

Moray 2023 “Ten Year Plan Outcome Measures August 2015

The following document relates to 10 charts that are included in Moray 2023 “The Ten Year Plan” adopted by the Moray Community Planning Partnership to guide partner activities between now and 2023. The ten charts provide indicative measures to track the health of the local economy. Responsibility to progress activities that will have a positive impact on these measures has been assigned to the Moray Economic Partnership by the Community Planning Board. For each chart the document sets out the current status of the measures against a 2023 target with some commentary. It also identifies what the partners in the economic partnership are doing that would have a bearing on these measures and reaching the targets.

Notes

1: The Partnership has agreed to review the following measures every 6 months.

2: There are targets in other parts of Moray 2023 such as the availability of affordable housing that are not the responsibility of the economic partnership but which will have a bearing on the economic growth and diversification.

3: The resources needed to deliver the outcomes assigned to the MEP will be kept under review.

4. The measures included in Moray 2023 are not comprehensive and were originally selected because of the availability of that data to monitor. The Moray Council (TMC) has entered a contract with UHI Economic Research Intelligence Unit to provide datasets & bespoke research/analysis for TMC/MEP. UHI is close to signing up HIE & all LAs in the H&I area to provide uniform datasets for the region. The first publication is should be Autumn 2015. It is expected that this data set will provide more useful insight into the health of the Moray economy and be used as a basis to question the health of the economy and help shape actions to address any apparent weakness.

For more useful information Highlands and Island Enterprise published the [Moray Area Economic Profile 2014](#)

In December 2014 Skills Development Scotland Published a [Moray Skills Profile](#) This is a factual document which provides analysis of skills issues in Moray

Outcome Measure	Status August 2015
Section 1 MEP Measures from 10 Year Plan	

Chart 1 - Status August 2015

Chart 01 – % Rate as Good Place to live - Measure – grow from 66% to 72%. Source- Scottish Neighbourhood Statistics (Scottish Household Survey)	2012 – 66%
<p>Biennial Measure published by Scottish Government – In June 2014 the CPP agreed to take overall responsibility for this measure- influence goes beyond MEP area of responsibility</p> <p>Local Authority level analyses published biennially. Next LA publication due August 2015 (for 2014) http://www.scotland.gov.uk/Topics/Statistics/16002</p>	

Chart 2 - Status August 2015

Chart 02 – Population Growth - Measure – grow from 93,000 to 97,000 Source- Census & Mid-Year Estimates	2011 Census 93,295 in 2011, an increase of 7.3 per cent from 2001.																																								
Supplementary info provided for context: Components of population change for Council areas: mid-2004 to mid-2014																																									
	<p>How we want to see our Population grow</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Population</th> </tr> </thead> <tbody> <tr> <td>2011</td> <td>93,000</td> </tr> <tr> <td>2014</td> <td>94,750</td> </tr> <tr> <td>Amended 2016</td> <td>95,000</td> </tr> <tr> <td>2020</td> <td>96,000</td> </tr> <tr> <td>2023</td> <td>97,000</td> </tr> </tbody> </table> <p>2014 mid-year estimate 94,750</p>	Year	Population	2011	93,000	2014	94,750	Amended 2016	95,000	2020	96,000	2023	97,000																												
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Renfrewshire	-0.2	1.8	1.6
East Ayrshire	-0.4	2.0	1.6
Eilean Siar	-4.3	6.5	2.3
East Renfrewshire	0.2	2.7	2.9
South Lanarkshire	0.4	2.8	3.2
Dundee City	0.1	3.5	3.6
North Lanarkshire	1.6	2.2	3.9
Fife	0.7	3.3	4.0
Scottish Borders	-1.3	5.5	4.2
Shetland Islands	2.3	2.9	5.2
Clackmannanshire	1.7	3.4	5.2
Glasgow City	1.0	4.3	5.3
Stirling	0.1	5.3	5.4
Angus	-1.2	7.1	5.9
Moray	-0.1	6.1	6.0
Falkirk	1.6	4.7	6.3
Midlothian	1.8	5.6	7.5
West Lothian	4.5	3.8	8.3
Highland	0.0	8.7	8.6
Perth & Kinross	-1.3	10.1	8.8
Orkney Islands	-1.2	10.1	8.9
Aberdeen City	1.8	8.4	10.2
Edinburgh, City of	2.3	8.2	10.5
East Lothian	0.7	10.0	10.7
Aberdeenshire	2.2	8.8	11.0

The 2014 mid-year estimate published by the National Registers of Scotland exceeds the original population target for 2016 of 94,667 that is included in the 2023 Plan. Given this and the partnerships uncertainty over the impact of the current changes to employment in the oil and gas sector, it recommends an amended population target of 95,000 for the 2016 milestone of the 2023 plan.

Footnotes

This is table 10 from Mid-Year Estimates dataset

1) Change per 100 population. The underlying data used to produce these figures can be found in Table 6 of this publication.

2) Ordered by percentage population change.

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National Registers of Scotland annual measure published June *

<http://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates>

What are the partners doing that contribute to addressing the 2023 outcome target? (Updates in bold)

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 02 – Population Growth - Measure – grow from 93,000 to 97,000 Source- Census & In Year Estimates Relevant Plans & Strategies: Housing Strategy, the Moray Local Development Plan, the Regional Skills Investment Plan					3
A growing and economically active population	Job creation	Within HIE annual budget £3.5m, TMC match for employability, programme £80,000 (total over 3 years) funds also from SG & EU		<p>Job Creation – measured by HIE on annual basis, target 150 jobs p.a.</p> <p>Jobs created /retained by HIE are 174 2013/14. 160 2014/15.</p> <p>NB: 2015/16 will be challenging to achieve as current business projects are not necessarily on job creation</p> <p>TMC Participate in employability programme(s) Proposal developed June 2015 for Strategic Intervention – Partners UHI, One Parent Family Scotland & Social Enterprise Academy- Commence 2016 to help approx 800 individuals</p>	
	Marketing of Moray as a place to do business	c£50k p.a. within HIE budget MEP proactive communications including marketing - £35 p.a.until 2015,	Buckie Harbour, Enterprise Park Forres, Proposed Barmuckity Business Park as key	<p>Proposition development Targeted inward investors</p> <p>Articles for media, Moray Christmas Campaign</p>	

		£8k 2014-15 All Energy + 1 event	infrastructure	Joint event stand & brochure(s) with HIE	
Retention/Attraction of young people		What is Moray College budget? SDS spend on MA's ?	Alexander Graham Bell Centre Moray College now recruited further marketing resource	Tailored courses for young people meeting needs of business. Modern apprentice take up Actions from Developing Scotland's Young Workforce, Foundation apprenticeships [2016] and the establishment of the Invest in Young People group for Moray.	
				Work with Armed Forces to maintain a long-term presence and maximise the economic impact of that presence to help grow the economy and retain skilled work force when it leaves the services	
Facilitate Development				Including but not limited to: Buckie Harbour, March Road Buckie, OPP1 Greens of Rothes, Elgin Business Park, Enterprise Park Forres, IndustrialEstate remodelling Lossie Green, College Campus, Student Accomodation, Arts Centre, Housng Sites	
Curriculum development UHI at FE/HE Level			Moray College		

Chart 3 - Status August 2015

Chart 03 - Median Wage – Measure from £453.40 per week to £610.66, i.e. in line with Scottish average – Source ASHE (Annual Survey of Hours & Earnings)

Supplementary info provided for context:

Earnings by Workplace

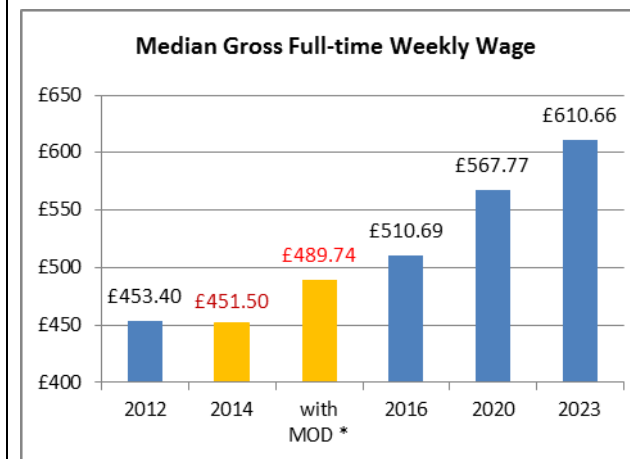
Median earnings in pounds for employees working in the area.

	Moray	Scotland	UK
2010	418.7	488.0	500.3
2011	455.6	485.0	500.0
2012	453.4	497.7	507.9
2013	465.8	508.7	517.6
2014	451.5	519.4	520.2

Earnings by Residence

Median earnings in pounds for employees living in the area

	Moray	Scotland	UK
2010	428.7	486.6	501.7
2011	466.0	487.2	500.2
2012	442.4	498.3	508.3
2013	444.0	507.9	517.9
2014	434.3	518.2	520.8



*NB £489.74 is the “mean” wage adjusted to include MOD employment in Moray.

Annual measure - Next Update Dec 2015 (2015 data)
Source Office of National Statistics (ONS) Nomis official labour market statistics
<http://www.nomisweb.co.uk/>

What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

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Chart 03 – Median Wage – Measure from £453.40 per week to £610.66, i.e. in line with Scottish average – Source ASHE					2
Relevant Plans & Strategies: HIE Operating Plan, Tourism Strategy					

Increase average wage to strengthen and diversify economy	UHI research intelligence unit commissioned to get better analysis of true average wage incorporating military and self employed	TMC £5,000 for next 3 years	UHI research intelligence unit, HIE economic analysts	Assess realism of target Research undertaken indicates that with inclusion of military average wage would rise by c10%
	Focus job creation on high value jobs, i.e. technology, life sciences	Part of HIE annual budget		Account management of key businesses in region Average salary of jobs created/retained in 2014/15 was £27,000, c15% higher than Moray average
	Maintain presence of key businesses in area	Part of HIE annual budget	Partner staff & accomodation, Grampian Food Forum, Energy North, Scottish Council for Development & Industry (SCDI), Moray Strategic Business Forum	Account management of key businesses in region Partners hold engagements with key sectors for growth & diversification (food & drink, engineering for energy, tourism, life science, business processes)
	Facilitate Tourism Development	HIE budget funding support HIE, TMC & VisitScotland, CNPA	Chamber of Commerce	HIE assistance for 5 star tourist accomodation Facilitate investment & development in hotel & accomodation provision in appropriate locations Pull together tourism stakeholders to

				<p>collaborate & improve Moray tourism offer & experience</p> <p>Facilitate visitor events(decide how many, how big and how often)</p> <p>Facilitate visitor orientation (decide what's needed (electronic,manned?) where and how best to facilitate)</p> <p>Collect and monitor tourism data, develop a performance measure(s). Use of existing STEAM (Tourism Economic Impact Model) data may suffice</p>	
	Raising skills levels		<p>UHI/TMC Education, SDS, MEP Skills & Training Group & Employability Action Group</p> <p>Alexander Graham Bell Centre for Digital Health.</p> <p>North Hub for Scotland's Food and Drink Academy</p>	<p>Actions from the local response to the Regional Skills Investment Plan</p> <p>Increased Higher Education places being bid for through EU funding.</p> <p>Higher level MA's and increased employer engagement in education and learning through the Developing Scotland's Young Workforce</p> <p>World Host</p>	

Chart 4 - Status August 2015

Chart 04 - % workforce in private sector - Measure – grow from 73% to 75% p.a. Source- ONS – Business Register & Employment Survey Table 5 Local Authority County (provisional)

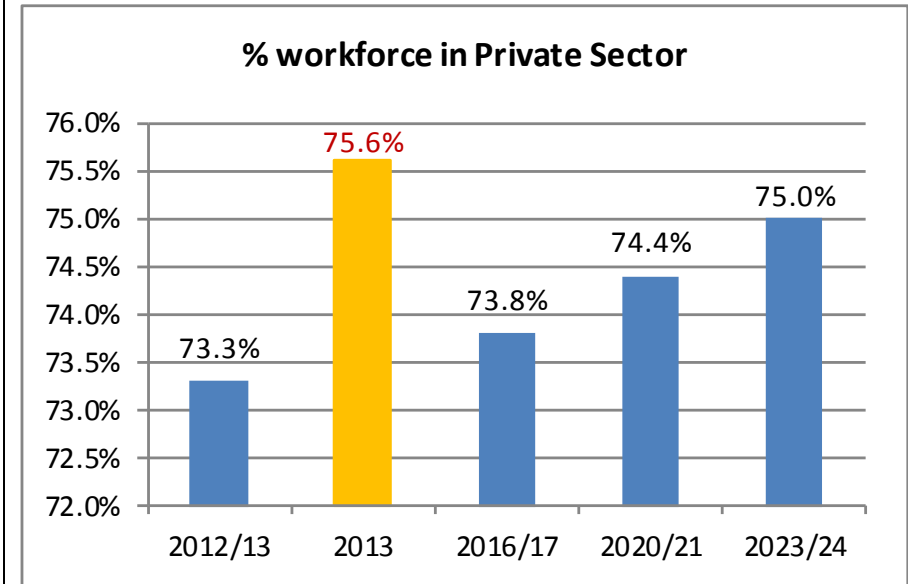
74.5% 2012 NB revised figure which had been shown as 73.3%

75.6% 2013

<http://www.ons.gov.uk/ons/datasets-and-tables/index.html>

<http://www.ons.gov.uk/ons/rel/bus-register/business-register-employment-survey/2013-provisional/stb-bres-2013-p.html>

Published Annually, next release for 2014 due September 2015.
Data used to calculate percentage is total employees



What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

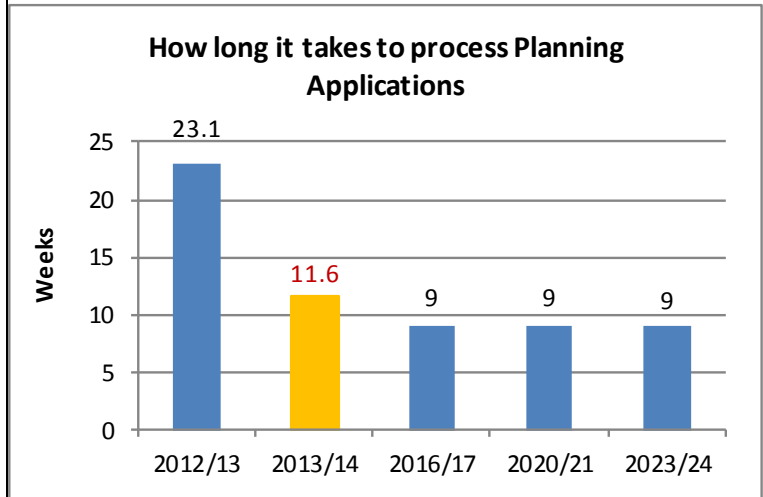
Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 04 - % workforce in private sector - Measure – grow from 73% to 75% p.a. Source- ONS – Annual Employment Survey Table 5					4
Reduce reliance on public sector and armed forces	Employment numbers, Council, NHS, UHI and military (UK & Scottish Govt)		UHI research intelligence unit, HIE economic analysts (may need help from CPP Research Intelligence Officers {RIOs} to collect data)	<p>Objective is to reduce dependency of local economy on the Public Sector for income. More work needed to understand the relationship between the MOD bases and service sector, also the value of migratory workers.</p> <p>It would help to monitor the numbers of people employed by the larger public sector employers in Moray, Moray Council, NHS & MOD to assess achievability of this target.</p>	
	HIE Account management			Grow employee numbers in business (see population growth sections)	
	Inward investors, HIE, Council through new companies in the area Inward invest through Alexander Graham Bell			New companies to area over last 3 years include, Atos, (c80 employees), EFC Group, (c40) and Jerky Group, (c40)	

	Centre				
	Buildings at Enterprise Park Forres (EPF) to attract new Research & Development				4 units currently vacant at EPF, following closure of Accunostics. Anticipated that 2 will be let this year, although unlikely to be R&D companies
	Scottish Property System utilised to support enquiries				Scheme no longer exists , although similar powers, are still available
	Operations & Maintenance (O&M) opportunity at Buckie				Discussions led by Moray Council with EDPR are keeping the profile of this opportunity high. TMC and HIE work closely in partnership
	Facilitate Development				See Chart 2
	Increase Social Enterprise		TSi Moray		
	Increase availability of skills and training				Providing accommodation at AGBC for life science start-ups Care Academy - Foundation apprenticeships in care. Development of the Science, Technology, Engineering & Mathematics (STEM) agenda. Northern Hub for Scotland Food and Drink Academy. Foundation apprenticeships and DSYW and Foundation apprenticeships Increase in Higher Education Curriculum

Chart 5- Status August 2015

Chart 05 – How long it takes to process planning applications - Measure – reduce from 23.1 weeks to 9.0 weeks Source – Audit Scotland /Moray Council Development Services

2013-14 861 decisions, average time 11.6 weeks
Published by SG on 24th July 2014.



Next Annual update end July 2015 for 2014-15. Quarterly updates published throughout the year
Data available from
<http://www.scotland.gov.uk/Topics/Statistics/Browse/Planning/Publications/planapps2014annual>

What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
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Chart 05 – How long it takes to process planning applications - Measure – reduce from 23.1 weeks to 9.0 weeks Source – Audit Scotland /Moray Council Development Services					4
Presents an impression to private sector that Moray is open for business	Moray Council Planning Dept		TMC & CNPA staff	Review staff resource to match resource to level of planning applications	
	CNPA for application in the National Park				
				Monitor volume of planning applications and the investment value of approved developments	

Chart 6- Status August 2015

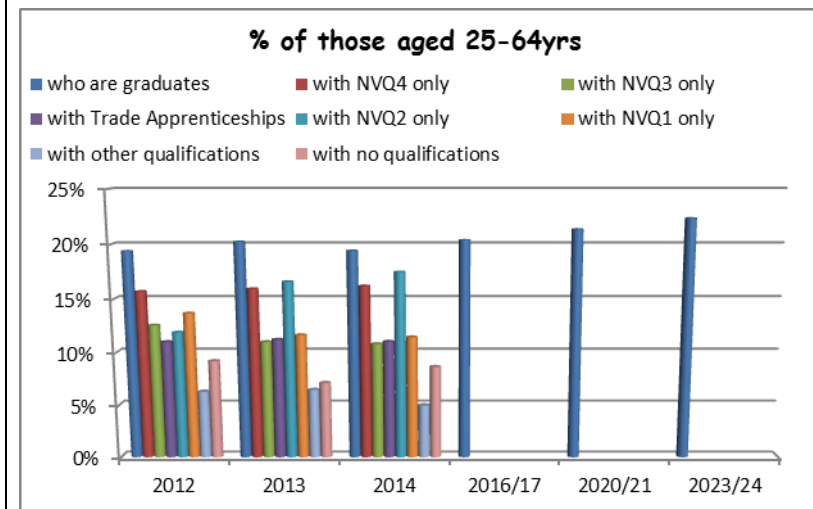
Chart 6 % of those in employment who are graduates or are with other qualifications. Source - SG [Local Area Labour Markets in Scotland - Statistics from the Annual Population Survey](#)

Published annually in May

Annual Population Survey/Labour Force Survey and then Annual Population Survey Dec 2004 to Mar 2015. Go to <http://www.nomisweb.co.uk/>

NB Need to set targets

Original target was to grow % of graduates from 19.4% to 22.4%



	who are graduates	with NVQ4 only	with NVQ3 only	with Trade Apprenticeships	with NVQ2 only	with NVQ1 only	with other qualifications	with no qualifications
2012	19.4%	15.7%	12.6%	11.0%	11.9%	13.7%	6.3%	9.2%
2013	20.3%	15.9%	11.0%	11.2%	16.6%	11.6%	6.5%	7.1%
2014	19.4%	16.2%	10.8%	11.0%	17.5%	11.4%	5.0%	8.6%

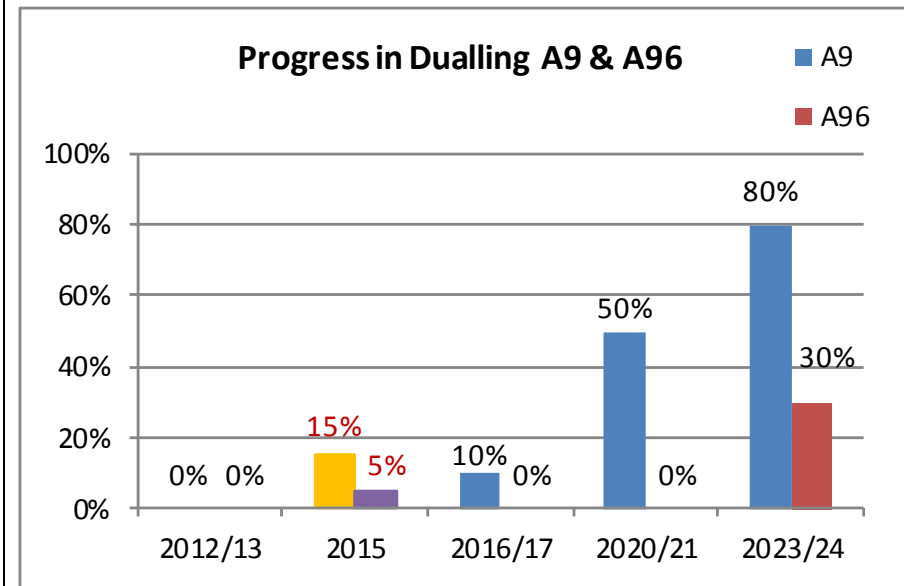
What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 06 - % of those in employment who are graduates or are with other qualifications. Source - SG Annual Population Survey Relevant Plans & Strategies: Curriculum for Excellence, Modern Apprenticeships, RSIP.					4
Higher and more appropriately skilled workforce	Moray College			Increase the Number of graduates p.a. residing locally	
	SDS – Skills programmes		Employability Action Group tsiMoray	Measure & monitor skills deficit, the difference between what Moray has got and what it needs for business to grow & diversify	
	Moray Council Schools			Collect & analyse skills, employability and employment data	
				Roll out World Host programme across Moray	
				Encourage and support business to employ Modern Apprentices	
				Certificate for Work Readiness	
			ESIF application to increase curriculum places at level 6 and above. ESIF Strategic Intervention application submitted for skills development. Career pathways through the Foundation Apprenticeship scheme. Invest in young people group to be established for Moray.		

Chart 7 - Status August 2015

Chart 07 – Progress in dualling A9 and A96 – Measure – grow to 80% A9 and 30% A96 – Source – Transport Scotland Road Projects

0% 2012-13



<http://www.transportscotland.gov.uk/road>

% for 2023/24 based on linear progress for completion 2025 (A9) and 2030 (A96)

What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 07 – Progress in dualling A9 and A96 – Measure – grow to 80% A9 and 30% A96 – Source – Transport Scotland					3
Moray better connected to key Scottish cities	HI Trans	TMC in kind contribution p.a. business community in kind contribution.	SCDI, Chamber of Commerce, Strategic Business Forum MC Direct Services	MEP has a Lobbying role Keep engaged with business to ensure progress & early implementation , engage with MP &MSP Work with neighboring authorities	
				Lobby for more better rail and air access	

Chart 8 - Status August 2015

Chart 08 - Business start-ups - Measure – grow from c 210 p.a. to 235 p.a. Source- Committee of Scottish Bankers

Data available from [Scottish Committee of Clearing Bankers](#) Next Update March 2015 (2014 year end data)

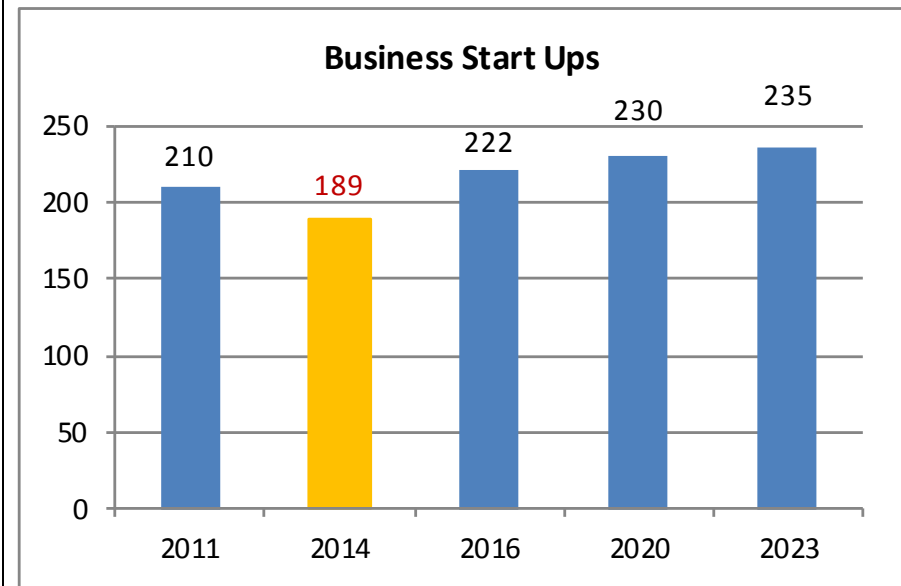
The Committee of Scottish Bankers COSB only collects data from those who bank with Scottish banks.

Change the source of data to ONS “business demography”

<http://www.ons.gov.uk/ons/rel/bus-register/business-demography/2013/rft-excel-tables.xls>

According to ONS in 2013 there were 215 start-ups in Moray

207 in 2011
190 in 2012
179 in 2013
189 in 2014



What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 08 - Business start-ups - Measure – grow from c 210 p.a. to 235 p.a. Source- Committee of Scottish Bankers					3
Moray seen as a place where you can be successful starting up your own business	Business Gateway Business Start Up (BSU) support targeting 120 start ups p.a.	£245k/pa	4 FTE's	BSU one to many workshops, One to one advice Business planning Compilation of BSU data BG target to help approx 120 start-ups/year	
	3-4 high growth starts , inward investors per year passed from BG to HIE for account managment	“	“	1 High growth start being currently account managed by HIE	
			PYBTS, tsiMoray, Chamber of Commerce, Moray College, Moray Council Education Service	Encourage Entrepreneurship e.g. UHI Scheme for Social Entrepreneurship, PYBTS young champions, tsi support for social enterprise, promote enterprise in schools & participate in Youth Enterprise Scotland. Career Academies, curriculum development and skills development	

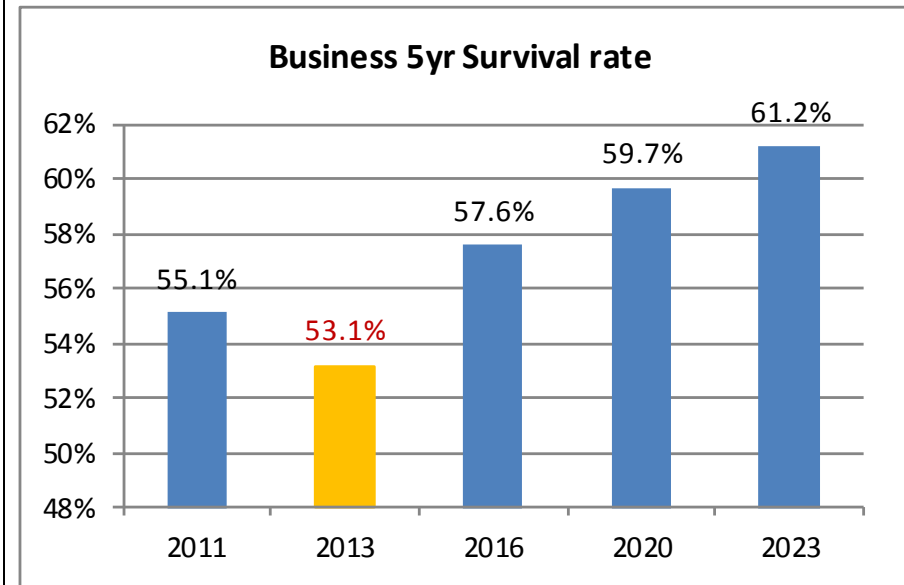
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Chart 9 - Status August 2015

Chart 09 - Business 5 Year survival rate - Measure – grow from 55% to 61% p.a. Source- ONS – “Business Demography” dataset

For comparability with local data from Business Gateway MEP plan to amend the scope of this measure to Business 3 Year survival rate.

55.1 % in 2011
 44.7% in 2012
 53.1% in 2013



<http://www.ons.gov.uk/ons/datasets-and-tables/index.html>
 Published annually in late Nov/early Dec. Search under “Business Demography”

What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 09 - Business 5 Year survival rate - Measure – grow from 55% to 61% p.a. Source- ONS – Business Demography??					3
Support in place to ensure that businesses survive, prosper and grow in the long run	Advice and support for SMEs	£245k/pa	4 FTE's Support from all partners	One to one advice and one to many workshops, business growth plans, facilitate engagement & networking. Existing targets for enquiries, young people, women in business & social enterprises, growth plans, workshops and numbers of growth business moved onto HIE Account Management e.g 12 growth plans and 10 SMEs into accountant management/year. Local Growth Plan 2015-16 to 2017/18 pending application for EU funding including specialist advice (access to finance and procurement), HR advisory service one to one sessions, growth workshops, collaborative local events, growth and leadership programmes, and key sector entrepreneurial support	
	Specialist advice			One to one advice and one to many workshops,	
	Marketing & PR of BG Services			Promotion of availability of advice and services	
	HR Recruitment Advice			One to one help for SMEs looking to recruit (consider as continuation as part of next SLA in 2015)	
	Move business into HIE Account Management via		SCDI, Moray SBF,	Harness MEP business forum and business advocates, Business Mentoring, Common Purpose Courses for CEOs	

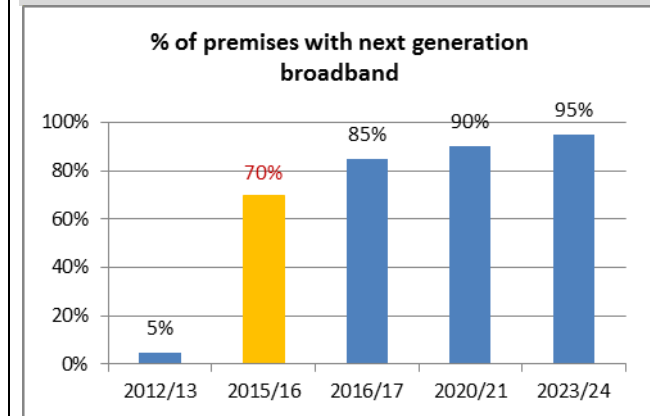
	growth plans		MCC, FSB		
	Supply of skills to meet employer needs and industry growth		UHI, SDS		

Chart 35 - Status August 2015

Chart 35 – Percentage of Households who have access to Next Generation Broadband. Measure – 95% by 2023 Source – Digital Rollout team - HIE Measure should be ‘Premises’ as opposed to ‘Households’ to incorporate

5% 2012-13

70% as of June 2015



Source, HIE Digital Web Page – Moray roll-out

Contact: Nick Scroggie NGB Project Compliance Manager - HIE Digital Team

What are the partners doing that contribute to addressing the 2023 outcome target? **(Updates in bold)**

Aim	Planned and Ongoing Services	Resources		What will the services do to contribute to achieving the target?	Confidence Level
		Annual Budget	Assets		
Chart 35 – Percentage of Premises that have access to Next Generation Broadband. Measure – 95% by 2023 Source – Digital Rollout team - HIE					3
Places Moray on a par or ahead of other regions	HIE Infrastructure rollout with BT	£10s of Million		Manage contract with BT, facilitate roll out helping to overcome technical or regulatory obstacles	
	Digital Engagement through HIE & Business Gateway to encourage take up amongst businesses			DigitalHi programme BG advisors & seminars	
	Tomintoul & Glenlivet Community Broadband Pilot		CNPA, Community Broadband Scotland	Facilitate NGB in remote rural locations Make this a priority of next Rural (Local) Development Strategy 2014-2020	