote inclusion

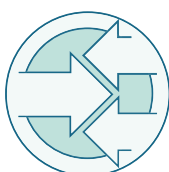
by ensuring that local people have the skills they need to succeed in the modern workplace and that growth is inclusive;



**INNOVATIVE**TAY

### Innovate & internationalise

by developing globally recognised clusters of academic and business excellence; and,



**CONNECTED**TAY

### Connect

by improving physical and digital infrastructure.

Table 1 sets out the investment from both the UK and Scottish Governments, split by the themes in the Deal.

Table 1: Total Anticipated Deal Contributions

Tay Cities Theme	Governments (£m)
Skills	30.1
Innovative and International	188.2
Culture and Tourism	49.7
Digital	4.0
Transport	28
<b>Total</b>	<b>300</b>

Table 2 sets out the proposed Jobs and Leverage commitments at Deal Signing/approved current position, split by themes in the Deal.

The jobs commitments reflect those at Deal Signing or if a business case has secured approved, whichever is most recent. If a Project has an approved commitment as part of a change request, the new agreed commitment is reflected. The figures shown in Table 2 reflects the Annual Performance Report 2023.

There are some Projects who will need to refine their Deal Signing commitment as they develop their business case. At the moment, there is a forecast additional jobs above the 6,000 job commitment. This will be informed by the benefits reporting and updated in the Benefits Realisation Plan annually.

**Table 2: Total Anticipated Jobs and Leverage**

Tay Cities Theme	Proposed Jobs	Leverage (£m)
Skills	148	0.5
Innovative and International	5,626	332
Culture and Tourism	644	54
Digital	0	6
Transport	459	7.5
<b>Total</b>	<b>6,877</b>	<b>400</b>

## Inclusive Growth Challenges

In broad terms four interlinked challenges were identified, as detailed in the Deal Document:

- Weak Productivity and Slower Growth
- Skills, Health Outcomes and Earnings
- Low Income
- Need for Sustainable Places

A separate document has been designed to detail each of the Deal Projects' Inclusive Growth Statements as a supplement to the Benefits Realisation Plan. It is available on request and will be updated in line with the annual Benefits Realisation Plan review.

## Benefits Realisation Plan Audiences

The list below outlines the audiences who may wish to use or have an interest in the outputs of the monitoring and evaluation approaches proposed within this Plan. For both the Governments and the Tay Cities Region Deal Partnership, monitoring and evaluating the Deal outcomes and impacts will allow learning to inform future policy, strategies and plans.

- **UK and Scottish Governments as well as the Scottish City Region and Growth Deals Delivery Board** - to enable them to monitor and review progress of the delivery of the Tay Cities Region Deal outcomes and impacts;
- **Accountable Body/Auditors** - to consider achievements as well as any interventions that have been less successful, and understand what evidence is available and how it is collected;

- **Tay Cities Region Deal Partnership**
- **Tay Cities Region Joint Committee** - in their role as the primary decision-making body for the Deal overseeing investment and approving all relevant business cases;
- **Tay Cities Management Group** - as this Group is tasked to: support the Joint Committee in the delivery of the Deal, ensuring that it is aligned towards achieving its inclusive growth ambitions; monitor delivery of milestones (including benefits realisation); and, identify priorities and develop solutions to maximise private sector investment in the Tay Cities region;
- **Finance Directors Group** - that supports both the Management Group and Joint Committee in overseeing the Deal's finances; ensures that the Deal funds are being spent as set out in the Financial Plan (and therefore the consequent outputs anticipated under this Plan are likely to be delivered); and considers and escalates any risks to the Management Group;
- **Heads of Economic Development** - across the four Councils that, amongst other roles, are tasked to provide support and challenge to projects within the Deal provide advice as required. They also lead for the partnership on the delivery of Inclusive Growth and the Regional Economic Strategy Action Plan;
- **Tay Cities Region Enterprise Forum** - from a business and third sector perspective this forum will provide knowledge and expertise to the Joint Committee and Management Group to assist them in implementing the Deal and achieve the benefits committed to. The Enterprise Forum will be able to use Benefits Realisation reporting to reflect on findings and consider opportunities for future funding as part of the Deal and other areas of work;
- **Tay Cities Region Higher Education/Further Education Forum (HE/FE Forum)** - which, from an education sector perspective, will adopt the same roles as the Enterprise Forum above; and,
- **The Five Thematic Boards** - given their role to develop and maintain oversight of projects across the five Deal themes and, in particular, reviewing and assessing business cases (and any requests for change to approved projects) and leading and maximising collaboration (and benefits realisation) across other Deal themes and other regional stakeholders.

## Programme Theory of Change

All of the Projects, as a result of the work initiated by this Plan:

- Are in the process of developing or have developed their individual Logic Chain Models as part of their business case; and,
- Given the above, will provide the PMO, using the reporting template at Appendix C, with information in relation to the outputs, outcomes and impact measures they will use and timetables over which they will report these measures.
- Prior to the completion of this work - and for the purposes of this Plan – a high-level Logic Model has been developed, as outlined at Table 2. It will be updated as individual Logic Chain Models come forward.

As illustrated, Table 3 provides a broad overview of:

- The **inputs and activities** identified within the Deal;
- Main **beneficiary groups/conditions** (in terms for example of the Region's residents and environment) that will be impacted by these activities;
- Short term **direct outputs** that will result within these groups/conditions on completion and operation of Programme facilities and interventions;

- A range of **intermediate** medium-term impact indicators of relevance to each project that they will seek to capture, against agreed baselines and outcomes; and,
- A **minimum number** of long-term impacts that focus, at an overall level, upon the sustainable benefits of the Deal in terms of:
  - Economic growth, including sustainable employment growth and increases in investment and associated returns;
  - How the above is aligned to and supports the delivery of the Deal's inclusive growth objectives; and,
  - The associated developments that might be linked to the Tay Cities Region Deal, over and above those initially identified under the capital and revenue expenditure across the Deal.

Table 3: Deal Programme Logic Model by Tay Cities Region Deal Theme

SKILLS THEME	
<b>Input (£m)</b>	30.6
<b>Activities</b>	Projects targeting skills development for other Tay Cities Region Deal projects and reskilling in both the region and Scotland’s aviation & engineering sectors
<b>Main Beneficiary Groups</b>	Tay Cities region residents - age, gender Protected characteristics/Communities - disadvantaged, SMID, rural Businesses - SMEs, sectors, Investors
<b>Short Term Outputs</b>	Increase total number of beneficiaries Increase sustainable new job opportunities Increase number of businesses directly supported by projects within this theme Increase number of beneficiaries supported into sustainable employment Increase number of businesses receiving support to 1) improve their understanding of the recruitment needs and challenges they face, and 2) increase their ability to access suitably skilled staff (as measured in the Employer Skills Survey) Uplift in skills and employability – additional accredited training and skills improvements Development of a pan-regional skills development and employability approach, built on enhanced cooperation, collaboration, and partnership working 600m <sup>2</sup> Centre of Excellence for Tay Cities Engineering Partnership resulting in a space for companies to access, projects to evolve and £500k private sector investment in equipment
<b>Medium Term Impacts</b>	Increased number of participants are in sustained employment Enhanced partnership working within and across all local Authority areas Service quality is standardised across Local Authority areas Benefits for individuals- skills and personal development, health, and wellbeing Upskilling and targeted support for low paid individuals and those further from labour market Improved alignment with specialist support - Housing & Health and Criminal Justice Improved Business Base benefitting from a diverse and skilled workforce Increased employer engagement to facilitate employment of participant groups and deliver Fair Work Increased regional productivity Industry led upskilling programmes addressing the needs of the existing and emerging sectors
<b>Longer Term Impacts</b>	Making a positive contribution to: Levels of qualifications and skills across the City Region, providing a skilled workforce, equipped for the requirements of the labour market Improving the employability landscape Integration and alignment of employability services within Tayside with effective support and service provision in urban and rural areas Increasing the employment rate Decreasing unemployment/economic inactivity rate Reducing the number of workless households Improving equality and diversity across the region Uptake of the Fair Work Reducing levels of child poverty and deprivation Increased uptake of companies using digital technologies and advanced manufacturing techniques for design, prototyping and POC Increased productivity in the engineering and manufacturing sector Providing a skilled workforce equipped for the needs of the EAM sector

<b>INNOVATIVE, INTERNATIONAL THEME</b>	
<b>Input (£m)</b>	520.2
<b>Activities</b>	Development of a range of bio-medical, food, environmental, cybersecurity, and legal sector focused facilities
<b>Main Beneficiary Groups</b>	Construction and supply chain Relevant sectors Tay region residents Students
<b>Short Term Outputs</b>	Construction and Supply Chain jobs Community Benefits as a result of procurement practices Site Occupancy & Service take up Student/ Start-ups take up Indirect impact resulting in reduced carbon emissions
<b>Medium Term Impacts</b>	New jobs created Student wage uplifts Research & Adoption uplifts and other Investment secured New theme supported SMEs/Start-Ups Student wage uplifts Knock on or wider falls in carbon emissions
<b>Longer Term Impacts</b>	Sustained employment/wage rate uplifts. Returns on Investment Inward Investment Increased knock on or wider falls in carbon emissions

<b>CULTURE &amp; TOURISM THEME</b>	
<b>Input (£m)</b>	103.7
<b>Activities</b>	Development of seven tourism & culture projects to enhance the offer and reputation of the Region as a visitor destination
<b>Main Beneficiary Groups</b>	Construction and supply chain Tourism and Culture sectors
<b>Short Term Outputs</b>	Construction employment & apprenticeship opportunities and wider community benefits Community Benefits as a result of procurement practices Uplift in day visitors, including domestic visitors, visitors from out-with the region (UK) and foreign visitors (Relevant) Site Occupancy Minimised whole life and embodied carbon Enhance partnerships with local education providers and community groups working with TCRD partners and more widely
<b>Medium Term Impacts</b>	Quality jobs created and safeguarded Investment secured Regional Economic Multiplier effects of wider visitor spend Additional high quality / high value tourism to the TCRD Region A positive contribution to inclusive growth by influencing and supporting the culture and tourism sector
<b>Longer Term Impacts</b>	Sustained theme related employment Enhancing the offer of the region as a tourist destination Returns on investment

<b>DIGITAL THEME</b>	
<b>Input (£m)</b>	10
<b>Activities</b>	Development of High Speed Broadband & 5G Testbeds to enhance access in rural areas with little or no current connectivity
<b>Main Beneficiary Groups</b>	Construction and supply chain Users, including public sector, industry, academia, third sector and citizens
<b>Short Term Outputs</b>	Construction and supply chain jobs Community Benefits as a result of procurement practices Infrastructure in place Minimised whole life carbon costs Reduced costs and barriers to 5G deployment Increase in 5G Research & Development (R&D) investment Increased commercial certainty about 5G Increased participation and collaboration within the 5G ecosystem Enhanced perceptions of 5G regionally and nationally
<b>Medium Term Impacts</b>	New jobs created Investment secured Improved Connectivity Wider user benefits Commercial scale up of 5G technologies and uses Knowledge spill over – research outputs, patents developed 5G professional skills and expertise develops Enhanced sustainability of 5G projects/ecosystem Tay Cities region becoming a leading 5G and technology region
<b>Longer Term Impacts</b>	Sustained theme related employment Associated (user) productivity uplifts Accelerate and/or enhance deployment of 5G Attract inward investment in telecoms and digital Earlier realisation of benefits from 5G



<b>TRANSPORT THEME</b>	
<b>Input (£m)</b>	35.5
<b>Activities</b>	Perth Bus & Rail Interchange, Low Carbon and Active Travel hubs and Dundee Airport improvements
<b>Main Beneficiary Groups</b>	Construction and supply chain Users
<b>Short Term Outputs</b>	Construction and supply chain jobs Community Benefits as a result of procurement practices Infrastructure in place Minimised project related whole life carbon costs User modal shifts Increased airline passengers
<b>Medium Term Impacts</b>	Transport benefit improvements (e.g. safety, journey times, modal split, air quality, reduced emissions) (Air use related) Business time savings (Air use) Net tourism impacts
<b>Longer Term Impacts</b>	Sustained transport benefit improvements Business/tourism employment due to improved accessibility and builds on the attractiveness of the region as a destination for tourism and business Inward Investment

## Reporting Roles and Responsibilities

### Roles

In reporting outputs and impacts, the Partnership is committed to:

- Adhering to the overarching principles of Government best practice in project and programme delivery;
- Selecting appropriate monitoring and evaluation approaches to best measure progress in meeting the inclusive growth objectives and impacts associated with the Deal;
- Regularly updating this Plan and associated reporting protocols; and,
- Adopting other new measures that will help assess and support the better management of Deal activities and impacts.

Consequently, the Partnership have - over the 15-year lifetime of the Tay Cities Region Deal – committed to:

- Delivery objectives and associated performance indicators will consistently be aligned to the stated output and impact objectives, as set out in the Deal Document and agreed at Deal Signing;
- Monitoring and evaluation will be used to confirm that: the benefits associated with these outputs can be realised; risks of non-delivery can, where appropriate, be managed; and, unjustified work can be terminated;
- Governance, management frameworks and monitoring and evaluation approaches are proportionate and appropriate to the work and levels of prevailing risk associated with each related Project delivery;
- Sharing, monitoring and evaluation approaches, resources and good practice across the Partnership and with the Government will help to minimise the costs associated with monitoring and evaluation, while also aiming to maximise future benefits particularly across Programme interdependencies. This will include:
  - Adopting common data sets, definitions and reporting cycles to allow comparisons to be drawn between Projects and, where appropriate, Deal Programme level; and,
  - Using existing data sources and streamlining any new data collection as much as possible.
- The suitability of selected indicators, outputs and outcomes will be subject to ongoing review in the light of alternative data sources/approaches to measurement becoming available.

### Reporting

There is a current established quarterly reporting regime in place for the Partnership. All of the Programmes, Fund and Projects have been asked to show the delivery of their outputs, outcomes and impacts on an annual basis, in line with the Annual Performance Report. This is to enable to Partnership to align the reporting with the Annual Performance Report that has been set by Governments. From April 2022, this reporting regime integrated the Benefits Realisation reporting requirements as part of the other reporting obligations.

Quarterly performance meetings, between the PMO and Government representatives, cover project progress by exception, financial monitoring, and performance, including monitoring and evaluation. An overall Programme Risk Register and Performance Monitoring Report with any recommendations will then be considered by Thematic Boards, Management Group and the Joint Committee.

This will allow updates on progress towards outputs and benefits to be highlighted in the Annual Performance Report and Implementation Plan to assess on an ongoing basis how much impact the Deal is having on agreed inclusive economic growth outcomes.

# Monitoring Approach

## Purpose of Monitoring

The monitoring and reporting of benefits associated with the Deal's Programmes, Fund and Projects is required to ensure effective management of the Tay Cities Region Deal. This will enable progress on the delivery of outputs and targets to be reported to all partners and the Governments.

## Baseline Information and Gaps

To support reporting, Programmes, Fund and Projects will provide baseline data. This will be used to demonstrate uplift and change. Any gaps in baseline data, outputs and targets, will need to be highlighted and addressed through future Benefits Realisation reporting, including where a project has indicated data is still to be confirmed.

It is also expected that progress towards establishing a target where there is a current gap should be demonstrated. This includes agreeing any revised baseline position, using the change control process, to take account of the impacts of COVID, Brexit or other unforeseen external factors post Business Case approval.

## Outputs, Outcomes and Impacts

The funding committed to the Deal by the UK & Scottish Governments will lead to the overall Deal outcomes of over 6,000 jobs and securing £400m of leverage. The Tay Cities Region Deal approach to Benefits Realisation will ensure that the direct links between the Project outputs and the Deal outcomes can be captured.

Projects will be required to report against agreed outputs, outcomes and impacts that were committed to at Deal Signing and in approved business cases. Project owners, and the relevant Director of Finance for the project, will also confirm annually that the outputs, outcomes and impacts reported align with agreed commitments (including any approved changes relative to the original business case) within the most recent Benefits Realisation report and Implementation Plan.

As part of the initial reporting process, Projects will be asked to profile their outputs, outcomes and impacts so that the timescales for benefits realisation can be understood.

To ensure consistent reporting across the Deal a:

- **Guidance document** (Appendix A) was developed and agreed to inform the Partnership's commitment at Deal Signing; and a,
- **Reporting template**, for use by all Projects, has also been developed (Appendix C) in order to ensure agreed outputs, outcomes and impacts can be consistently reported and progress compared across projects, themes and the overall Deal.

Figure 1 provides a high-level summary of the outputs indicators that are likely to be adopted against the five Deal themes.

The Partnership are committed to updating this summary to map the outputs against the five Deal themes in line with the with Benefits Realisation reporting.

Figure 1: Tay Cities Region Deal Outputs, Outcomes and Impacts

Indicator	Skills	Innovative & International	Culture & Tourism	Digital	Transport
New jobs	✓	✓	✓	✓	✓
Construction jobs	✓	✓	✓	✓	✓
Jobs protected	✓	✓	✓	✓	✓
Training places	✓	✓	✓	✓	✓
Journey time savings					✓
Development space unlocked	✓	✓	✓	✓	
Visitors			✓		
Start-Ups	✓	✓			
SME's supported	✓	✓	✓	✓	✓
Leverage - Private sector investment	✓	✓	✓	✓	✓
Leverage - Other	✓	✓	✓	✓	✓

## Definitions

A set of 11 definitions for outputs were developed and agreed ahead of Deal Signing. These are set out in Appendix A. They inform the commitment that the Partnership entered into Deal including the 6,000 jobs and £400m leverage. They are the commitments against which all Business Cases are reviewed.

At Deal Signing a number of the Projects had TBC's against their commitments. This reflected, in some cases, that they were in the early stages of development. As each Project their business cases for approval by the Joint Committee they will be required to set out what their outputs are.

It is recognised that there are a number of outputs that projects have identified in addition to the agreed 11. These will also be captured and reported on.

## Carbon Management

On 18th August 2021, the Scottish Government issued guidance relating to carbon assessment and management on behalf of both Governments. This was developed to meet Scotland's net zero whole life carbon emissions trajectory by 2045. Within the guidance, a set of carbon definitions were defined to support reporting. These are set out in Appendix B. Training and support continues to be provided by the Scottish Government to facilitate an understanding of the whole life carbon cost implications of all projects across the Deal. This will support Programmes, Fund and Projects to implement the guidance.

The carbon emissions impact of a Deal is considered by the Scottish Government to be a key output, therefore it is expected to be included in a Benefits Realisation Plan (BRP). Due to the varied nature of Deal projects, 'Carbon Emissions Impact Key Performance Indicators (KPIs)' should be chosen to suit the Deal and its projects' characteristics.

Projects should be able to demonstrate their understanding of the carbon emissions impact of their project by utilising the Scottish City and Regional Growth Deals Guidance Categorisation Form. Where appropriate, advice and support will be provided as required on request of the Scottish Government, via the PMO. This will be in the form of training and support sessions, for example.

## Risks

As part of workshops held with all year 1, 2 and 3 programmes/projects for the Tay Cities Region Deal in January 2022, a number of risks were highlighted including inflationary impacts, changes to baseline data as a result of Brexit and Covid implications, and resource/capacity issues related to long-term monitoring and evaluation.

These risks are still relevant, and the pressures relating to inflation have and continue to remain a standing item across all parts of the TCRD governance. This, coupled with the deliverability of the Deal Programme from years 5 – 10, is a risk to benefits being realised by 2035. This is being actively discussed with the Partnership and Governance and will be monitored through reporting.

Any update to the risks will be provided as part of future Benefits Realisation Plan updates and the Deal's Risk Register.

# Evaluation

## Annual Performance Report

An Annual Performance Report is produced in Q3 annually, which outlines the activities of the Deal in the previous year, from 1st October to 30th September, and the proposed priorities for the upcoming year. This will also include a financial statement, updates for the Deal Projects that have been approved, and benefits updates.

The Annual Performance Report is available at the end of each financial year on the [Tay Cities website](#).

## Project Evaluation

Understanding the impact of the Deal beyond the delivery of the direct outputs and outcomes, is an important part of achieving the aspirations of the Deal. Projects, Programmes, the Fund and the overall Deal will all be part of the approach to evaluation.

All Projects, in line with the HM Treasury Green Book, are required to set out evaluation arrangements as part of the Management Case in their business case. Any Project may be asked to provide a report, evaluating the performance against agreed baseline information and subsequent outputs and outcomes. Project Owners will also be required to evaluate how the Project has delivered against the overall Deal commitments.

The PMO will develop a schedule of potential evaluation reports utilising the evaluation arrangements set out in an approved business cases, in parallel to the publication of this Benefits Realisation Plan update. The list will determine a list of Project(s) that may be asked to produce an evaluation report, and inform a recommendation to the Thematic Board and Management Group to agree.

This will commence from Year 5 (2024/25) and then every year thereafter, if there are feasible Projects, to ensure that there is representation of at least 1 Project in each thematic area. Given the number of Projects within the Tay Cities Region Deal, evaluations will be sought from a selection of Projects only.

Evaluation reports will also be required and provided by select Projects at the end of the Deal term, following completion of all monitoring. This is by the end of 2034/35.

All parts of the Deal Partnership will be provided with resultant evaluation reports, and will be invited to provide comment, where appropriate. As highlighted above, the Annual Performance Report will be an opportunity to demonstrate wider impacts of the Projects and on the Deal Programme on an annual basis.

## Selection Process – Role of the Thematic Board and Partnership

As part of the selection process, each TCRD Thematic Board will be asked to consider the evaluation arrangements that are already agreed as part of the business case review process.

The Thematic Boards are recommended to consider and review Projects based on their stage of implementation, if they are an innovative Project, and consider the value of each Project.



The role of the Thematic Board in evaluation builds on the existing purpose of each Board, per the Terms of References, to support regular progress reporting on all Projects to funders and key stakeholders; this includes the Partnership and Governments.

The scope of the evaluation will be agreed by each Thematic Board at this stage.

Projects that are selected will be recommended by the Board to the Management Group for consideration and agreement, prior to any Project being asked to complete an evaluation report. This will include the proposed scope of evaluation and timescales for the evaluation to be completed.

### **Role of the Project Owner**

Those selected will be asked to complete an evaluation report to assess their performance, in line with the **HM Treasury Magenta Book**.

As a minimum, Projects must provide a case study(s) and utilise the benefits realisation reporting of outputs to produce the evaluation report. The report should not only be specific evaluation for each Project's investment, but should also show how it has delivered against the Deal.

### **Programme/Fund Evaluation**

The Deal Fund and Programmes will also be required to produce an evaluation report at the end of the Deal term, following completion of all monitoring. This is by the end of 2034/35. This will include an overview of Deal commitments achieved and case studies, in line with the Magenta Book.

### **Deal Programme Evaluation**

As part of the next update of this Benefits Realisation Plan, the TCRD Partnership will review the approach for the Deal Programme evaluation. This will take account of other Deals best practice.

Approaches that may be considered include, but are not limited to, an external interim evaluation of the Deal Programme in line with the Magenta Book or an internal evaluation, for completion in 2025/26. This will be repeated at the end of the Deal Term in 2034/35, once all monitoring of the Deal's commitments has ended.

These reviews will enable progress towards prescribed milestones as set out in the Deal Implementation Plan to be reviewed and evaluated, and will be in line with the Deal Document. An interim evaluation will also be an opportunity to identify priorities for the next phase of delivery.

For the Deal Programme evaluation, it has been agreed in the Deal Document that both Governments will work with the Joint Committee to set the terms of the evaluation and consider its recommendations.

There will also be an opportunity as part of future reviews of the Benefits Realisation Plan to consider evaluation of specific themes for the Deal, for example clean growth.

## Change Control

The **APMG** managing benefits guide identifies five main sources and/or outcomes of change that can negatively affect benefit delivery, all of which are potentially pertinent to the Deal. There are:

1. Forecasting failure: for example, benefits are not identified or are overestimated;
2. Delivery failure: i.e. the failure to deliver a project with the planned functionality or on time, so impacting on the scale and timing of benefits realisation;
3. Business and behavioural change failure: i.e. the business and behavioural changes on which benefits realisation is dependent do not occur or are poorly scheduled causing delays in benefits realisation;
4. Benefits management failure: in relation to capturing and leveraging emergent benefits and mitigating dis-benefits; and,
5. Value for money failure: the benefits are realised but at excessive cost.

For change control to be effective benefits must be measurable and link outputs to strategic goals. If such benefit measures are in place: **“change control ensures only beneficial or necessary changes to the baseline are implemented”**.

The Tay Cities Region Deal Change Control Process has been developed and agreed by the Governments and Partnerships and is detailed at Appendix B.

# Appendix A

## Tay Cities Region Deal: Outputs, Outcomes and Impacts Guidance and Definitions

### Tay Cities Outputs Definitions at Deal Signing

Prior to Deal Signing in December 2020, a set of outputs & definitions, as set out in Table 4, were agreed by both Governments and the Partnership and shared with all named Projects to support them in developing their own outputs. At the time, each owner was asked to consider and provide figures, where appropriate, at the SOC stage recognising that not all of the outputs were relevant. From this exercise, the Heads of Terms were developed and included the commitment to over 6,000 jobs and £400m leverage.

Table 4 – Deal Signing Outputs Definitions

Output	Definition
New Jobs	New, FTE, permanent, paid job created as a result of the project
Construction Jobs	New, FTE, permanent, paid job created with construction sector partners as a result of the project (including apprenticeships)
Jobs Protected	FTE, permanent, paid job retained in the organisation/sector as a result of the project (including apprenticeships)
Journey Time Savings	Improvement in journey times (minutes) between point A and point B as a result of the project
Development Space Unlocked	Additional space (m <sup>2</sup> ) created as a result of the project
Training Places	Number of additional training places created as a result of the project (excluding apprenticeships)
Visitors	Number of visitors attracted to the project
Start-Ups	The number of new businesses created as a result of the project
SME's Supported	The number of business (with no more than 250 employees) supported by project activity
Private Sector Investment	Funding from non-public sector sources
Leverage	Leverage is defined as any funding/contribution to total project costs excluding Tay Cities Deal funding and unrecoverable VAT.
- LA leverage	Funding/Contribution secured from Local Authority partners
- HE/FE Leverage	Funding/Contribution from HE/FE partners to the project
- Private Sector Leverage	Funding/Contribution from Private Sector partners
- Any other leverage	Funding/Contribution from any other parties to the project

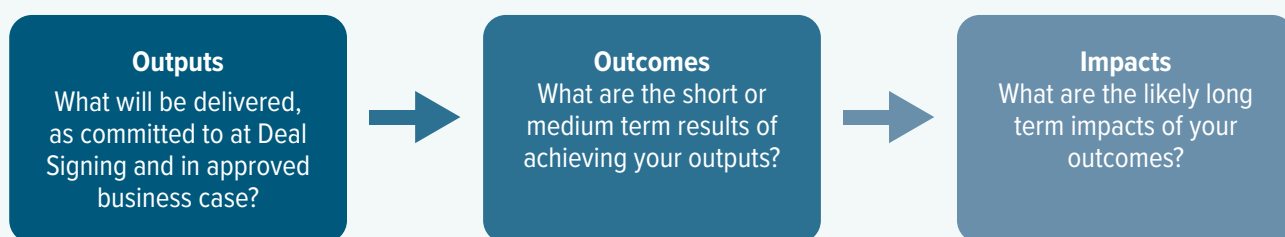
In developing business cases, Projects may commit to additional outputs which will be captured in the reporting.

### Definitions Guidance

To help with benefits reporting, a guidance note will be developed to provide support when considering outputs, outcome and impacts. The PMO will continue to liaise with the National PMO Networking Group to develop a set of definitions guidance, to support all Deals. Any guidance will be shared, as appropriate.

The list provided will not be exhaustive and will take examples from Benefits Realisation reporting as this evolves: additional project specific outputs, outcomes and impacts, as agreed at Deal Signing and in approved Full Business Cases, should be considered and reported where appropriate. Figure 2 provides a high-level summary of what to report against outputs, outcomes and impacts.

Figure 2 – Reporting example and high-level definitions



### Carbon and Environmental Definitions

As noted in Section 5 of the Plan, the Scottish Government issued guidance, on behalf of both Governments, relating to carbon management in August 2021 and updated in August 2022. Within the guidance, a set of carbon definitions were defined to support reporting. These are set out in Table 5. Training and support continues to be provided by the Scottish Government to facilitate an understanding of the whole life carbon cost implications of all projects across the Deal.

In addition, it is a requirement that all projects must complete Appendix A of the Scottish City Region and Growth Deals Carbon Guidance so that the Governments are able to understand the likely impact of each project in relation to carbon impacts. This is a minimum requirement; however, any other commitments to carbon related outputs and monitoring is welcomed. The following table includes a range of example Carbon and Environmental Outputs.

Table 5: Example Carbon and Environmental Outputs

Definition	Evidence
<b>1. What are the embodied carbon emissions resulting from the project? (tonnes CO<sup>2</sup>e)</b>	
<p>Embodied carbon is the total greenhouse gas emissions (often simplified to “carbon”) generated to produce a built asset, excluding operational emissions. CO<sup>2</sup>e is shorthand for carbon dioxide equivalents, the standard unit in carbon accounting to quantify greenhouse gas emissions. Embodied carbon includes emissions caused by extraction, manufacture/processing, transportation and assembly of every product and element in an asset. In some cases, depending on the boundary of an assessment, it may also include the maintenance, replacement, deconstruction, disposal and end-of-life aspects of the materials and systems that make up the asset. Suitably authoritative carbon factor sources should be used in embodied carbon calculations, e.g. ICE Carbon Inventory, Environmental Product Declarations (EPDs), CESSM4, etc.</p>	<p>The level of evidence detail will depend on the phase of the project. At concept stage an estimate based on major project elements (e.g. steel, concrete, floor area, etc.) will suffice. As a bill of quantities develops, so will the embodied carbon estimate. Evidence will be in the form of a simple calculation with clear workings and assumptions that should be broadly as accurate as the associated cost estimate</p>
<b>2. How have embodied carbon emissions been minimised?</b>	
<p>A description of the techniques used to arrive at the embodied carbon figure.</p>	<p>Evidence could include referring to the carbon management process used (e.g. PAS 2080, RICS Whole Life Carbon Assessment for the Built Environment, BREEAM, etc.) and associated procurement mechanisms to minimise carbon. Evidence could also include the use of low carbon materials or construction techniques with associated estimated carbon savings. Circular economy contributions, including waste minimisation and materials re-use, should be included here.</p>
<b>3. What are the annual operational carbon emissions resulting from the project? (tonnes CO<sup>2</sup>e/year)</b>	
<p>Operational carbon emissions result from the operation of a built asset. This includes carbon emissions associated with heating, hot water, cooling, ventilation, and lighting systems, as well as those associated with cooking, equipment, and lifts (i.e. both regulated and unregulated energy uses).</p>	<p>Predicted or actual data should be provided in relation to energy use, using best practice carbon conversion factors, e.g. the BEIS Greenhouse Gas Reporting factors or local equivalents where relevant.</p>
<b>4. How have operational carbon emissions been minimised?</b>	
<p>A description of the techniques used to arrive at the operational carbon figure.</p>	<p>Evidence could include referring to the carbon management process used (e.g. PAS 2080, RICS Whole Life Carbon Assessment for the Built Environment, BREEAM, etc.). Evidence could also include the use of renewable energy technologies or low carbon heating systems.</p>

Definition	Evidence
<p><b>5. What are the estimated whole life carbon emissions resulting from the project over its design life? (tonnes CO<sup>2</sup>e)</b></p>	
<p>Whole life carbon is the sum of a project’s embodied carbon and operational carbon over a specified period, e.g. its design life or 60 years</p>	<p>Evidence would be a calculation showing the sum of the embodied and operational carbon values.</p>
<p><b>6. What whole life carbon savings are estimated compared to a ‘business as usual’ approach to project design and construction? (tonnes CO<sup>2</sup>e)</b></p>	
<p>Savings can only be demonstrated against a legitimate carbon baseline, i.e. what carbon emissions would have resulted from the project had active carbon reduction measures not been in place</p>	<p>Justification of the carbon resulting from the business as usual scenario, then a calculation showing the difference between this value and the project’s whole life carbon emissions.</p>
<p><b>7. How will the project become operationally net zero carbon by 2045?</b></p>	
<p>A net zero asset may be defined as one that achieves a level of energy performance in line with national climate change targets that does not burn fossil fuels and that is 100% powered by renewable energy. Net zero is essentially the achievement of a balance of zero greenhouse gas emissions by taking actions to remove the same quantity of greenhouse gases from the atmosphere as all of the activities under consideration generate.</p>	<p>Evidence could include an outline description of how the project will feasibly decarbonise over time, e.g. by introducing new renewable technologies or following electricity grid decarbonisation (if the asset is powered only by electricity). Potential barriers to achieving net zero (e.g. financial, technological, skills, etc.) should be highlighted here.</p>
<p><b>8. How has the project contributed to a more environmentally sustainable transport network?</b></p>	
<p>An important gauge in the environmental sustainability of a transport network is the carbon emissions it generates. Carbon emissions quantification usually requires traffic modelling, although this may not always be necessary, depending on the project.</p>	<p>Evidence will be project-dependent, from a qualitative description for negligible carbon impact projects, to quantification based on traffic modelling for potentially significant carbon impact projects (e.g. sizable roads projects).</p>
<p><b>9. Detail how the project has contributed to any other areas of environmental sustainability, e.g. mitigating pollution, dealing with contamination, enhancing biodiversity, etc.</b></p>	
<p>Environmental sustainability here is distinct from social or economic sustainability, which are covered by separate outputs.</p>	<p>Summary bullet points will suffice here. Evidence could include reference to an Environmental Impact Assessment (EIA) report or BREEAM certification if available. Other contributions towards environmental sustainability should also be highlighted here.</p>

## Appendix B

### Tay Cities Region Deal Change Control Process

When a Project or Partnership identifies a potential project change, the project should provide information to the PMO to be forwarded to both the Thematic Board and Governments for review and comment. This will confirm if a change request is required from the project (See flow chart at Appendix A1).

Potential changes That could be identified by a project are those which would alter to any degree the terms of the agreements previously struck between UK and Scottish Governments and local partners. Such agreements are variously described within the terms of the Heads of Terms, the Full Deal, the terms of approved Business Cases, and the terms of the Grant Offer. For example, this could relate to scope, outputs or permanent underspend within a given financial year (See flow chart at Appendix A2).

If the potential change is a change within a project, then the project will complete a change request and provide to the PMO, who will forward to the Thematic Board and Governments for review and Comment.

Any feedback from the Thematic Board and Governments will be collate and presented to the Management Group for consideration along with the Change Request.

Where it is highlighted that a project is no longer considered viable or value for money, either by the project itself, or by the Partnership, then this should be reported to the PMO to initiate discussion with Governments. This would involve a discussion around the parameters of any replacement projects that could be brought forward by the partnership and would take account of the strategic priorities of both the Governments and Partnership at the time (See flow chart at Appendix A3).

Based on the parameters agreed with the Governments, the appropriate Thematic Board will be asked to review and propose alternative projects. Noting that the Governments may also suggest a replacement project.

The PMO and Governments will discuss and agree a proposed approach based on the recommendation from the Thematic Board, and will be subject to ministerial approval.

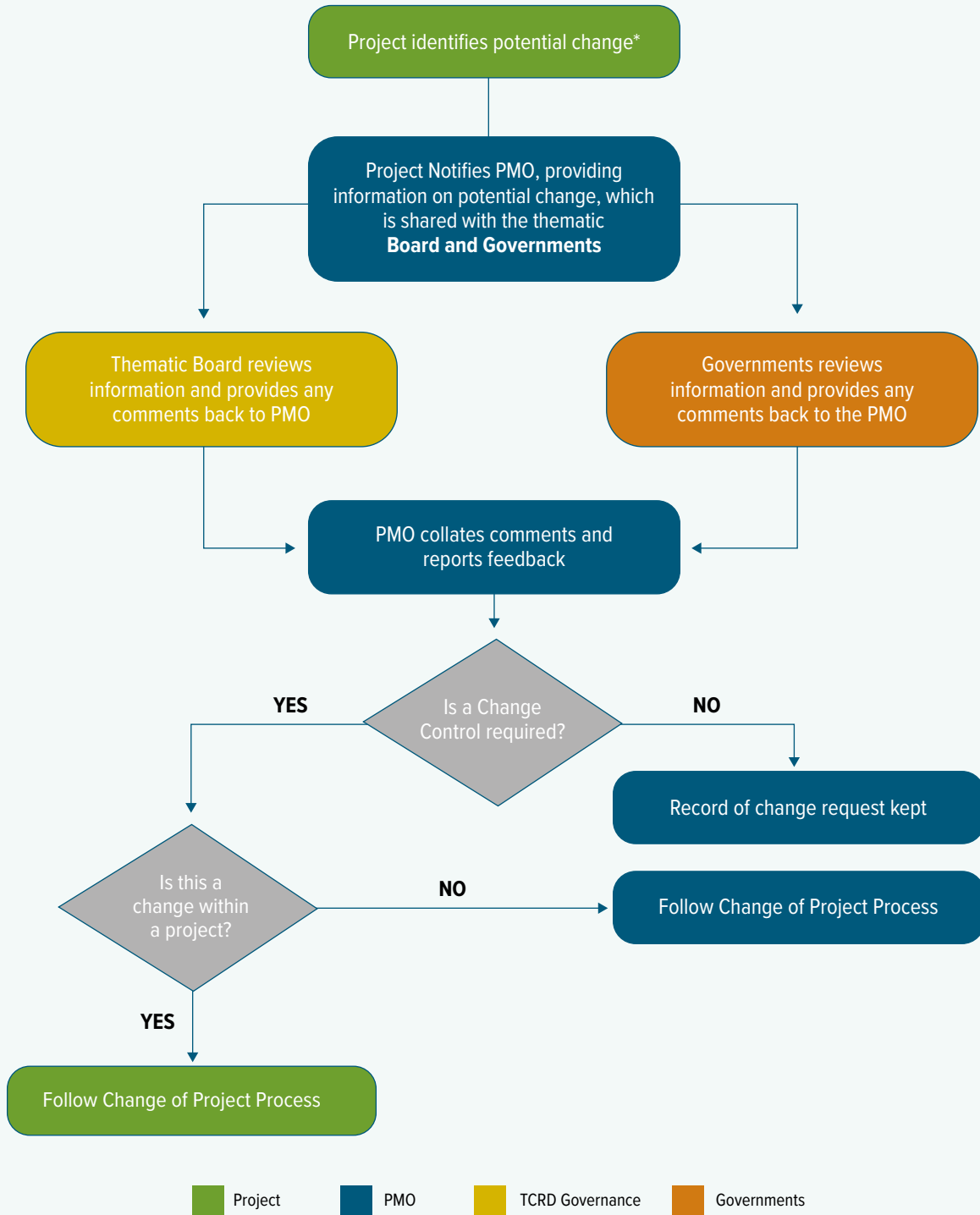
Following ministerial approval, the proposed replacement project(s) will then be presented to Management Group and Joint Committee for discussion and approval.

A change Log will be used to capture any potential project changes and the outcomes of any submitted Change Request.

It is recommended that the Change Control Process is reviewed annually to ensure that it is still fit for purpose.

Appendix A1

**Confirming Change Control Required**

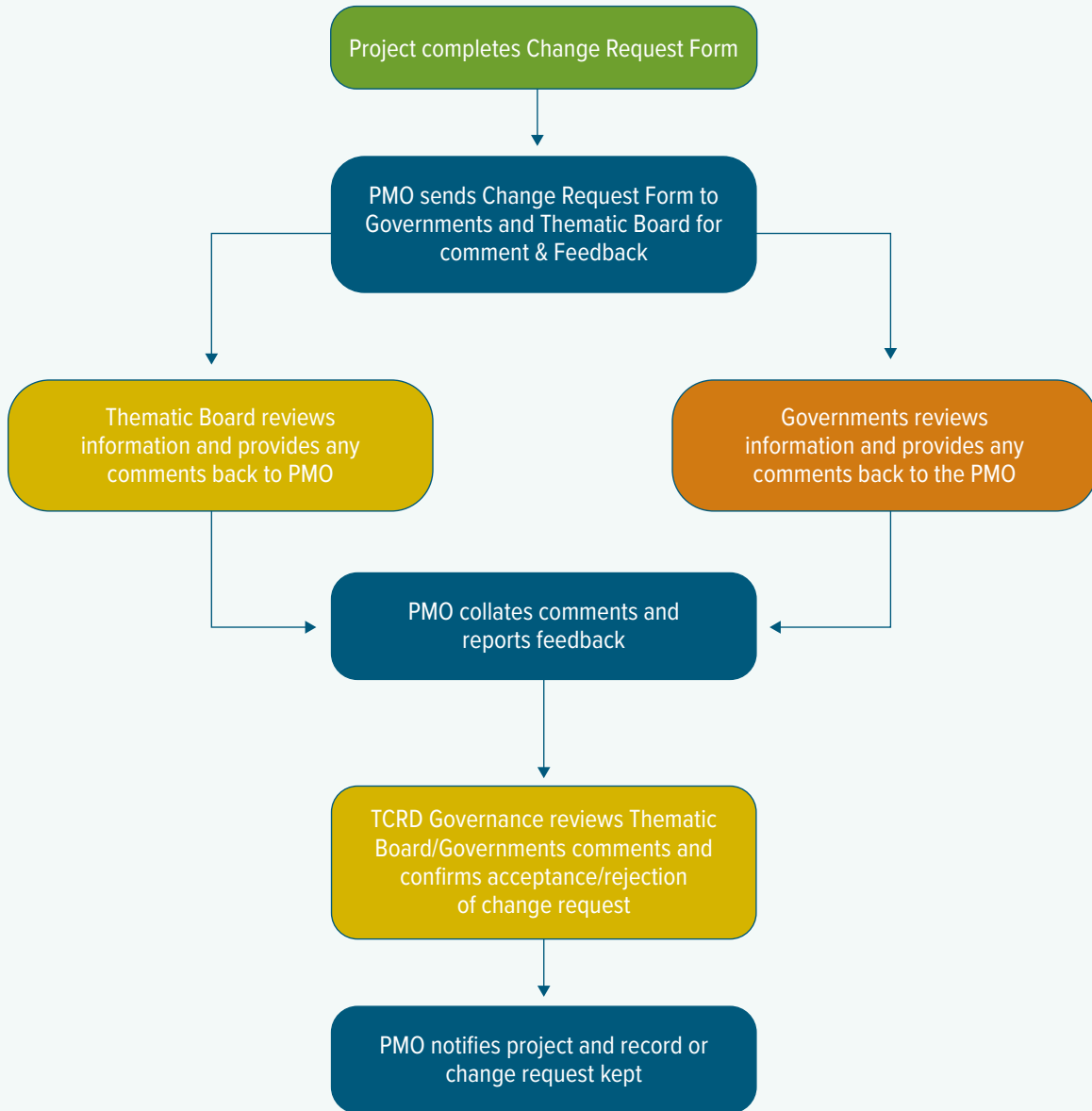


\*Change to Business case, including change to scope, outputs etc



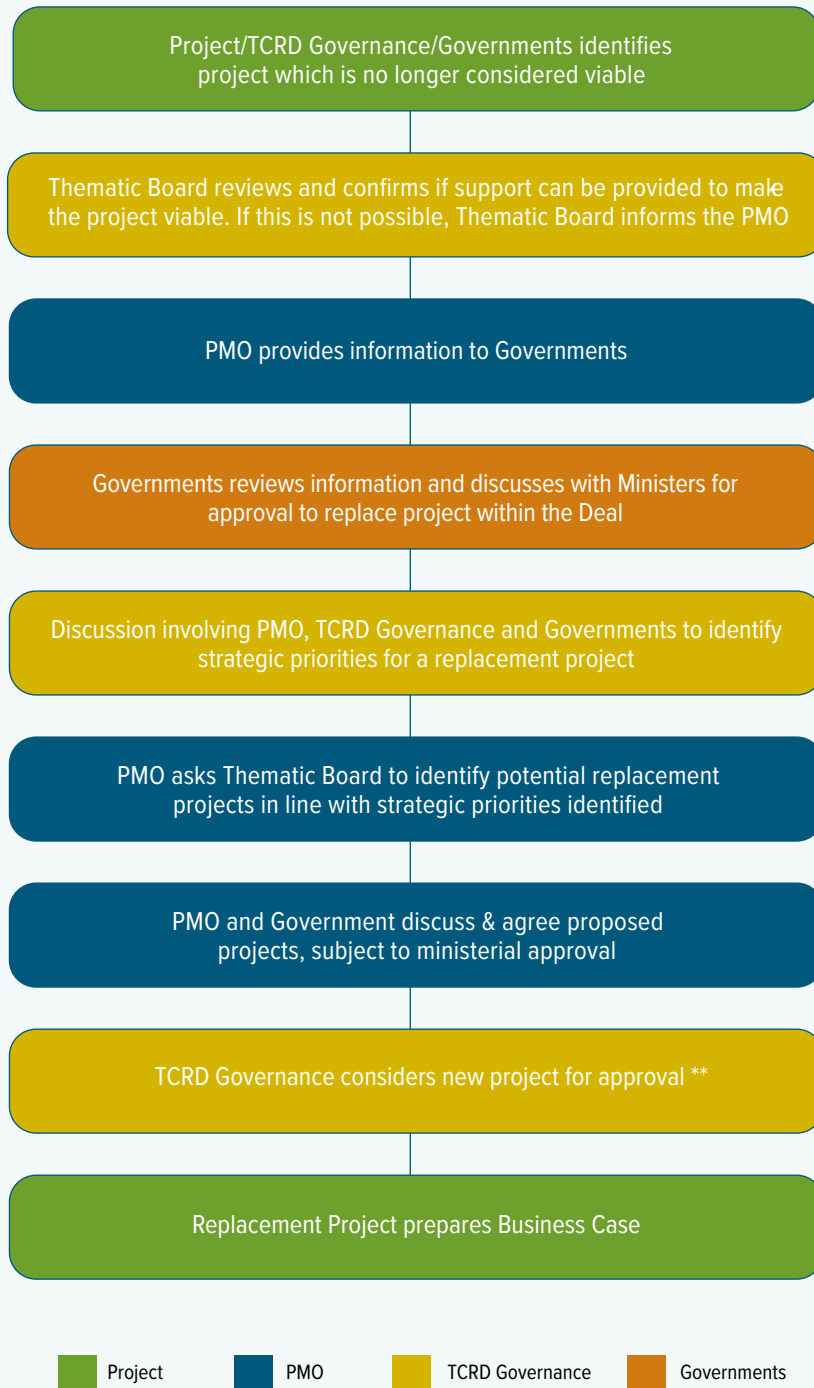
Appendix A2

### Change Within Projects



Appendix A3

**Change of Project**



\*This may be a result of internal/external changes, or a change request being rejected by Governments and TCRD Partnership

\*\* If TCRD Governance does not approve replacement project, then the Thematic Board will be asked to reconsider potential replacement projects

## Appendix C

### Reporting Template

The Benefits Realisation reporting template should be complete in Q2 annually with the Quarterly Report.



TCRD BRP Reporting  
Template blank.xlsx

The following guidance note will support Programme, Fund and Project Owners to provide benefits updates.



Benefits Realisation  
Reporting Guidance N

18 April 2024  
Agenda Item No. 7

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## 2023/24 Revenue Monitoring Projected Outturn – Planning Service, Business and Employability Service

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to give members an update on the projected outturn financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### Recommendations

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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There are no direct legal implications arising from this report.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 The purpose of this report is to advise Members of the projected outturn for the Executive Director, Planning, and Business and Employability Services, for the 2023-24 Revenue Budget, and to highlight the major variances as at December 2023. This is the fourth monitoring report to the Scrutiny Committee for the 2023-24 financial year.
- 1.2 The preparation of the 2023-24 Revenue Budget focussed on applying service underspends, budget realignment and vacancy factors to close the budget gap, and as such no specific savings proposals were approved by the Council as part of the Revenue Budget. There is therefore no requirement to include a Savings Tracker as part of financial reporting for the 2023-24 financial year.

## 2.0 Issues

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### 2.1 Projected Outturn

- 2.1.1 There is no projected variance for the areas falling under the scope of this committee. A summary of the 2023/24 projected out-turn for the areas under the scope of this committee is detailed in Appendix 1. This shows projected expenditure against budget across the service headings within the Directorate. It should be noted that the balances are extracted from the ledger system and are shown as rounded thousands. This may mean that there are some rounding differences contained within the appendices, but these are immaterial values that do not impact on the overall financial position. The following paragraphs provide a brief explanation of the main areas where there are significant variances (+/-£0.250m) to budgets.

## 3.0 Major Variances

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- 3.1 There are no major variances to report as at December 2023.

## 4.0 Conclusions

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- 4.1 The projected outturn position for the areas under the scope of the Finance, Economy and Corporate Services Scrutiny Committee is on budget and no variances to report.

### List of Appendices

- 1 Projected Outturn 2023/24 Summary

### Background Papers - None

#### Report Contact

Ashleigh Allan  
Finance Business Partner  
Finance Service  
Email: [Ashleigh.allan@fife.gov.uk](mailto:Ashleigh.allan@fife.gov.uk)

<b>BUDGET MONITORING REPORT SUMMARY FINANCE, ECONOMY &amp; CORPORATE SERVICES December 2023</b>					<b>Appendix 1</b>	
<b>PLACE DIRECTORATE</b>	<b>CURRENT BUDGET 2023-24 £m</b>	<b>FORECAST 2023-24 £m</b>	<b>VARIANCE £m</b>	<b>VARIANCE %</b>	<b>PREVIOUS REPORTED VARIANCE £m</b>	<b>MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m</b>
<b>TOTAL COST OF SERVICES</b>	<b>32.254</b>	<b>31.783</b>	<b>(0.471)</b>	<b>-1.46%</b>	<b>(0.216)</b>	<b>(0.255)</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>23.808</b>	<b>23.808</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>8.446</b>	<b>7.975</b>	<b>(0.471)</b>	<b>-5.58%</b>	<b>(0.216)</b>	<b>(0.255)</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>						
EE EXECUTIVE DIRECTOR	0.460	0.329	(0.131)	-28.43%	(0.103)	(0.028)
PLANNING	1.455	1.278	(0.177)	-12.14%	(0.104)	(0.073)
BUSINESS & EMPLOYABILITY SERVICE	6.531	6.368	(0.164)	-2.50%	(0.010)	(0.154)
	<b>8.446</b>	<b>7.975</b>	<b>(0.471)</b>	<b>-5.58%</b>	<b>(0.216)</b>	<b>(0.255)</b>

18 April 2024  
Agenda Item No. 8

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## 2023/24 Capital Monitoring Projected Outturn – Business and Employability Service

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqIA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 This report summarises the projected capital outturn for the areas falling under the scope of this Committee for 2023/24. Projected expenditure is £12.966m, representing 81% of the approved capital programme for 2023/24.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1.000m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the projected expenditure against budget for each project, along with any associated income.

## 2.0 Issues, Achievements & Financial Performance

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### 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the areas under the scope of the Committee with an overall value of £1.000m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June, 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays has been considered as part of the review of the Capital Investment Plan.

### 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.

### 2.3 Financial Performance – 2023/24 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2023/24. The appendix shows a projected outturn of £12.966m against a Capital Investment plan of £16.031m, a spending level of 81%. The variance of (£3.065m) is slippage which relates to delays in delivery and projects are still expected to be delivered in full and within budget, albeit over a longer timeframe.
- 2.3.2 Appendix 2 also provides a summary of the projected outturn for each project for the financial year 2023/24 for capital income. The appendix shows a projected outturn of £9.843m against a capital income budget of £12.870m.
- 2.3.3 The reasons for significant variances (+/-£0.500m) are detailed in paragraph 2.4.



2.3.4 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

## **2.4 Significant Variances**

### **2.4.1 Regeneration, Town Centres – slippage of £0.596m**

The main reason for slippage is (£0.548m) at Inverkeithing Heritage Public Realm project due to delays from complex tenders at this site.

### **2.4.2 Place Based Investment Programme (PBIP) – slippage of £0.814m**

The PBIP projects which have slipped are ; Dunfermline’s city centre Gap Site development (£0.300m) due to delays in finalising designs in order to minimise revenue costs, Public Realm Leven Railway Station (£0.260m) awaiting consultation with Network Rail, Lochgelly Business Park Energy Efficiency (£0.210m) delayed due to available contractor resources and Kirkcaldy Esplanade (£0.250m) additional budget approved in June 2023 and funded works will be delivered in next financial year.

### **2.4.3 Industrial Investment Programme – slippage of (£0.865m)**

The main reason for slippage is delay at Fife Interchange North where a new contractor for groundworks was required and is now in place, resulting in slippage of (£0.824m). Further slippage of (£0.240m) is a result of delay at Glenrothes Flemington Road project where there had been difficulty in accessing third party premises and delayed responses to requests for information. These issues have been resolved and the project is progressing to the next stage. Underspend of (£0.138m) is a result of planned acquisition which will no longer go ahead this year and funds will be redirected to the final phase of the Fife Industrial Innovation Investment Programme, other underspend of (£0.071m) relates to lower than expected requirement for digital infrastructure across the programme. The slippage and underspend are offset by £0.519m advancement in development of new business units at Levenmouth to maximise external funding available in this financial year.

### **2.4.2 Industrial Investment Programme income – shortfall of £1.150m**

The Industrial Investment Programme is funded by Edinburgh & South East Scotland City Region Deal grant. The reduction in programme expenditure reported at paragraph 2.4.1 reduces the level of grant which can be claimed in this financial year, however, this does not reduce the overall funding to the programme and the shortfall will be recovered in future years.

## 3.0 Conclusions

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- 3.1 The total 2023/24 approved programme for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee is £16.031m. The projected level of expenditure is £12.966m, which represents 81% of the total programme, resulting in slippage of (£3.065m).
- 3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report

### Report Contact

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
 CAPITAL INVESTMENT PLAN 2023-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Fife Interchange Business Units - Phase 1 & 2	Inclusive Growth and Jobs	8.130	11.518	11.518	-	0.00%	Current Project	2024-25
John Smith Business Park Business Units	Inclusive Growth and Jobs	3.644	5.517	5.517	-	0.00%	Current Project	2026-27
<b>Total Major Projects over £5.000m</b>		<b>11.774</b>	<b>17.035</b>	<b>17.035</b>	<b>-</b>	<b>0.00%</b>		
Queensway Development Site	Inclusive Growth and Jobs	2.113	3.399	3.399	-	0.00%	Current Project	2023-24
Levenmouth Business Units - Phase 1	Inclusive Growth and Jobs	1.602	3.674	3.674	-	0.00%	Current Project	2023-24
Dalgety Bay Business Units - Phase 2	Inclusive Growth and Jobs	2.853	3.980	3.980	-	0.00%	Current Project	2023-24
Queensway Refurbishment	Inclusive Growth and Jobs	1.380	2.451	2.451	-	0.00%	Current Project	2024.25
Fife Interchange North Site Servicing	Inclusive Growth and Jobs	3.046	1.511	1.511	-	0.00%	Current Project	2024-25
Levenmouth Business Units - Phase 2	Inclusive Growth and Jobs	2.898	3.135	3.135	-	0.00%	Current Project	2025-26
Kirkcaldy Flexible Business Premises	Inclusive Growth and Jobs	1.686	1.686	1.686	-	0.00%	Future Project	2028-29
Kirkcaldy Esplanade Phase 3	Thriving Places	1.500	1.302	1.302	-	0.00%	Current Project	2023-24
SE Joint Venture - Fife Interchange South	Thriving Places	1.138	1.138	1.138	-	0.00%	Future Project	2024.25
Inverkeithing Built Heritage	Thriving Places	1.176	1.173	1.173	-	0.00%	Current Project	2024-25
<b>Total Major Projects over £1.000m</b>		<b>19.392</b>	<b>23.447</b>	<b>23.447</b>	<b>-</b>	<b>0.00%</b>		
<b>Total Major Projects</b>		<b>31.166</b>	<b>40.483</b>	<b>40.483</b>	<b>-</b>	<b>0.00%</b>		

FIFE COUNCIL  
FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
CAPITAL INVESTMENT PLAN 2023-33  
MONITORING REPORT 2023-24

Appendix 2

Expenditure	Current Budget £m	Actual to Date £m	Total Outturn £m	Variance £m	Outturn as % of Plan
Regeneration - Town Centres	2.533	1.653	1.937	(0.596)	76%
Regeneration - Other	0.173	0.008	0.173	-	100%
Business Premises Refurbishment Programme	0.594	0.065	0.500	(0.094)	84%
Growing the Economy	0.960	0.485	0.542	(0.418)	56%
Place Based Investment Programme	1.213	0.798	0.398	(0.814)	33%
Business Property Portfolio	0.128	-	0.006	(0.122)	4%
Site Servicing Rolling Programme	-	0.009	0.099	0.099	0%
Vacant/Derelict Land	0.906	0.596	0.906	-	100%
Industrial Investment Programme	9.259	5.604	8.394	(0.865)	91%
Business Portfolio Energy Efficiency	0.266	-	0.012	(0.254)	5%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>16.031</b>	<b>9.225</b>	<b>12.966</b>	<b>(3.065)</b>	<b>81%</b>
<b>TOTAL EXPENDITURE</b>	<b>16.031</b>	<b>9.225</b>	<b>12.966</b>	<b>(3.065)</b>	<b>81%</b>

Income	Current Budget £m	Actual to Date £m	Total Outturn £m	Variance £m	Outturn as % of Plan
Regeneration - Town Centres	(1.337)	(2.501)	(0.592)	0.746	44%
Regeneration - Other	(0.050)	(0.050)	(0.050)	-	100%
Business Premises Refurbishment Programme	(0.115)	(0.115)	(0.010)	0.105	9%
Growing the Economy	(0.272)	(0.018)	(0.272)	-	0%
Place Based Investment Programme	(1.832)	(1.465)	(0.806)	1.025	0%
Industrial Investment Programme	(8.368)	(2.263)	(7.217)	1.150	86%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>(12.870)</b>	<b>(7.223)</b>	<b>(9.843)</b>	<b>3.027</b>	<b>76%</b>
<b>TOTAL INCOME</b>	<b>(12.870)</b>	<b>(7.223)</b>	<b>(9.843)</b>	<b>3.027</b>	<b>76%</b>

18 April 2024  
Agenda Item No. 9

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## 2023/24 Revenue Monitoring Projected Outturn – Finance and Corporate Services

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to give members an update on the projected outturn financial position for 2023/24 for the Finance and Corporate Services Directorate.

### Recommendations

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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There are no direct legal implications arising from this report.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 The report summarises the projected outturn position for 2023/24, taking into account the actual expenditure incurred, and provides an explanation of the main budget variances at section 3. This is the last monitoring report to the Scrutiny Committee for the 2023-24 financial year.
- 1.2 The preparation of the 2023-24 Revenue Budget focussed on applying service underspends, budget realignment and vacancy factors to close the budget gap, and as such no specific savings proposals were approved by the Council as part of the Revenue Budget. There is therefore no requirement to include a Savings Tracker as part of financial reporting for the 2023-24 financial year.

## 2.0 Issues

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### 2.1 Projected Outturn

- 2.1.1 Based on current information for the Finance and Corporate Services Directorate, of a service managed net expenditure budget of £55.994m the position across all Services is a projected expenditure of £54.279m resulting in a projected net underspend of (£1.716m) (3.06%). This projected underspend includes COVID-19 financial pressures of £0.627m.
- 2.1.2 Also, within the Finance and Corporate Services Directorate, there is a net expenditure budget of £6.814m for Benefits & Council Tax and Miscellaneous Services which is currently forecasting an underspend of (£1.034m). This budget sits within the Directorate but is managed corporately. Therefore, the Services within Finance and Corporate Services do not have a direct influence on these budgets.

Within the net expenditure budget of £6.814m there is an expenditure budget of £88.052m, mainly for Housing Benefit (HB) payments and Empty Property Relief, and income targets of (£81.424m) which includes the corresponding HB subsidy claim and the eligible HB Administration Fee.

- 2.1.3 Appendix 1 shows projected expenditure against budget across the various Services within the Finance and Corporate Services Directorate. Section 3 provides a brief explanation of the main areas where there are significant variances (+/-£0.250m) between planned and projected expenditure and income across service managed budgets.

## 3.0 Major Variances

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- 3.1 Directorate position – Variance (£2.750m) underspend, Movement (£0.480m)
- 3.1.1 Directorate Service Managed position (£1.716m) underspend, Movement (£0.480m)

The COVID-19 pressures of £0.627m noted in paragraph 2.1.1 relate to home and remote working and additional staffing resources. These pressures are mainly within BTS and Human Resources.

The movement mainly relates to staff vacancies across the Directorate.

There are currently significant recruitment challenges in most areas across the Finance & Corporate Services Directorate. This is mainly due to internal appointments and the backfilling of those posts, as well as competing with the external marketplace. The level of staff turnover and vacancies will have an impact on levels of service. It will also mean a greater workload, and this will need to be managed to minimise the impact on existing staff.

Revenue & Commercial Services (£0.777m) underspend, Movement (£0.261m)

There is a projected underspend on staff costs of (£0.733m) within Revenue & Commercial Services. This underspend is due to higher than anticipated staff turnover and vacant posts, particularly in Business Support (£0.655m). Business Support are still facing significant challenges in respect of recruitment leading to a considerable number of vacancies. Recruitment exercises have not been fully successful when Business Support try to fill posts as the number and standard of applicants is low. The number of vacancies will have an impact on providing full support to Services.

The movement relates to an increase in staff turnover and non-filling of posts.

Human Resources (£0.866m) underspend, Movement (£0.299m)

There is a projected underspend on staff costs of (£1.063m). The main area of underspend relates to the Youth Investment Fund (£0.892m). This is a ring-fenced budget and any underspend will be carried forward to 2024-25. There has also been higher than anticipated staff turnover which has resulted in an underspend on staff costs of (£0.171m) which is offset by COVID pressures within HR relating to additional resources. There may be an impact on the level of service if the level of vacancies continue.

The movement relates to higher than anticipated staff turnover for posts funded from the Youth Investment Fund.

### 3.1.2 Benefits & Council Tax (£1.034m) underspend, Movement (£1.034m)

An underspend of £0.942m is anticipated on the Empty Property Relief (EPR) funding which was devolved by the Scottish Government this financial year. The underspend has been incorporated in setting the 2024-25 budget.

## 4.0 Conclusions

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- 4.1 The projected outturn position for the service managed budget within the Finance and Corporate Services Directorate is a net underspend of (£1.716m) (3.06%), which

includes COVID-19 financial pressures of £0.627m. Benefits & Council Tax and Miscellaneous Services are projecting an underspend of (£1.034m) (15.17%).

## **List of Appendices**

- 1 Projected Outturn 2023/24 Summary

## **Background Papers**

None

## **Report Contact**

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Finance Service  
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Glenrothes

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<b>BUDGET MONITORING REPORT SUMMARY FINANCE, ECONOMY &amp; CORPORATE SERVICES</b>					<b>Appendix 1</b>	
<b>FINANCE AND COPORATE SERVICES</b>	<b>CURRENT BUDGET 2023-24 £m</b>	<b>FORECAST 2023-24 £m</b>	<b>VARIANCE £m</b>	<b>VARIANCE %</b>	<b>PREVIOUS REPORTED VARIANCE £m</b>	<b>MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m</b>
<b>TOTAL COST OF SERVICES</b>	<b>73.897</b>	<b>71.148</b>	<b>(2.750)</b>	<b>-3.72%</b>	<b>(2.269)</b>	<b>(0.480)</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>11.089</b>	<b>11.089</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>62.808</b>	<b>60.058</b>	<b>(2.750)</b>	<b>-4.38%</b>	<b>(2.269)</b>	<b>(0.481)</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>						
FINANCE & CORPORATE SERVICES MANAGEMENT	1.814	1.819	0.005	0.25%	(0.030)	0.035
ASSESSORS SERVICE	2.132	2.042	(0.091)	-4.26%	(0.016)	(0.075)
FINANCE	3.984	3.764	(0.219)	-5.51%	(0.200)	(0.019)
REVENUE & COMMERCIAL SERVICES	17.033	16.256	(0.777)	-4.56%	(0.516)	(0.261)
HUMAN RESOURCES	7.274	6.408	(0.866)	-11.91%	(0.567)	(0.299)
BUSINESS TECHNOLOGY SOLUTIONS	19.394	19.589	0.195	1.01%	0.036	0.160
LEGAL & DEMOCRATIC SERVICES	4.364	4.402	0.038	0.87%	0.058	(0.020)
	55.994	54.279	(1.716)	-3.06%	(1.235)	(0.480)
BENEFITS & COUNCIL TAX	6.628	5.594	(1.034)	-15.60%	(1.034)	0.000
MISCELLANEOUS SERVICES	0.186	0.186	0.000	0.00%	0.000	0.000
	6.814	5.780	(1.034)	-15.17%	(1.034)	0.000
<b>FINANCE AND CORPORATE SERVICES</b>	<b>62.808</b>	<b>60.058</b>	<b>(2.750)</b>	<b>-4.38%</b>	<b>(2.269)</b>	<b>(0.480)</b>

18 April 2024  
Agenda Item No. 10

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## 2023/24 Capital Monitoring Projected Outturn – Finance and Corporate Services Directorate

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2023/24 financial year for the Finance and Corporate Services Directorate.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqIA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 This report summarises the projected capital outturn for the Finance and Corporate Services Directorate for 2023/24. At this stage, it is forecast that expenditure will be £3.032m against a budget of £3.089m, representing 98.1% of the approved capital programme for 2023-24.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the forecast expenditure against budget for each project. A brief explanation of any significant forecast variances is provided at section 2 within this report.

## 2.0 Issues, Achievements & Financial Performance

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### 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the Finance and Corporate Services Directorate with an overall value of £1m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays will be considered as part of the review of the Capital Investment Plan.

### 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.
- 2.2.2 There is one major project with a budget of over £1m for Finance and Corporate Services. This project relates to the Local Area Network (LAN) as detailed in Appendix 1. The total budget is £7.314m over the life of the project. The projected spend for this project is on budget.

### 2.3 Financial Performance – 2023/24 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2023/24.

2.3.2 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

2.3.3 There are no major variances within the current approved programme.

## 3.0 Conclusions

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3.1 The total 2023/24 approved programme for the Finance and Corporate Services Directorate is £3.089m, with a forecasted level of expenditure of £3.032m.

3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan, and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report

### Report Contact

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 FINANCE & CORPORATE SERVICES  
 CAPITAL INVESTMENT PLAN 2023-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Local Area Network	Maintaining Our Assets	7.200	7.314	7.314	-	0.00%	Current Project	2029-30
<b>Total Major Projects over £5.000m</b>		<b>7.200</b>	<b>7.314</b>	<b>7.314</b>	<b>-</b>	<b>0.00%</b>		

**FIFE COUNCIL  
FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
FINANCE & CORPORATE SERVICES  
CAPITAL INVESTMENT PLAN 2023-33  
MONITORING REPORT 2023-24**

**Appendix 2**

<b>Expenditure</b>	<b>Current Budget £m</b>	<b>Actual to Date £m</b>	<b>Total Outturn £m</b>	<b>Variance £m</b>	<b>Outturn as % of Plan</b>
ICT Programme	1.592	1.392	1.592	-	100%
BTS Capital	1.000	0.482	1.100	0.100	110%
BTS Rolling Programme	0.498	0.411	0.340	(0.158)	68%
<b>TOTAL FINANCE &amp; CORPORATE SERVICES</b>	<b>3.089</b>	<b>2.285</b>	<b>3.032</b>	<b>(0.058)</b>	<b>98.1%</b>

18 April 2024

Agenda Item No. 11

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## Finance, Economy and Corporate Services Scrutiny Committee Workplan

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**Report by:** Eileen Rowand, Executive Director Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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This report supports the Committee's consideration of the workplan for future meetings of the Committee.

### Recommendation(s)

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It is recommended that the Committee review the workplan and that members come forward with suggestions for areas of scrutiny.

### Resource Implications

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Committee should consider the resource implication for Council staff of any request for future reports.

### Legal & Risk Implications

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Committee should consider seeking inclusion of future items on the workplan by prioritising those which have the biggest impact and those which seek to deal with the highest level of risk.

### Impact Assessment

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None required for this paper.

### Consultation

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The purpose of the paper is to support the Committee's discussion and therefore no consultation is necessary.

## 1.0 Background

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- 1.1 Each Scrutiny Committee operates a workplan which contains items that fall under three broad headings: performance reporting, planning and improvement work. These items will often lead to reactive rather than proactive scrutiny. Discussion on the workplan agenda item will afford members the opportunity to shape, as a committee, the agenda with future items of business it wishes to review in more detail.

## 2.0 Conclusions

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- 2.1 The current workplan is included as Appendix one and should be reviewed by the committee to help inform scrutiny activity.

### List of Appendices

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1. Workplan

### Background Papers

The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act, 1973:-

None

### Report Contact

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<b>Finance, Economy and Corporate Services Scrutiny Committee of 13 June 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Planning Services Enforcement Performance Update Report	Planning	Alastair Hamilton	
Management of Developer Obligation Funds	Planning	Mary J Stewart	
Attendance Management - Update Report	Human Resources	Barbara Cooper	
Opportunities Fife	Business and Employability	Gordon Mole	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 29 August 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Asset Management Strategy 2023 – 2028	Property Services	Michael Ogorman	
Annual Health & Safety Report 2023-2024	Human Resources	Sharon McKenzie, Barbara Cooper	
Smart Place Approach - City of Dunfermline	Business and Employability	Morag Millar	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 21 November 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Annual Report - Business and Employability: Service Performance Report	Business and Employability	Peter Corbett	
Bad Debts 2023-2024	Finance and Corporate Services, Housing Services	Les Robertson, John Mills	
Enterprise & Environment Directorate: Business and	Planning, Business and Employability	Gordon Mole, Pam Ewen	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 21 November 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Employability and Planning Services Performance Report			
Business Gateway Fife Annual Report	Business and Employability	Pamela Stevenson	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 30 January 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Annual Procurement Report	Business and Employability	Caroline Macdonald	
Finance & Corporate Services Directorate Performance Report.	Finance and Corporate Services	Eileen Rowand	
Ethical Procurement	Finance and Corporate Services	Caroline Macdonald	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 27 March 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Annual Absence & Wellbeing Update	Human Resources	Barbara Cooper, Sharon McKenzie	
Tay Cities Deal - Annual Report	Business and Employability	Morag Millar	
Annual Report - Edinburgh and South East Scotland City Region Deal	Business and Employability	Morag Millar	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 5 June 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Management of Developer Obligation Funds		Mary J Stewart	

<b>Unallocated</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Vacant Property Update	Property Services	Michael Ogorman	
Review of Community Council Elections	Democratic Services	Lindsay Thomson	
report on support and services for elected members	Finance and Corporate Services	Lindsay Thomson	