

MAKE IT MORAY

For a better investment



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



MAKE IT MORAY

WELCOME

Welcome to Moray, a stunning and vibrant region with a healthy economy and a broad business base providing a range of high quality jobs and strong communities with a growing population. It is an exceptional environment in which to live, work and relax.

Highlands and Islands Enterprise (HIE) are here to help you make the move to Moray. We provide a complete range of services, information and advice that you may require when choosing to locate your business in Moray.



MAKE IT MORAY

OUR ASSETS

Moray is a region with outstanding natural resources, world renowned brands and a high standard of living.

- It offers an exceptional environment in which to live, work and relax
- This area has a track record in military aerospace. RAF Lossiemouth is the service's largest fast jet base. RAF Kinloss once the main operating base for the Nimrod MRA4 has now been replaced by a British Army Base
- Moray is emerging as a prime location in research and development for the life sciences sector
- Moray produces the most important concentration of activity in the world famous Scottish food and drink industry
- Moray is the natural location to establish an engineering business to support the oil and gas and renewable energy sector
- Moray offers an available workforce with a great reputation for business process outsourcing
- There are a number of development opportunities available for hotel and tourism businesses, in particular within Elgin city
- Moray offers direct access to national trunk routes and the UK rail network. There are two international airports within easy reach

TOP TEN REASONS TO INVEST IN MORAY

From educational excellence to pioneering innovation, there are many reasons to invest in Moray. Here are our top ten.

HIGH RETURNS

Moray is one of the most cost effective regions (relative to Scottish average) with competitive labour costs, ensuring best value and enabling your company to achieve a high return on investment.

PROVEN TRACK RECORD

Moray has the expertise to support the growth of world class businesses. The region is home to renowned food and drink brands, from Walkers shortbread to Baxters foods and numerous Speyside whiskies providing high end products to international markets, as well as small, high quality niche producers.

Thirty years of operational experience in energy-related engineering and fabrication as well as the increase in engineering skills make its coastal location perfect to support Scotland's ambition, to be a world leading renewable energy powerhouse.

PIONEERING INNOVATORS

A key partner within the UK's newest university, the University of the Highlands and Islands (UHI), the Moray education system is responsive in delivering the skilled workforce needed. The collaborative pioneering work of digital and medical professionals in the region is putting Moray on the map in the development of Scotland's digital healthcare sector.

The Alexander Graham Bell Centre located at Moray College UHI compliments the ground breaking work being carried out in digital healthcare in the Moray region.

LIVE. WORK. RELAX. MORAY

Moray is well known for its high standard of living. The area offers a rich local culture, friendly communities, superb facilities and services, entertainments, leisure and sports. With affordable housing, great schools and a dry climate, Moray is a great place to live, work and relax.

ACCESS TO MARKETS

Moray is located between Scotland's oil capital Aberdeen and the Highlands' capital city, Inverness, with easy access to rail, road and international airport links. Inverness Airport is only 35 minutes from Elgin, the Commercial and Administrative Capital of Moray whilst Aberdeen Airport is no more than a 90 minute drive.



The Enterprise Park Forres

SPACE TO GROW

We have space for your business to grow with high quality infrastructure across the region.

- The Enterprise Park Forres (EPF), Moray's premier business location offers an excellent working environment, with a range of high quality business units and land development opportunities. Find out more at www.enterpriseparkforres.co.uk
- The Moray Council also has a range of property across Moray including Buckie Harbour.

Moray offers high levels of broadband connectivity, meeting your worldwide online requirements.

WORKING TOGETHER

Moray has developed a mature partnership model of working which brings together all aspects of its community. Eighteen partner groups including Moray Council, development agency HIE, Skills Development Scotland, and business, health, community and academic representatives are working together to support your investment in the area.

BUSINESS SUPPORT

Businesses locating to the Moray area may be able to benefit from the support of HIE, with specialist business advice, infrastructure, networking, access to industry experts and exclusive business programmes dependent on growth potential, ambition and sector. We can help you identify and access funding and provide a comprehensive investor support programme. Our team can talk through your business plan and the financial needs of the business as part of our wider discussions about what Moray has to offer for you.

STRONG WORK ETHIC

Moray offers a well educated, skilled workforce with a great reputation for customer service. Moray companies have low turnover of staff and high retention rates. The region has a growing population; the 2011 census shows an increase to 93,300 people resident in Moray. However, the area has access to an even wider labour pool as there are 236,000 people within a one hour drive of Elgin. Moray has 85% of its working age population in employment which is higher than the Scottish average (80%).

SKILLS

Workers in Moray are more likely to have a skill than across Scotland as a whole. Moray College is part of the new UHI and has over 8,000 enrolled students. It offers a range of degree and postgraduate courses. Moray has a strong educational base and there are eight secondary schools, which in 2011 produced 1,021 school leavers. Some 89% went on to further or higher education or to gain employment – above the Scottish average of 82%.

KEY SECTOR PROFILES

LIFE SCIENCES

There are a number of strands of life sciences activity emerging in Moray. The area has a growing reputation in developing digital and online technologies to improve service delivery and efficiency. Although these strands have emerged independently, they are complementary and have arisen because of the unique health ecosystem found in Moray.

Collaboration between the cutting edge work of experts from Dr Gray's Hospital in Elgin and care and health services in the community means it is in a strong position to develop, pilot and test comprehensive digital healthcare models.

The Alexander Graham Bell Centre is designed to support the ground breaking work being carried out in digital healthcare in the Moray region. The £6.5 million project has created a "centre of excellence" located on the Moray College UHI Campus in Elgin. This collaborative hub will provide opportunities and facilities for new business and research, creating important and strong links between the private sector, medical practitioners and academia.

The Enterprise Park Forres has been awarded Enterprise Area Status for Life Sciences by the Scottish Government, covering 25 acres of the 100 acre park. Enterprise area designation brings additional incentives and support to life science investors locating at EPF.

ENGINEERING, PRODUCTION AND MANUFACTURING

Moray is a natural location to establish an engineering business to support the oil and gas and renewable energy sectors. With its long history as an engineering and fabrication base for the oil and gas and distillation industries it is perfectly placed for diversification into the renewable energy supply chains.

Electrical and mechanical engineering skills are highly developed in the local workforce, including those making the transition from armed forces to civilian life. The strengths of engineering, strategy to diversify the benefits of the oil and gas industry around Scotland put Moray in a prime position as a great place to invest.

The Moray Firth plays an increasingly important role in offshore wind energy; it is home to the Beatrice wind demonstrator, the world's first deep water offshore wind turbine deployment. Over the next few years 384 wind turbines will be constructed in the Moray Firth.

BUSINESS SERVICES

Moray offers an available workforce with a great reputation for business process outsourcing, with leading process and outsourcing company, Capita, being located on EPF. The region's location represents cost efficiencies with lower average rents and salaries, while providing an experienced and loyal workforce which is highly skilled in delivering excellent customer service.

A homeworking initiative supported by HIE has given outsourcing companies access to a pool of labour previously unavailable to the sector.

FOOD AND DRINK

Moray has some of the strongest food and drink export businesses in Scotland, including some of the world's leading brands - ranging from indigenous Baxters Food Group and Walkers Shortbread to the world's leading premium drinks business Diageo. There is also a strong presence of independent international seafood companies.

The strength of Speyside's heritage has attracted significant investment. The 'Speyside' region boasts the highest concentration of whisky distilleries in Scotland including world bestsellers: Glenlivet, Glenfiddich, Glen Grant and The Macallan. These companies continue to innovate and invest in new opportunities.

TOURISM

Moray provides a firm foundation for a high value tourism sector and represents a hidden opportunity. The location is highly accessible and has a tremendously varied tourism offer with exciting development opportunities available for hotel and tourism businesses.

The area is famous for hunting, shooting and fishing. The mountains, coast, forestry, National Park and market towns offer outdoor and indoor pursuits. Moray is also a base for international and national tourism businesses.



OUR WORKFORCE

Moray has a growing population. The 2011 census shows an increase to 93,300 people resident in Moray.

The area has access to an even wider labour pool, with 236,000 people within a one hour drive of Elgin.

Jobs in the public sector, including the RAF, account for 34% of the working population and have a major influence on the economic health of the region.

Moray has developed concentrated activity in particular areas including tourism, food and drink, life sciences and manufacturing.

Food and drink manufacturers employ 10% of Moray's workforce.

Employment in professional, scientific and technical activities now number over 8,300 individuals.

Manufacturing is significant in Moray, supporting 17% of the workforce compared to 8% for Scotland as a whole. The high proportion of workers in skilled trades also shows the importance of manufacturing and construction locally.

Tourism accounts for 7.5% of the workforce, again higher than the Scottish and UK averages.

Average wage levels are 13 % below the Scottish average and 16% lower than UK levels.

Moray has 85% of its working age population in employment which is higher than the Scottish average (80%).

2010	ANNUAL SALARY	PERCENTAGE OF DOCKLANDS
London Docklands	44,691	100.0
Manchester	26,525	59.4
Birmingham	25,878	57.9
Liverpool	25,645	57.4
Leeds	25,249	56.5
Newcastle upon Tyne	24,894	55.7
Glasgow City	24,857	55.6
Cardiff	24,558	55.0
Moray	22,247	49.8

MILITARY COMMUNITY

There have been RAF bases in Moray for around 65 years. These bases have made a highly significant contribution to the population and economic prosperity of the area. As part of the UK Government's defence review, the future of RAF Lossiemouth, which is the RAF's largest and busiest fast jet base has been secured.

RAF Kinloss has now undergone transition to become a British Army base. The change of use at Kinloss is attracting significant investor interest, because of the well qualified, highly skilled workforce. In addition, it is expected that some resources from the base may become available for other users.

Retiring RAF personnel possess valuable skills particularly in the areas of electronic, mechanical and aeronautical engineering, information technology, management and administration. The combination of this skilled workforce provides inward investors with potential employment opportunities within the local population of Moray.

All RAF personnel are well trained and in addition to their core skills they complete many other civilian-recognised standard courses during their career. These vary from personal development to improving their management and leadership abilities, through work environment courses such as Health and Safety and Quality Assurance through to specialised disciplines such as radar and technician courses.

The broad occupation categories include:

- Electronic Engineering
- Aircraft Engineering
- General Engineering
- Mechanical Engineer
- Electrical Engineer
- Airframe Technician
- Propulsion Technician
- Avionic Technician
- Aircraft Painter
- ICT Technician
- Maintenance Technician
- Logistics
- Air Traffic Control
- Flight Operations
- Motor Mechanic
- Driver (HGV/Forklift)
- Warehouse operative
- Graphics Officer
- Administration
- Accounting
- Catering and Hospitality
- Management
- Medical
- Photography
- Health and Safety
- Security
- Catering Steward

ACADEMIA

UNIVERSITY OF THE HIGHLANDS AND ISLANDS

The University of the Highlands and Islands (UHI) is a distinctive partnership of colleges, learning and research centres working together to provide university level education to people throughout the Highlands and Islands of Scotland and beyond. UHI has over 8000 higher education students studying undergraduate and post graduate education across its various locations, with degree courses covering engineering, health and wellbeing and creative industries.

www.uhi.ac.uk/en

MORAY COLLEGE UHI

As one of the members of the UHI, Moray College's main campus is in Elgin, with an additional four learning centres in the area branded as Scottish University for Industry Learning Centres.

The college offers higher and further education courses over a wide range of vocational, technical and academic qualifications including:

- Science and technology
- Health and wellbeing
- Engineering and construction
- Business and leisure
- Creative industries
- Arts, social sciences and theology
- Environmental and rural studies
- Gaelic medium studies

The UK's first undergraduate course in web science jointly developed by Webscience Trust, MIT and University of Southampton will be completed at Moray College.

Moray is an emerging location for life sciences with a growing digital health cluster. The Alexander Graham Bell Centre for Digital Health, located at the Moray College campus compliments the activity being done in the Moray region.

www.moray.ac.uk

GLASGOW SCHOOL OF ART - CENTRE FOR DESIGN INNOVATION

One of Europe's most renowned international art schools operates the Centre for Design Innovation as a satellite centre in Moray. In addition to employing researchers, the Centre offers student placements and internships with Highlands and Islands businesses, aiming to create new research and commercialisation opportunities. One of its priority research areas is health and wellbeing. It also supports 100 businesses to engage in design led innovation. Glasgow School of Art is one of Britain's foremost institutions for creative research, education and practice.

www.gsa.ac.uk

INVERNESS COLLEGE UHI

Inverness College UHI is the largest college in the Highlands and Islands, Inverness College also offers a wide range of vocational, technical and academic qualifications, including higher national certificates, diplomas, modern apprenticeships and Scottish Vocational Qualifications. The college works closely with local employers to ensure relevant course content.

www.inverness.uhi.ac.uk

BANFF AND BUCHAN COLLEGE, FRASERBURGH

Banff and Buchan College is located within one hour's drive of Elgin and attracts students from all over the world. The main campus is in Fraserburgh. The college offers a range of courses with particular strengths in engineering and nautical disciplines.

www.banff-buchan.ac.uk

THE UNIVERSITY OF ABERDEEN

The University of Aberdeen has 500 years of experience at the forefront of teaching, learning and discovery. As the 'global university of the north', it has consistently sent pioneers and ideas outward to every part of the world. It is an ambitious, research-driven university with a global outlook, committed to excellence. Multidisciplinary research centres and institutes bring together experts to work with colleagues across the UK and beyond on the big issues of today.

www.abdn.ac.uk

THE ROBERT GORDON UNIVERSITY

Robert Gordon University has an outstanding international reputation, producing confident, highly employable graduates, undertaking ground-breaking research and developing the careers of professionals. The university's teaching staff have an outstanding reputation for quality and academic research and a track record in graduate employment that is the best in Scotland. The university's range of degree courses include online degrees as well as traditional taught courses in subjects as diverse as art and design, management and engineering.

www.rgu.ac.uk/about



TRANSPORT

Moray is well linked by road, rail and air to other parts of the UK.

Train services connect Glasgow and Edinburgh at least 9 times each working day with journey times from just 4 hours.

Moray offers direct access to national trunk routes and rail.

	TRAINS PER DAY	DURATION FROM FORRES
Inverness	11	30mins
Aberdeen	11	1hr 50mins
Glasgow	10	From 4hrs
Edinburgh	9	From 4hs

Two international airports - Aberdeen and Inverness - are close at hand.

The main route through Moray is the A96 trunk route connecting Moray with both Inverness and Aberdeen and onward to other parts of the UK.

Every major UK town and city is within a legal day HGV driving, reaching 90% of the total UK population.

Drive times are illustrated on the map to the right:



Moray has excellent access to air services. Inverness Airport is only 35 minutes from Elgin whilst Aberdeen Airport is no more than a 90 minute drive.

Moray has better air connections than most UK locations with 138 flights per week including 35 flights to London airports and a daily connection into the international hub at Amsterdam. Further international flight options can be accessed from Aberdeen Airport which serves 57 international locations with the key destinations shown in the below map.







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LOCATING YOUR INTERNATIONAL BUSINESS IN MORAY

Highlands and Islands Enterprise, Moray Council, and Scottish Development International (SDI) all work together to promote Moray's strong portfolio of assets and advantages to inward investors from around the globe.

These organisations can support you with almost every aspect of the decision making process, whether it's finance or IT, finding suitable premises or staff recruitment, product development or marketing.

Any business interested in exploring the opportunities available in Moray will have a dedicated team to work with every step of the way, both before and after you've made the move to Moray – helping to get your business up and running quickly, and building strong foundations for growth and development.

We can help you identify and access funding and provide a comprehensive investor support programme. In some parts of Moray and for some sectors of investment there may be loan, venture capital or grant funding available for investment. Our team can talk through your business plan and the financial needs of the business as part of our wider discussions about what Moray has to offer for you.

**CONTACT US TO FIND OUT MORE ABOUT HOW
YOU CAN BRING YOUR BUSINESS TO MORAY**

www.hie.co.uk

Steven Hutcheon

Head of Regional Development

T +44 (0)1309 696 000

E steven.hutcheon@hient.co.uk

Highlands and Islands Enterprise
The Enterprise Park Forres
Moray
IV36 2AB

