

SOUTH OF SCOTLAND RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME 2014 - 2016



South of Scotland
ALLIANCE

SOUTH OF SCOTLAND

RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME – 2014 – 2016

CONTENTS

INTRODUCTION	3
ECONOMIC CONTEXT	4
1. BORDERS RAILWAY / CENTRAL BORDERS BUSINESS PARK	7
2. MOUNTAIN BIKING – REFRESHING A WORLD-CLASS PRODUCT	11
3. ECONOMIC DEVELOPMENT STRATEGY FOR THE M74 CORRIDOR AREA	15
4. STRANRAER WATERFRONT	19
SCOTTISH ENTERPRISE STRATEGIC THEMES – RURAL FOCUS	23

SOUTH OF SCOTLAND ALLIANCE RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME – 2014 – 2016

AMBITIONS

The South of Scotland Alliance is a mature partnership between Scottish Borders Council (SBC), Dumfries and Galloway Council (DGC) and Scottish Enterprise (SE). The Alliance aims to raise the profile of the South of Scotland, the issues faced by our economy, and the positive role that we believe the area can play in Scotland's future.

This document sets out an ambitious proposal to develop the economy across the South of Scotland, aiming to match and complement the role of the 'city-regions' in supporting economic growth. We see some key opportunities in the near term that will facilitate this ambition.

We have developed our Rural Regional Economic Development Programme as a practical partnership response to enable national and local partners to work together to take these opportunities forward. We believe that the Programme is ambitious in the current institutional and financial context, and consider it is a starting point for new, larger strategic initiatives in future.

OPPORTUNITIES

A range of key opportunities has arisen, in themselves unique in terms of the economic history of the South of Scotland. Specifically, Superfast Broadband connectivity, the railway development in the Scottish Borders, developments along the M74 and A75 corridors in Dumfries and Galloway and Assisted Area Status. The intent of our Programme is to provide a basis for working together with the Scottish Government to maximise the full potential from these opportunities and investments.

The four projects included in this Programme are acknowledged regional priorities which, when brought together, represent a nationally significant economic development Programme for the South of Scotland. They would contribute significantly to the overall national economic ambitions outlined in the Scottish Government's strategy for growth.

SOUTH OF SCOTLAND ALLIANCE RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME – 2014 – 2016 ECONOMIC CONTEXT

Each area of Scotland has a varying mix of assets and potential in terms of people, skills, businesses, communities, organisations, infrastructure and services that can contribute to economic growth. In considering this economic context, there are continuing challenges faced by the South of Scotland in relation to significantly lower GDP per head, low wages and a difficult employment situation.

- GVA per head of population is significantly below the Scottish average - £13,524 against £20,013 (67.5% of Scottish average).
- Productivity is lower in the South of Scotland than the Scottish average – £30,889 against £43,095. It is still below pre-recession levels in real terms.
- Agriculture, forestry and fishing sector has the largest proportion of firms in the South, followed by retail and construction.
- VAT/PAYE registrations per 10,000 working population are below the Scottish average – 42 against 53.

Key characteristics of the South of Scotland economy and business base include:

- Structure (business size / business type) of regional economy leads to relatively low GVA per head and productivity.
- Significant lack of business growth - micro to small; small to medium; medium to big.
- Dependence on the primary sector (and therefore a major risk around CAP reform impact).
- Importance of food and drink products and tourism (specific market segments in each).
- Service sector driving Scottish growth, but under represented in the South.
- Slow development of the knowledge economy but opportunities to maximise the benefits of Higher Education assets.
- Niche “Products” – eg luxury textiles; specialist foods; heritage/cultural/ activity tourism.
- Ageing population and attractive retirement location.

DELIVERY

Support from Scottish Enterprise and other national agencies is required if the four projects are to be successfully delivered. We believe the projects align well with Scottish Enterprise's key priorities and shared vision for the role that rural economies can play in the national context. The Alliance recognises that Scottish Enterprise is not geographically focused, but the commitment of specialist expertise from all of the partners will be crucial if the proposed Programme is to be refined and successfully implemented to deliver additional economic impact.

The Alliance recognises that there will be a variety of approaches required for the different projects and that the local Community Planning Partnerships will ensure that development and delivery is aligned to Partners' agreed regional ambitions as outlined in respective Single Outcome Agreements.

OUTCOMES

The Programme has been developed to address our challenges through an 'opportunities' orientated approach that aims to deliver the following outcomes, as measured by specific indicators (in bold):

1. We want to bring new types of business into the South of Scotland – different sectors that can support resilience and sustainability for our economy. **No. of inward investments.**
2. We want to encourage our existing businesses to grow on the back of these opportunities – to maximise the local potential that hides under the surface. **No. of local businesses in growth pipeline and account management**
3. We want to expand our service sector - so that the economy is more diverse. **No. of businesses in key sectors.**
4. We want to bring in additional visitor spend and increase the number of bednights in the area – so that tourism businesses can grow and new private sector investment in tourism facilities and products is made. **Increase in visitor numbers, increase in visitor spend.**

5. We want to use the quality of life we have on offer to grow our working age populations to sustain our communities and local services for the long term. **Change in working age population.**
6. We want to close the GVA per head gap with the Scottish average. **Change in GVA per head.**

THE PROGRAMME

The Programme consists of four key strategic projects, primarily focused on 'capital' related activity. A fifth area for action is also identified that relates to some of the key themes that are at the heart of Scottish Enterprise's strategy.

The four strategic projects are:

- **Project 1 – Borders Railway / Central Borders Business Park**
- **Project 2 – Mountain Biking – Refreshing a World-Class Product**
- **Project 3 – Economic Development Strategy for the M74 Corridor Area**
- **Project 4 – Stranraer Waterfront**

These Projects will require significant financial support in order to deliver outcomes on the ground. The Alliance partners will be the main source of funding. It appears unlikely at present that EU funding will be available for these projects from the new Programmes.

In proposing this Programme we aim to demonstrate that our rural economy has projects and interventions of sufficient scale to be prioritised for investment by Scottish Enterprise. By focusing on our key opportunities we believe the approach demonstrates that the rural economy of the South of Scotland can make a significant contribution to the national economy.



photo credit: Network Rail

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PROJECT 1 – BORDERS RAILWAY / CENTRAL BORDERS BUSINESS PARK

In 2013 an 'Economic and Market Assessment' for new business space in the vicinity of the Borders Railway Terminal at Tweedbank was undertaken, delivered by Ironside Farrar Ltd on behalf of Scottish Borders Council and Scottish Enterprise.

The report's economic analysis highlights short term demand for new commercial office space to meet projected growth in the 'professional and business services' in central Borders over the next five years. This estimates demand for 450 m²-1,750 m² of new business space with between 180-350 new jobs created.

Over the medium to long term, a review of comparator projects identifies a range of positive impacts from railway investment on the economy. Benefits include access to employment, services, business relocations, positive changes to the population base, productivity and perceptions of the area. The report suggests over the medium to long term (up to 15 years) there could be demand for 5,000 m² to 12,000 m² new office floorspace, with the creation of 1,000 – 2,300 jobs.

The potential demand for high quality premises means Tweedbank would be a 'natural location for development and industry'. However, the report suggests that a severely restricted development investment market means uncertainty for delivery of business space without public sector intervention.

CENTRAL BORDERS BUSINESS PARK

The most effective way to deliver new employment land opportunities in this Central Borders location is to redevelop parts, or all, of the existing Tweedbank Industrial Estate. This area has been the key strategic industrial site in the Scottish Borders for decades and many of the properties in this area are now due for replacement or major renovation. Officers consider that the redevelopment of parts of this area may be significantly more cost effective than developing a similar area of greenfield land. It also has the key benefit of being adjacent to the railhead for the new Borders Railway. As an existing industrial area it also benefits from good existing services and a well-planned landscape setting.

The first steps in taking forward this part of the proposal would include acquisition of key parts of the existing industrial area from the private sector. This would facilitate the effective future planning and redevelopment of the area. A time-limited opportunity exists at the moment to acquire a key part of this area, so immediate progress is required on this issue. The medium to long term redevelopment of the area with modern, low carbon offices and business space would be achieved through sale or joint ventures with private sector developers. However, initially public ownership would help ensure the right type of development, design and layout for this key strategic business area. This is an opportunity to create a flagship development on an attractive, high amenity site.

INWARD INVESTMENT MARKETING

This is required to maximize the benefits of the Borders Railway. It would include marketing campaigns and familiarisation visits to promote the advantages of locating to the Scottish Borders. This would be delivered in partnership with SDI and city-region local authorities, building on 'Our Scottish Borders' and 'The Best Move of Your Life' brands. It would be focused on the exceptional quality of life the area has to offer, a skilled workforce, competitive costs, and good ICT and rail connectivity. We will work with SDI to ensure appropriate targeting and to build our understanding of the needs of potential inward investors.

PROJECT 1 - BORDERS RAILWAY / CENTRAL BORDERS BUSINESS PARK

	RESOURCE	LEAD (SUPPORT)	TARGET (ACTIVITY/OUTPUT)	TIMESCALE	OUTCOME MEASURED BY:	BENEFITS REALISED: OUTCOME (TO 2023) MEASURED BY:
Project 1 – Borders Railway / Central Borders Business Park						
Central Borders Business Park	£5M	SE / SBC	Development Appraisal. Design Vision and Technical Briefs. Site Purchase – public sector. Upgrading, demolitions and Phased Redevelopment – in partnership with Private Sector.	September 2016	Creation of high quality employment locations next to Tweedbank Station. Measured by: Hectares of business sites occupied. Number of business relocations.	There is new land and premises to encourage business to grow and relocate.
Inward Investment Marketing	Officer time £100,000	SBC / SE partnership	Number of marketing campaigns. Number of resulting enquiries.	September 2016	New business investment in Scottish Borders Railway corridor. Measured by: No. of business relocations. GVA/ jobs created.	New businesses are attracted to the Scottish Borders. The economic development potential of the Borders Railway is maximized.



SOUTH OF SCOTLAND ALLIANCE RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME – 2014 – 2016

PROJECT 2 – MOUNTAIN BIKING – REFRESHING A WORLD-CLASS PRODUCT

The South of Scotland has established a world-class reputation for Mountain Biking (MTB) through the 7stanes products, a range of mountain bike centres stretching across the region. The 7stanes is perfectly located for visitors from the central belt of Scotland, but also attracts significant numbers of visitors from the north of England and internationally. 7stanes, like other provision across Scotland, is facing increasing competition from across the rest of the UK as a result of significant recent investments in new or enhanced facilities.

Forestry Commission Scotland (FCS), and other partners, have invested over time in trails and more recently in high quality visitor facilities at a number of the sites. However, in order to continue to compete successfully in the growing mountain bike market, there is a pressing need for additional facilities that add to the biking experience and attract returners as well as new visitors. New investment is required to update the trails, ensure that new trails are regularly added and, most importantly, to deliver at least one high profile new facility that would be a UK-wide draw. Whilst FCS recognises the economic impact of investing in trails, resulting increased maintenance costs, and health and safety responsibilities (which

FCS has to finance from a shrinking resource allocation) act as a disincentive to significant investment. This is a policy area that requires Scottish Government assistance to overcome.

MOUNTAIN BIKE UPLIFT

The key proposal is to develop a visitor and outdoor activities centre near Innerleithen/Traquair as a complement to Glentress. This project is intended as an extension and complement to existing tourist attractions in the local area. The majority of the development will take place in Traquair Forest, a planted forest managed by FCS. Located just south of Innerleithen, the Traquair Forest is home to some of Britain's most popular mountain bike trails and currently plays host to regional, national and international events.

An uplift would provide an excellent opportunity to make mountain biking in the region more accessible and enable the area to host more international downhill championships (those that currently only use venues with uplift facilities). FCS plans for Glentress include a significant number of holiday lodges and this

facility would provide another attraction to encourage people to stay in the lodges as it would provide more variety and a wider range of experiences for the visitors. Without this new facility, or a similar type of high profile addition to refresh the mountain biking product, the South of Scotland will start to lose its profile and draw as a key mountain biking destination, especially for the markets in the north of England.

The uplift project that is proposed has the additional feature of an all-weather toboggan run adding a new tourist facility to the area and broadening its outdoors appeal. The success of this project would also encourage further investment in the town and surrounding area.

RESORT DEVELOPMENT

More than 300,000 visitors come to Glentress each year, the majority of whom are day visitors. The Tweed Valley is currently understocked with accommodation providers so an opportunity lies in accommodation investment. This may take the form of a Velotel (a cyclists hotel, or similar) in Innerleithen. However, there are also opportunities for bunkhouse/hostel accommodation, bed and breakfasts and self-catering facilities. If approved, FCS Glentress Masterplan will include 'Peel village', an arrival building, a main building and up to 90 cabins for accommodation. Additional parking, trailheads and routes are also being considered.

MOUNTAIN BIKING INNOVATION, SKILLS AND EDUCATION

Scottish Enterprise (supported by SportScotland and Edinburgh Napier University) are working to establish Glentress as a centre for Mountain Bike excellence. This would include a centre of academia, skills training and community learning similar to Snowpolis in Finland: www.snowpolis.fi/. There is also an opportunity to build on the Borders College BASE Mountain Biking course in order to attract more riders to the area and potentially encourage more MTB related business start-ups.

PROJECT 2 – MOUNTAIN BIKING – DEVELOPING A WORLD-CLASS PRODUCT

	RESOURCE	LEAD (SUPPORT)	TARGET (ACTIVITY/OUTPUT)	TIMESCALE	OUTCOME MEASURED BY:	BENEFITS REALISED: OUTCOME (TO 2023) MEASURED BY:
Project 2 – Mountain Biking – Developing a World-Class Product						
7stanes mountain biking network and Mountain Bike Uplift	£5.5M	FCS / SE / SBC Community/ SBC / SE partnership	Development Appraisal. Design Vision and Technical Briefs. Site / Product Development (phased) No. of MTB routes. Creation of new routes. Number of MTB attractions.	September 2016	New mountain biking products and experiences are developed. Measured by: No. of visitors. GVA/ jobs created.	Recreational, retail and cultural opportunities are maximised.
Tweed Valley resort development	£5M	Private sector/ Joint venture	Caerlee Mill redevelopment. Velotel (or similar) No. of bed spaces.	September 2016	New tourism business investment in the Tweed Valley. Measured by: No. of business relocations. GVA/ jobs created.	Activity is increased in key local sectors, including tourism and food and drink. New businesses are attracted to the Scottish Borders.



photo credit: Paul McLaughlin

SOUTH OF SCOTLAND ALLIANCE RURAL REGIONAL ECONOMIC DEVELOPMENT PROGRAMME – 2014 – 2016

PROJECT 3 – ECONOMIC DEVELOPMENT STRATEGY FOR THE M74 CORRIDOR AREA

The M74 corridor area within Dumfries and Galloway has been identified as a priority development zone. The context for this focus is the convergence of core connectivity infrastructure along the route of the motorway, set against the background of the closure and decommissioning of the former nuclear power station at Chapelcross near Annan, which is nearing its care and maintenance phase and will result in significant job losses from the local economy. SE and DGC officers have worked together to scope the basis for a commission to develop an Economic Strategy for the M74 Corridor.

PROJECT AREA

The study area broadly extends from Carlisle to Moffat following the line of the M6 / M74 motorway through the district of Annandale in Dumfries and Galloway. It should encompass an approximately 10 mile band east or west of the road route. The topography of the land area naturally creates a confluence of other national infrastructure assets, namely the West Coast Main Rail Line, the electrical National Grid main interconnector

between Scotland and England, gas and ethylene transmission pipelines, and the infrastructure belonging to several carrier class telecoms network operators. The region remains predominantly rural despite the presence of this connecting infrastructure, which largely conveys traffic and services between the conurbations of central Scotland and northern England. These conurbations represent a potential market of approximately 20m people within two hours travel time of the area.

THIS PROJECT AND ITS OBJECTIVES

As part of their remit to deliver sustainable economic development SE and DGC, the partners, wish to undertake a comprehensive study of the opportunities and challenges pertaining to the target development area. The principal aim of the study is to set the grounds and vision for maximising the economic development potential of the area over the 20 year time horizon of the new Local Development Plan (LDP).

To do this the study should encompass:

- A review of infrastructure assets within and at either end of the north-south corridor (including, for the avoidance of doubt, within the neighbouring local authority regions), and their capacity to support future development.
- A review of the existing industry base including the relative importance of key sectors and the strengths, weaknesses, opportunities and threats affecting the different sectors, also including cross boundary influences from neighbouring regions.
- Identification of existing market opportunities and potential new market or industry sector opportunities.
- For identified opportunities, consider commercial viability, achievability and quantify potential economic benefits (additional GVA, new jobs).
- Due consideration of the constraints on opportunities by projected demographic trends and conversely demographic changes needed to support achievement of anticipated economic development.

PROJECT OUTPUTS

A consolidated economic strategy and master plan, detailing the pathways to achievement of short, medium and longer term goals and opportunities identified through the study phases of the work.

The strategy will be based on the completion of the following:

- A Baseline Study.
- An investigation into Indigenous Industry Sectors Options, together with high level assessments of dependencies, anticipated investment required to achieve potential goals and the economic benefits realistically achievable.
- An investigation into potential New Industry Sectors Options for the region, also with high level assessments of dependencies, investment estimates, and economic benefits.
- Production of a holistic strategy collating the various, realistically achievable, opportunities identified into a coherent vision for the development of the M74 corridor over 5, 10 and 20 year time horizons.

PROJECT 3 – M74 CORRIDOR STRATEGIC DEVELOPMENT MASTERPLAN

	RESOURCE	LEAD (SUPPORT)	TARGET (ACTIVITY/OUTPUT)	TIMESCALE	OUTCOME MEASURED BY:	BENEFITS REALISED: OUTCOME (TO 2023) MEASURED BY:
Project 3 – M74 Corridor Strategic Development Masterplan						
Strategic Masterplan Study to evaluate collaborative development opportunities with partner regions.	£250k	DGC/ SE/ SG/ NDA/Carlisle and Cumbria councils	A quasi-Strategic Development Plan spanning the cross border region.	2014	Supplementary Planning guidance adoptable by the respective authorities.	Development proposals taken forward and inward investment.
Energy sector developments at Chapelcross and / or Eastriggs	Potentially £Millions	Private Sector	Transnational scale, Centre of Excellence in multiple sustainable energy Generation and Storage technologies.	2020	Installed generating and storage capacity.	Replace / exceed jobs lost from the decommissioned nuclear facility at Chapelcross. Public sector constraint payments saved from renewables generators.

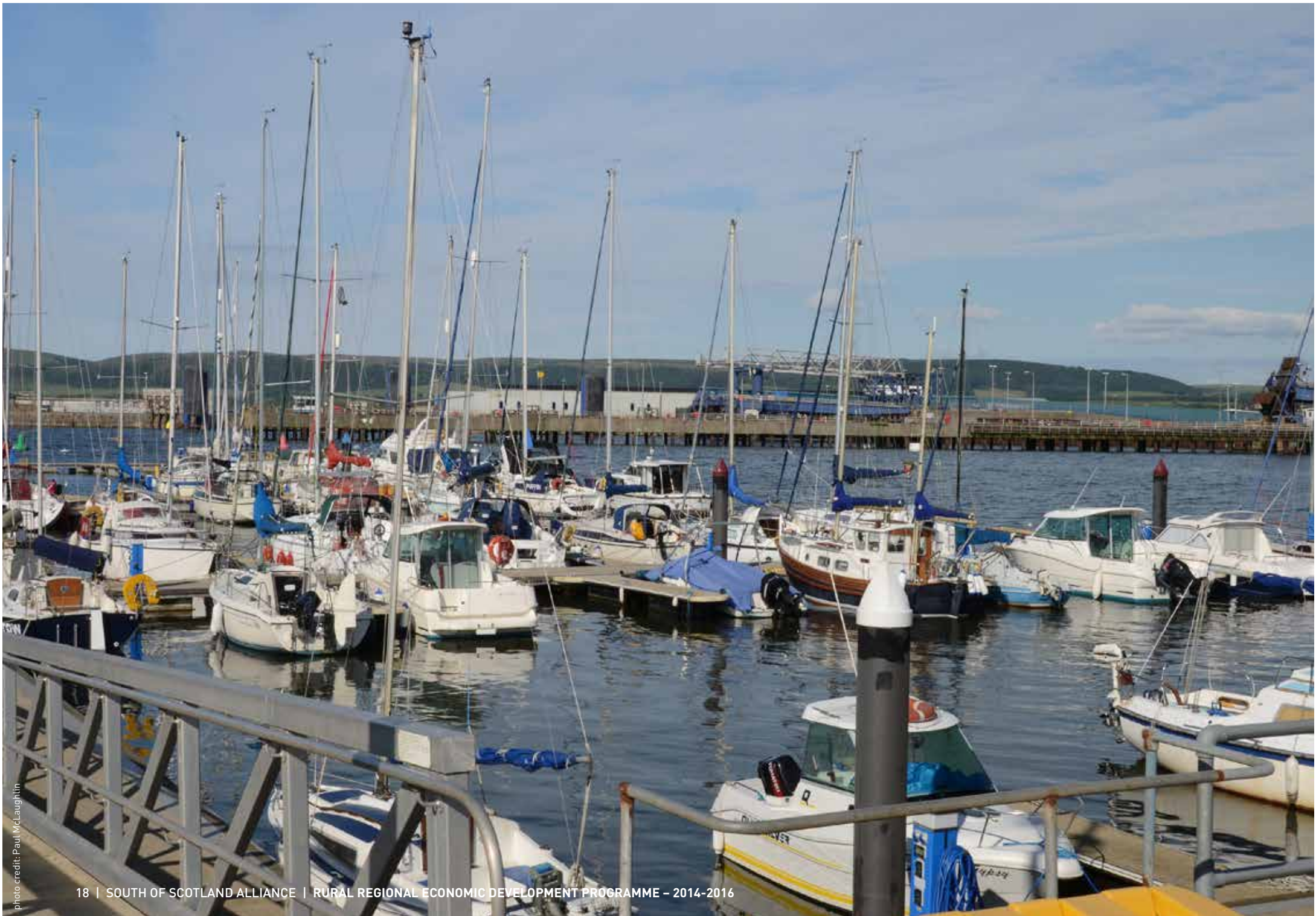


photo credit: Paul McLaughlin

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PROJECT 4 – STRANRAER WATERFRONT

Stranraer Waterfront Urban Design Strategy and Masterplan (and associated Development Brief) sets out a strategic vision 'To reposition Stranraer and Loch Ryan as a distinctive and successful marine leisure destination'.

The regeneration proposals set out the vision to develop an attractive seaside town and a high quality service hub for residents, businesses and visitors. To achieve this public, private and community partnerships will be required to attract investment to:

- Promote Stranraer as a gateway to Scotland and a visitor destination.
- Develop an attractive seaside town and a high quality service hub for residents, businesses and visitors.
- Develop Stranraer/Loch Ryan as a centre of excellence for marine leisure and green tourism.
- Make the waterfront a place where people choose to live, work, play and visit and create opportunities for new business, retail and leisure developments.
- Create new business and employment opportunities.
- Foster and strengthen community cohesion.

The ongoing delivery of this regeneration vision for Stranraer and Loch Ryan (and indeed wider South West of Scotland) is being progressed on the back of significant national government and council investment for roads and water infrastructure and the town centre and marina development. In total this amounts to in the region of £60m of committed investment. There are two strategic projects within the wider programme which are now at the stage of detailed development and delivery and are key to delivering successful and sustainable regeneration: the development of Stranraer Marina and the redevelopment of the East Pier (the former ferry site) into a mixed use site for complementary business, housing, retail and leisure uses.

STRANRAER MARINA

Building on national and international tourism and water sports research, the Stranraer Marine Leisure Study and Infrastructure Delivery Plan (Leigh Fisher Management Consultants, September 2012) provided clear evidence of demand for marine activities in Loch Ryan and detailed a range of investment required to maximise the potential of the Loch for sailing and marine tourism. This included initial public realm projects which have been delivered by the Council. The key

investment now required is to provide the Infrastructure from which to grow the scale of the marina. This is the provision of a new breakwater and additional pontoons (and associated on shore facilities) at an indicative cost of £3.8m.

EAST PIER REGENERATION

The Stranraer Waterfront and East Pier Design Brief has been developed to guide the regeneration of the 17ha former terminal site on the East Pier in Stranraer. This based on a mixed use approach which will include retail, commercial leisure, housing and new business and employment space. The majority of site is owned by Stena Line UK with associated Council land also part of the development site. The regeneration is being progressed under the terms of the Memorandum of Understanding (MOU) between the two parties. The MOU sets out the intentions of the Parties to work collaboratively and transparently for their respective interests to regenerate the Stranraer Waterfront and create wider positive regenerative impacts in the town. To support this a marketing strategy has been developed and agreed which aims to generate interest capable of fulfilling the masterplan aims and test the level of demand and commercial opportunities. This market testing process will be carried out by the end of June 2014 with a view to securing a lead developer by the end of October 2014.

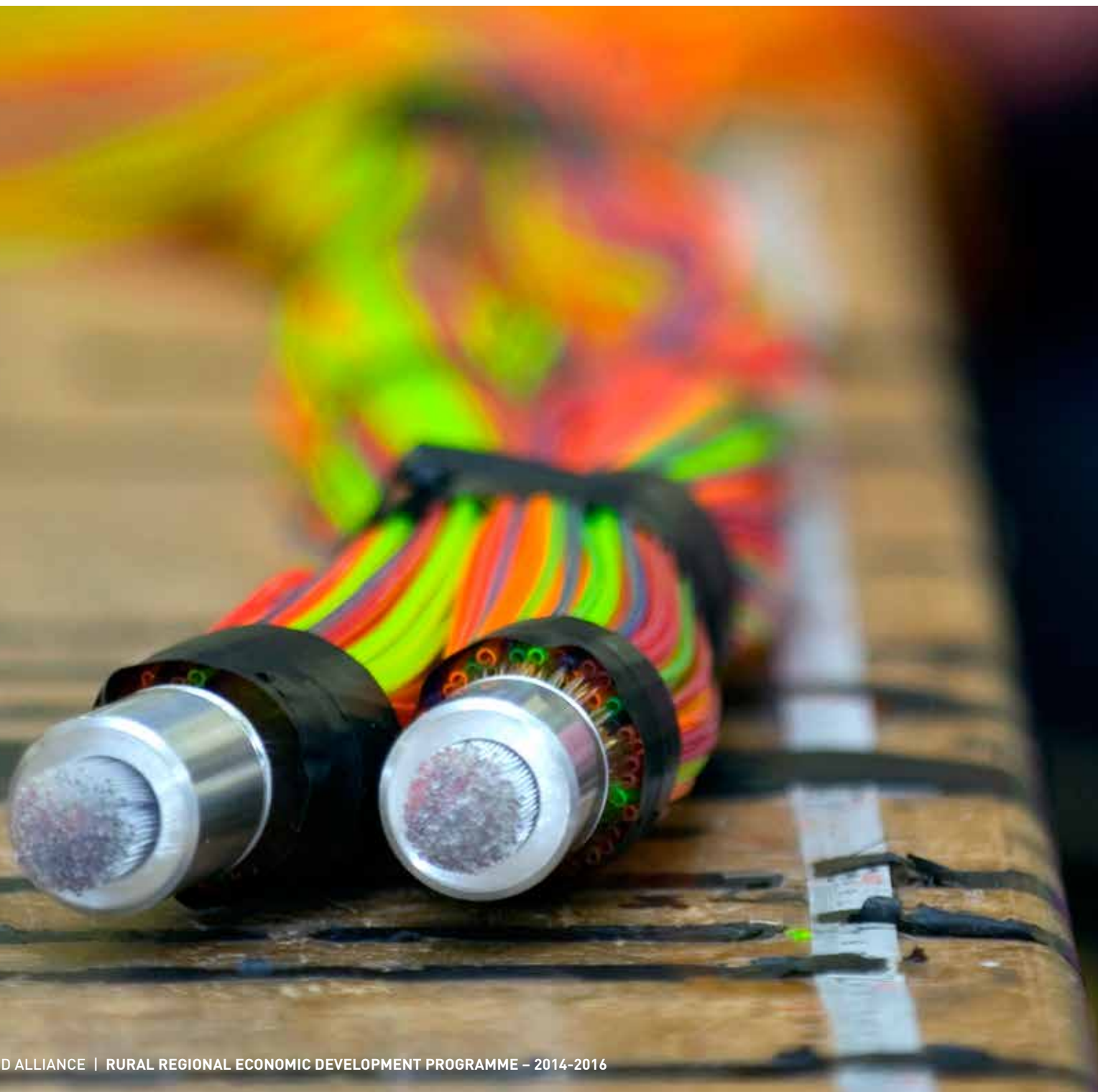
The Design Brief and an initial review of services into the site have identified the potential need for public sector investment in infrastructure to facilitate development of the site through private sector development. This is essentially forming new access into the site(s) ensuring linkages to the town centre and marina along the wider waterfront and upgrading core services and utilities. This would be on the basis of initial investment being recouped from the private sector in due course through developer reimbursements and clawback arrangements.

NEXT STEPS

In order to develop a more detailed investment proposal, a market appraisal and economic impact assessment is being progressed. This work will demonstrate further the economic benefits to be accrued from the delivery of the strategic projects outlined above and build the case for potential funding contributions from Scottish Government and Scottish Enterprise.

PROJECT 4 – STRANRAER WATERFRONT

	RESOURCE	LEAD (SUPPORT)	TARGET (ACTIVITY/OUTPUT)	TIMESCALE	OUTCOME MEASURED BY:	BENEFITS REALISED: OUTCOME (TO 2023) MEASURED BY:
Project 4A – Stranraer Marina						
Marina Infrastructure	£3.8M	DGC/SE/ Crown Estates	Development of Business Case. Design and delivery of additional breakwater. Phased expansion of 180 additional marina berths / pontoons.	September 2016	Creation of high quality marina and marine leisure base. Investment in essential marine infrastructure. Measured by: No. of marina users. No. of new businesses. Jobs created. Increased visitor spend.	The economic development potential of Stranraer and Loch Ryan is maximised. Creation of high quality marina and marine leisure base. Increased visitors to the South West of Dumfries and Galloway. Growth in tourism and marine related jobs and businesses.
Project 4B – East Pier Redevelopment						
Site Servicing	£2M	DGC/SE/ Private Sector	Improved access to the site. Improved physical linkages to the town centre and marina. Provision of essential services.	September 2015	Redevelopment of a brownfield former industrial site Inward investment. Measured by: Number of new business start ups. GVA/ jobs created. Level of private sector leverage £	The economic development potential of Stranraer and Loch Ryan is maximised. Increased visitors to the South West of Dumfries and Galloway. Physical regeneration of a former industrial site to provide growth in local jobs and businesses for the Stranraer and South West of Dumfries and Galloway.



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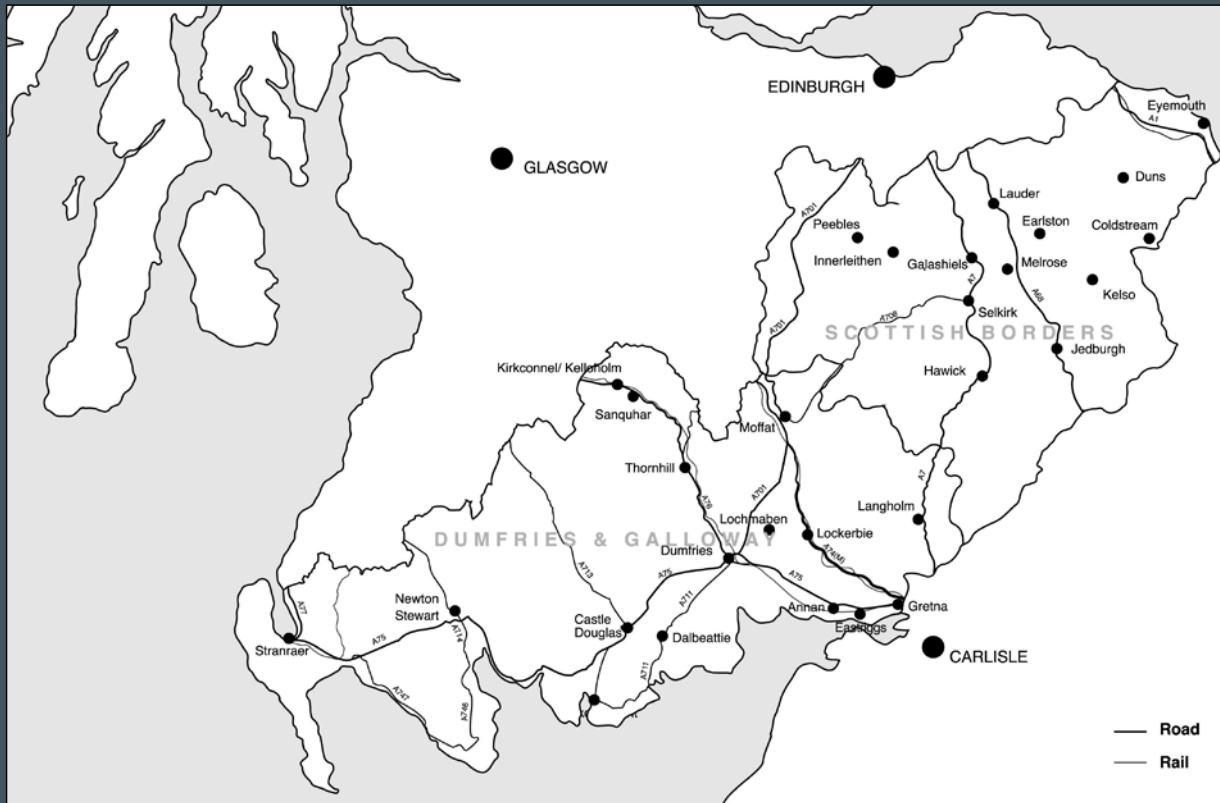
SCOTTISH ENTERPRISE STRATEGIC THEMES – RURAL FOCUS

Innovation, leadership and internationalisation are at the core of Scottish Enterprise's strategy and business activity. These strategic themes have often been difficult to take forward effectively in rural areas, for a variety of reasons. However, the Alliance recognises the importance of these themes and wants to develop more effective approaches for delivering them in rural areas such as the South of Scotland.

- **Improving rural innovation** by addressing weaknesses in rural businesses engaging with the Scottish Innovation System. Partners will work with key bodies to identify rural businesses with an ambition and potential to grow through increased innovation. Supported by SE, Interface and EU Funds (SRDP and ERDF), partners will:
 - facilitate knowledge sharing between businesses, and between businesses and academia;
 - facilitate project implementation and successful completion.

- **Investing in Leadership Development and the Ambition** of companies has a significant impact on company performance. Alliance partners will seek to raise the ambitions and business investment in leadership development across a wider segment of the business base.
- **Encouraging Internationalisation.** Companies that are involved in international and exporting activities are much more likely to have a higher median GVA. Alliance partners will seek to encourage a significant increase in companies across the South of Scotland considering and investing in the 'internationalisation' of their activities.

The Alliance partners will work together to ensure that these existing programmes and initiatives are used more effectively in the South of Scotland to support our business base.



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ALAN MANTHORPE

South of Scotland Alliance

Council Headquarters | Newtown St Boswells | MELROSE | TD6 0SA

tel: 01835 824000 ext: 5914 | email: alan.manthorpe@scotborders.gov.uk