

Policy and Sustainability Committee

10.00am, Tuesday, 1 June 2021

Edinburgh Economy Strategy Development Report and City Centre Recovery Action Plan

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| Executive/routine Wards Council Commitments | Executive All 1 - 9 |
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1. Recommendations

- 1.1 It is recommended that the Policy and Sustainability Committee notes:
 - 1.1.1 The Edinburgh Economy Strategy Development Report in appendix 1, which will be used as a framework for the engagement and consultation process to inform the Edinburgh Economy Strategy;
 - 1.1.2 The Draft City Centre Recovery Action Plan in Appendix 2 which lays out the activity underway and planned which will support the economic recovery of Edinburgh city centre.
 - 1.1.3 The proposed consultation and engagement process for further development of the Edinburgh Economy Strategy and the Draft City Centre Recovery Action Plan; and
 - 1.1.4 Agree that findings from the consultation and final draft documents will be brought for consideration by the Policy and Sustainability Committee in November 2021.

Paul Lawrence

Executive Director of Place

Contact: Gareth Dixon, Senior Policy Adviser

E-mail: gareth.dixon@edinburgh.gov.uk | Tel: 0131 529 3044

Report

Edinburgh Economy Strategy Development Report and Draft City Centre Recovery Action Plan

2. Executive Summary

- 2.1 This report sets out the issues which have been identified from the engagement carried out to support development of a refreshed Edinburgh Economy Strategy. The report proposes priorities and actions to be taken forward to meet the needs of Edinburgh's economy through recovery from pandemic.
- 2.2 The report also provides a summary of action under way or planned which will support city centre recovery in appendix 2; the Draft City Centre Recovery Action Plan.
- 2.3 Proposed next steps involve a period of consultation with stakeholders on both of these documents with a view to reporting to Policy and Sustainability Committee in November 2021.

3. Background

- 3.1 In [June 2018](#), the City of Edinburgh Council approved the Edinburgh Economy Strategy and a programme of work to enable good growth for Edinburgh's economy. The strategy set out a focus on work to promote inclusion and innovation in Edinburgh's economy, and an approach to delivery built around collaboration between anchor institutions in the city.
- 3.2 As a part of the strategy programme, the Council committed to publishing an annual review of progress towards delivery of the strategy. The second of these annual progress reports was published on [1 December 2020](#).
- 3.3 At this meeting, it was agreed that a process for renewal of the Edinburgh Economy Strategy be completed, in response to emerging challenges including the Covid-19 related economic recession, and to ensure continued alignment with core Council priorities to tackle poverty, promote sustainability and wellbeing.
- 3.4 On the [23 July 2020](#) the City of Edinburgh Council provided an initial response to the Edinburgh Climate Commission's publication calling for all city leaders and businesses to commit to a green economic recovery. the Edinburgh Climate

Commission published its first report '[Forward, Faster, Together: Recommendations for a Green Economic Recovery in Edinburgh](#)' in July 2020.

- 3.5 In supporting the economic recovery of the city, the Council is already committed to delivering, operating and funding a range services and initiatives. This includes but is not limited to:
- 3.5.1 the continued delivery of business support through in house business advisors and managing and funding employability services. In the last year over 3,800 Business Gateway client engagements and more than 1,300 employability and skills clients were supported into work and learning;
 - 3.5.2 the continued management and processing applications for crisis support, which during 2020 totalled over 8,000 applications for crisis support, a 76% increase on the same period in 2019;
 - 3.5.3 regulatory and transactions service continuing to process millions of pounds worth of new business grants to support city businesses and the economy. In the last year the Council processed around £200 million worth of grants;
 - 3.5.4 leading in the design and delivery of the new Edinburgh Youth Guarantee with an allocation of over £1.9 million for 2021/22;
 - 3.5.5 delivering a new 2021/22 budget on [18 February 2021](#), to add further £0.4 million to help people at risk of homelessness and support those experiencing homelessness into secure tenancies;
 - 3.5.6 providing additional funding of £500,000 for Edinburgh's summer festivals. This funding will help support the recovery of the city's creative economy for performers, production support and the wider sector supply chain;
 - 3.5.7 funding for the new marketing campaign Forever Edinburgh, which was delivered jointly by the City of Edinburgh Council, ETAG and Visit Scotland; and
 - 3.5.8 supporting the opening of new major infrastructure developments in Edinburgh such as the Edinburgh St James Quarter for the Summer 2021.
- 3.6 In addition, the Council is participating in Scottish Government workshops through the Scottish Cities Alliance to inform Scottish Government support for city centre recovery plans.

4. Main report

Engagement

- 4.1 The Edinburgh Economy Strategy Development Report was drawn together from engagement with stakeholders and business partners. To test emerging findings, share knowledge and gather feedback, Council officers held a series of regular meetings from early January 2021 with the Edinburgh Advisory Panel, chaired by Councillor Kate Campbell. This also provided a platform to make linkages with work others carry out in the city to support the economy.

- 4.2 Further engagement was undertaken with groups such as the Edinburgh Tourism Action Group, participation in a range of network events, including those organised by the Edinburgh Chamber of Commerce, and workshops with industry representatives from the city on parallel activities such as the transition to a net zero economy. To help identify the key issues for focus and priorities for the new economy, one-to-one discussions with business leaders were also held through the period from January to May 2021.
- 4.3 The process was also informed by review of key documents and analysis published by partners during this period, including the Edinburgh Business Resilience Group (EBRG) Interim Report published in April 2021. The EBRG is a group of over 60 organisations, bringing together a cross-section of Edinburgh's business, education, public sector, third sector, and other key city stakeholders. This group was convened and supported by the Edinburgh Chamber of Commerce, and independently Chaired by Ian Marchant, Chair of Dunelm Energy.

Key issues raised from engagement

- 4.4 Stakeholders and local business partners identified the key issues and pressures facing Edinburgh, which include:
- 4.4.1 Slow economic recovery and business debt: The recovery from recession will be slow and challenging for different parts of the economy. Estimates from the Scottish Fiscal Commission show that output will not return to pre-pandemic levels until the beginning of 2024, and it will be 2026 before the economy recovers all the capacity and potential lost during 2020. In addition, Scottish figures suggest that 20% of Scottish Businesses were struggling with risk of business insolvency which could impact the speed of recovery.
- 4.4.2 Unemployment: Analysis of recent economic data in Edinburgh has shown that the city has experienced a three-fold increase in the number of people claiming universal credit (18,000 people in Edinburgh). The Furlough scheme, which supported over 35,000 people as at the end of March 2021, is keeping unemployment low (only increasing by from 7,200 or 2.6% to 11,100 or 3.9% from 2019 to 2020) in Edinburgh, there is concern over the impact this will have on jobs when the scheme ends.
- 4.4.3 City centre: Over much of 2020 visitor numbers to the city centre fell and the future for many businesses located there remains uncertain. In addition, the impact of the pandemic on the footprint of large and medium sized employers in the city centre is not yet fully understood but could have a significant impact on the city centre economy as Edinburgh comes out of lockdown. The city centre places an important role for the city overall it is a place that hosts events, places of work, homes and the night-time economy.
- 4.4.4 Tourism: The number of visitors to Edinburgh fell significantly and the tourism sector, along with all of the businesses and jobs supported, have lost successive seasons of trade from travel, business and leisure tourism, events and festivals. Whilst the summer season in 2020 saw a boost in domestic tourism activity in rural areas of Scotland, Edinburgh did not see

such a boost and remained significantly down on past trends for much of 2020. Edinburgh retains a critical role in the future of tourism to Scotland especially for overseas visitors with many using the city as a gateway to the rest of Scotland.

- 4.4.5 International status: Edinburgh businesses express some concern over the uncertainty and impact of Brexit challenges on workforce and future labour supply issues, as well as trade with the European Union (EU). As part of its recovery, Edinburgh should promote its strengths and position itself as a leading European city for inward investment and trade, as well as being a welcoming city.
- 4.4.6 Inequality: Inequality has increased during the recession. Women, young people, people with disabilities, those with caring responsibilities, and people working in low paid jobs are all much more likely to have lost income due to the pandemic so far. Job numbers among people under 24 are falling twice as fast as the workforce as a whole in Edinburgh. Those industries that experienced less impact include finance, public education and health.

Edinburgh Economy Strategy Development Report

- 4.5 Building on these findings, Appendix 1: Edinburgh Economy Strategy Development Report sets a framework for consultation on the priorities and actions the Council and partners need to deliver to ensure a strong recovery for Edinburgh's economy.
- 4.6 The report sets out five priorities, and 31 actions that will be used as a framework to guide further discussions with stakeholder and partners. Proposed priorities are:
 - 4.6.1 Help businesses to innovate and adapt;
 - 4.6.2 Promote access to fair work and opportunities for people to progress;
 - 4.6.3 Lead a just transition to a net zero economy¹;
 - 4.6.4 Create vibrant places for businesses and people; and
 - 4.6.5 Maintain Edinburgh's place as a global city.

City Centre Recovery Action Plan

- 4.7 In addition to this city-wide strategic plan, the findings of consultation carried out to date clearly identifies a need for specific and tailored actions to support the recovery of Edinburgh's city centre economy.
- 4.8 Appendix 2 The Draft City Centre Recovery Action Plan provides a draft action plan to meet this need. The draft plan sets out a programme of 25 actions aiming to help city centre businesses to adapt and thrive, and aiming to build momentum for longer term recovery.

¹ A "just transition" is about moving in a way where the benefits of the change are shared widely. "Net zero" is when any greenhouse gas emissions put into the atmosphere are balanced out by the greenhouse gases removed from the atmosphere, so that the "net" effect is zero emissions. Edinburgh has committed to 'net zero' emissions by 2030. To achieve this, we must reduce the emissions we generate close to zero, and by 2030, make sure that we remove the same amount of greenhouse gases that we as a city, put into the air."

- 4.9 Further consultation and development of this plan will be undertaken alongside the programme of work developed for the refresh of the city-wide Edinburgh Economy Strategy. Such activity will take place during June to September 2021, with publication of a final City Centre Recovery Plan in November 2021.

5. Next Steps

- 5.1 It is proposed to undertake public consultation and engagement on both appendices to this report between June and September 2021. Consultation findings will be reported to the Policy and Sustainability Committee in November 2021, alongside final drafts of the Edinburgh Economy Strategy and the City Centre Recovery Action Plan.
- 5.2 As part of this approach, the Edinburgh Economy Strategy Development report and the Draft City Centre Recovery Action Plan will be published on the Consultation hub for a full public consultation between June and September 2021 and running for a minimum of 12 weeks, complying fully with the new Council Consultation Policy.
- 5.3 In addition to the consultation laid out above the Council will also undertake a survey of city businesses, gathering insight on business plans to return to office-based activity over the coming 6, 12 and 24 months. This insight will support the strategy development; in particular in relation to the city centre.
- 5.4 Further engagement activities will include elected member workshops, and a bespoke series of workshops with partner agencies including the Edinburgh Chamber of Commerce, the Edinburgh Future Institute and the Economic Advisory Panel. Officers will also continue to draw on engagement work run by other Council teams, the Scottish Government, other Government agencies and will explore other opportunities for engagement with interested parties and networks.

6. Financial impact

- 6.1 Actions in this report can be taken forward within existing agreed budgets. Any additional impacts arising will be considered as part of future reports to Policy and Sustainability Committee.

7. Stakeholder/Community Impact

- 7.1 Details of stakeholder and community engagement in delivery of a renewed economy strategy are outlined in the main report section and will be considered as part of future reports to Policy and Sustainability Committee.

8. Background reading/external references

- 8.1 None.

9. Appendices

- 9.1 Appendix 1: Edinburgh Economy Strategy Development Report.
- 9.2 Appendix 2: Draft City Centre Recovery Action Plan

Edinburgh Economy Strategy Development Report

June 2021

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Executive Summary

In June 2018, the City of Edinburgh Council approved the Edinburgh Economy Strategy and a programme of work to enable good growth for Edinburgh's economy.

In the past 12 months significant challenges for the city's economy have arisen as a result of the Covid 19 pandemic and the UK's withdrawal from the EU, which mean that a refresh of this strategic approach is needed.

This paper represents the output of a first phase of work carried out for that strategy refresh. It presents an analysis of the challenges the city economy faces in recovery from pandemic, the strengths it can build on, and the levers available to the city to drive recovery.

In doing so, the paper presents a framework for consultation on the next steps of the strategy's development. Publication of this framework marks the end of phase 1 of this strategy development project. Following publication, timelines for the project include:

- **Consultation with citizens, employers and stakeholder – June to September 2021**
- **Publication of a final refreshed Edinburgh Economy Strategy – November 2021**

Findings so far

Edinburgh's economy faces the biggest challenge for more than a generation over the next few years.

- Recovery from pandemic will be slow, with many businesses in all sectors still at risk of insolvency
- Unemployment and rates of low income have risen quickly, but will be slow to fall
- The city centre has been hard hit, alongside a sharp downturn experienced by the visitor, retail and hospitality economy

- The impact on low income groups has been hardest, with evidence of increasing inequality across the city, and
- The impacts of Brexit are only beginning to become clear, with slow exports and business adapting to changing supply chains.

Alongside these challenges, the city has critical strengths and opportunities to build on through its recovery from pandemic. Edinburgh has:

- A highly skilled and flexible workforce and a young, diverse, and growing population
- World leading strengths in Data Driven Innovation in a city committed to being the Data Capital of Europe
- Major competitive advantages in key technology sector clusters, including Fintech.
- Core, globally competitive industries in finance, leisure and business tourism, and culture
- Internationally leading higher education and research institutions
- A City Region Deal delivering investment and job creation over the next 15 years
- A strong global reputation and status as a historic capital city
- A thriving voluntary and social enterprise sector
- A strong pipeline of infrastructure investment planned for the next 18 months
- A city-wide commitment to delivering net zero by 2030, and the investment opportunities which arise from that.

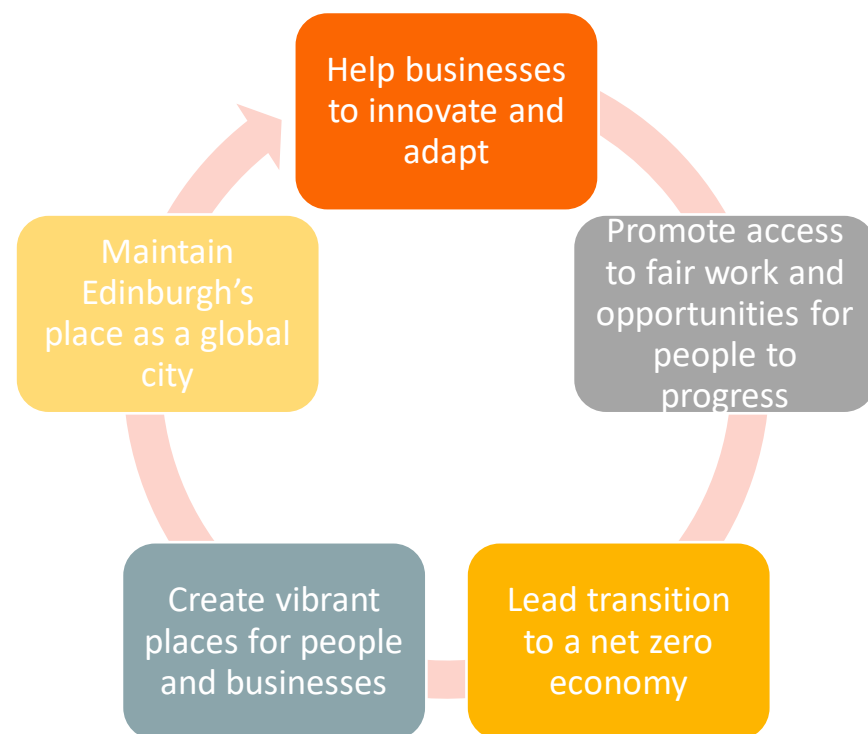
A framework for consultation

In response to these findings, this report sets out a framework for the next stage of developing a refreshed Edinburgh Economy Strategy. The report was informed by a series discussions and workshops held in early 2020 with partners, stakeholders and business leaders.

This process helped identify a set of actions that are focussed on what the Council and other city stakeholders need to deliver in support of a strong recovery for Edinburgh's economy. These actions are structured around five

priorities that will be used throughout further consultation and engagement with city partners and stakeholders over the next few months.

To meet the needs of the Edinburgh Economy through recovery, the Council and its partners should aim to deliver against **Five strategic priorities and 31 actions**.



Questions for consultation:

This paper represents a draft framework for consultation and discussion during June to September 2021.

Throughout the document are highlighted key questions for consideration during this consultation period.

The paper outlines five routes through which citizens, businesses and stakeholders will find opportunities to input into the development of the final strategy document.

These will include:

- Online consultation through the Edinburgh Consultation Hub
- A survey of city businesses
- Business workshops and consultation events
- Discussion events and seminars
- Elected member cross party workshops

Further details on these approaches will be published and promoted on the Council website and social media channels throughout June to September 2021.

Draft priorities and actions for consultation

Timeframe

| | | |
|--|---|---|
| Help businesses to innovate and adapt | <ol style="list-style-type: none"> 1. Support continued access to UKG/SG business support schemes. 2. Ensure Business Gateway and local business support is fit for purpose 3. Enable access to vacant sites in the city, including the city centre 4. Ensure licensing, regulation and planning systems create spaces for all businesses to thrive 5. Adopt the Logan Review recommendations for investment in tech infrastructure in Edinburgh 6. Support development of Edinburgh innovation ecosystem to be on par with the best in Europe | <i>In place & ongoing</i> <i>2021-2023</i> <i>2021-2023</i> <i>2021 onwards</i> <i>2021-2023</i> <i>2021-2023</i> |
| Promote access to fair work and opportunities for people to progress | <ol style="list-style-type: none"> 7. Become a Fair work City and promote Living Wage accreditation for businesses across the city. 8. Apply the Fair Work first in procurement principle to every tender 9. Maximise the community wealth building opportunities from city investments. 10. Ensure flexibility and improved access to skills and retraining opportunities 11. Support all individuals with barriers to employment with Edinburgh Guarantee. | <i>2021 onwards</i> <i>In place & ongoing</i> <i>2021 onwards</i> <i>2021-2023</i> <i>In place & ongoing</i> |
| Lead a just transition to a net zero economy | <ol style="list-style-type: none"> 12. Agree and deliver an Edinburgh 2030 Climate Strategy. 13. Connect net zero investment to opportunity 14. Support Edinburgh Climate Compact to increase business commitment to reduce emissions 15. Embed net zero into the city's business support offering 16. Explore a green innovation challenge finance scheme 17. Deliver Net Zero Procurement by 2030 18. Promote Edinburgh's circular economy 19. Net zero skills and workforce development | <i>2021 onwards</i> <i>2021-2023</i> <i>2021-2030</i> <i>2021-2023</i> <i>2021-2023</i> <i>2021-2030</i> <i>2021-2023</i> <i>2021-2023</i> |
| Create vibrant places for businesses and people | <ol style="list-style-type: none"> 20. Working with partners to develop a City Centre Recovery Plan. 21. Transform Edinburgh's Waterfront into one of the city's landmarks and enhance the economic value of Port infrastructure 22. Roll out our place-based development and investment programme 23. Deliver high quality, sustainable, mixed used housing developments under the 20-minute neighbourhood principle 24. Facilitate the sustained investment in digital infrastructure to support the city's digital economy | <i>2021 onwards</i> <i>2021-2023</i> <i>2021-2023</i> <i>2021-2023</i> <i>2021-2023</i> |
| Maintain Edinburgh's place as a global city | <ol style="list-style-type: none"> 25. Support partners in revising the Edinburgh Tourism Action Plan 26. Continue to support the arts and cultural sector and contribute to its stabilisation and retention. 27. Promote key sites in the city to increase inward investment 28. Use business support services and networks to help Edinburgh businesses to trade internationally 29. Maximise structural capital funding opportunities for Edinburgh's investment portfolio 30. Promote Edinburgh as a destination for international talent, students, and skilled workers 31. Explore investment options on what the income from a Transient Visit Levy could support. | <i>2021 onwards</i> <i>In place & ongoing</i> <i>2021-2023</i> <i>2021-2023</i> <i>2021 onwards</i> <i>2021-2023</i> <i>2021-2023</i> |

1. Introduction

The need for a new approach

In June 2018, the City of Edinburgh Council approved the Edinburgh Economic Strategy and a programme of work to enable good growth for Edinburgh's economy.

In December 2020 a review and refresh of this strategy was proposed in response to new significant challenges facing the city. This process aims to ensure that the city's economic priorities continue to meet the needs of citizens and businesses and drive a successful recover from the economic effects of the Covid 19 pandemic, the UK's withdrawal from the EU, and other economic changes anticipated in the coming few years.

The purpose of this report is to set out the findings of the first stage of this strategy refresh process outlining:

- The new challenges the city faces in recovery and renewal from the pandemic
- The strengths and opportunities the city economy can build on over the next few years
- The core priorities from the 2018 strategy which remain vital to the city's economic success, and
- The new priorities and actions the city needs to develop in response to a new context.

The paper provides a **framework for consultation and development** with citizens and partners over the coming months, the findings of which will inform the drafting of a refreshed Edinburgh Economy Strategy for publication in November 2021.

A developing City-wide policy context

Alongside the emergence of new economic challenges for the city, the past two years have also seen significant developments in the policy context within which the city operates.



2020 saw the publication of the 2050 Edinburgh City Vision project, which built on two years of consultation with city residents to identify their ambitions for the future of the city. Those findings identified an aspiration for Edinburgh to be a **Welcoming, Fair, Thriving, and Inspiring City**.

Alongside this, in 2021 City of Edinburgh Council published a new **Council Business Plan** setting out its priorities for the coming three years. The plan describes the Council's broader approach to recovery from the pandemic and meeting its key priorities to **end poverty, become a net zero city, and ensure wellbeing and equalities** are enhanced for all.



The refreshed Edinburgh Economy Strategy will form one part of a suite of key strategies needed to deliver this business plan, complementing and integrating with the Edinburgh 2030 climate strategy, City Plan 2030, City Mobility Plan, End Poverty in Edinburgh Delivery Plan and other frameworks.

The process



The refresh of the Edinburgh Economy Strategy is being taken forward across three phases of work:

- **Scoping** – this phase of work ran from January to June 2021 and involved analysis of the city’s economic context, data gathering, and initial consultations with key city partners. This paper represents the output from this work, with a summary of key challenges to be addressed and a framework for ongoing consultation.
- **Consultation** – this phase of work will run from June to September 2021. This phase will seek to gather views and insights on the framework proposed in this paper. Details on this consultation process are outlined below.
- **Publication** – Findings from the consultation phase will inform development of a refreshed Edinburgh Economy Strategy in November 2021.

Next steps and consultation process

Over the next few months the Council will launch a number of consultation activities designed to gather input from citizens, businesses, and city stakeholders on the framework proposed in this paper. The process will aim to ensure that the priorities and actions the Council takes over the next few years meet the needs of the city economy in recovery and renewal from the pandemic.

Consultation and insight gathering activities to be carried out over June to September 2021 will include:

- Online consultation open to all citizens, community groups, businesses and other stakeholders through the Edinburgh Consultation Hub.
- Cross party workshops with City of Edinburgh Council elected members
- A survey of city businesses about their future plans and expectations for office utilisation and home or remote working plans.
- Workshops with city business on key aspects of the consultation framework.
- Bespoke engagement and discussion events on key aspects of the challenges facing the city.

In parallel with these activities, officers will be seeking opportunities to engage with and gather views from business networks, community groups, and other interested forums across the city. Work carried out in consultation for this strategy will also be informed by other consultation activity carried out by the Council and partners during this period, including that undertaken for other key city strategies such as the Edinburgh 2030 Climate Strategy.

Key questions for consideration through this process are outlined throughout this document.



The Process so far

This Economy Strategy Development paper was prepared in response to insights and information gathered through a review of key datasets, research and analysis, and a series of scoping discussions carried out during the period January to June 2021. Key sources and documents reviewed through this process have included:

- Discussion and workshops with the Council's Economic Advisory Panel
- 1 to 1 interviews with Advisory Panel Members and other stakeholders
- Discussions and workshops with other stakeholder groups, such as Edinburgh Tourism Action Group, the Edinburgh and South East Scotland City Region Deal Oversight Group, and the Edinburgh International Group
- Edinburgh Business Resilience Group (EBRG) Interim Report in published in April 2021
- Economic and Fiscal Forecasts, published by the Scottish Fiscal Commission
- Skills Development Scotland, Regional Skills Assessments, March 2021
- Scottish Enterprise Monthly Economic Commentary
- Fraser of Allander Institute Scottish Cities Outlook: an Update May 2021
- Edinburgh Poverty Commission Final Report, September 2020
- Edinburgh Climate Commission report - Forward, Faster, Together: Recommendations for a Green Economic Recovery in Edinburgh, June 2020.



2. A new context for Edinburgh's Economy

This section sets out the changing context to which a refreshed Edinburgh Economy strategy needs to respond. In particular, the analysis considers:



In doing so, this section concludes by summarising the new priorities the city needs to adopt for recovery and renewal, as well as highlighting the existing priorities that remain important for Edinburgh to have a fair and thriving city economy.

Facing the Economic storm

Edinburgh's economy will face its biggest challenge for a generation during the early part of this new decade.

Slow recovery and increasing risk of insolvency...

Scotland's economy contracted by 9.5% during 2020, with much of this decline driven by sectors - such as retail, hospitality, leisure and business tourism - upon which Edinburgh has historically had a strong reliance.

Estimates from the Scottish Fiscal Commission show that, without intervention or stimulus, Scotland's economic output will not return to pre-

pandemic levels until the beginning of 2024, and it could be 2026 before the economy recovers all the capacity and potential lost during the past year

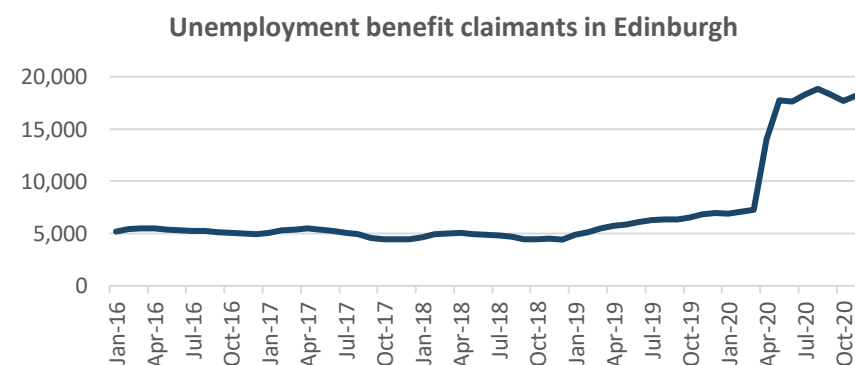
Turnover is down in all business sectors, with the exception of food retail. Analysis by the Royal Bank of Scotland in early 2021 suggested that around 15-20% of Scottish businesses are at moderate to severe risk of insolvency as a result of pandemic. This rate rises to 30% for the hospitality sector.

...Unemployment is quick to rise, but slow to fall...

The UK Government's furlough scheme has played an important part in limiting the impact of the pandemic declines on job numbers. In early spring 2021 almost 39,000 Edinburgh jobs were being still supported by furlough, and estimates show that Edinburgh has accounted for 10% of all furloughed workers in Scotland.

Despite this, the city has still experienced a dramatic increase in the number of people forced out of work and into benefits dependency as a result of the pandemic. By Spring 2021 over 18,000 people in Edinburgh were claiming unemployment related benefits, more than three times the level recorded pre-pandemic.

The lesson from previous recessions is that unemployment rates are slower to return to normal than other economic indicators, and it may be several years before the labour market returns to the conditions that held pre-pandemic.



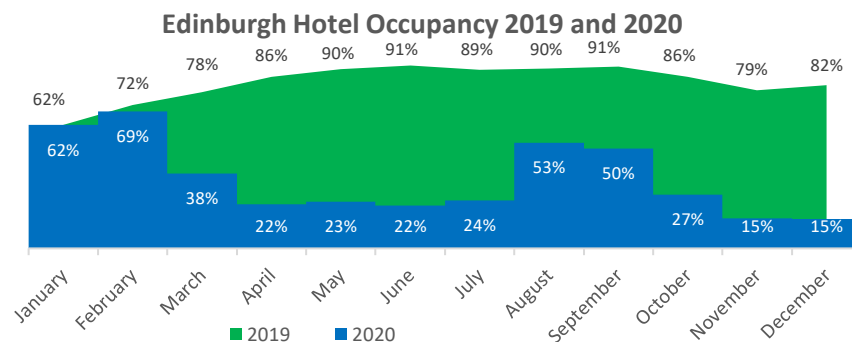
...the city centre has been hard hit and the economic geography of the city region may be changing...

Even at peak periods during the last year footfall in key retail areas in Edinburgh's city centre were almost 50% lower than the same period pre-pandemic.

Over much of the past year visitor numbers to the city centre have fallen significantly and the future for many businesses located there remains uncertain. The impact of the pandemic on the footprint of large and medium sized employers in the city centre is not yet fully understood and could have significant implications for the city centre economy as a whole. As a part of this, more needs to be understood about how the economic geography of the city region is changing post-pandemic, particularly as this relates to future patterns of commuting and work patterns.

...a sharp downturn for the visitor, retail, and hospitality sectors...

Visitors to Edinburgh fell significantly during 2020 severely impacting on sectors such as retail, hospitality and tourism - hotel occupancy rates in the city were down by over 80% at times during 2020. Whilst the summer season saw a boost in domestic tourism activity in rural areas of Scotland, in Edinburgh much of 2020 visitor numbers were significantly down on past trends. The fall in visitors meant that many consumer facing services also suffered disproportionately due to indoor venues being one of the last areas to reopen.



...increasing inequality...

One of the clearest impacts of the pandemic and its economic effect has been the increase of poverty and inequality. Edinburgh Poverty Commission estimated that an additional 4,500 people were at risk of falling into poverty during 2021 as a result of the pandemic.

While a substantial proportion of Edinburgh's economy has been able to transition and continue operating through working at home during lockdowns, those in the lowest wage sectors have been most impacted by lost hours, redundancy, or by having to continue to work in difficult conditions.

Women, young people, people with disabilities, those with caring responsibilities, and people working in low paid jobs are all much more likely to have lost income due to the pandemic so far. At the same time, job numbers among people under 24 are falling twice as fast as the workforce as a whole in Edinburgh.

...and the impact of Brexit on trade patterns and labour supply.

Alongside the pandemic, 2021 has also seen the UK's withdrawal from the EU. It will take some time for the medium and longer terms structural changes in trade caused by Brexit to be fully felt and understood. Early evidence, however, does show a drop in exports, with trade levels down for 28% of Scottish exporters in January 2021. At the same time, evidence from Edinburgh Chamber of Commerce report challenges for businesses in adapting to new export regulation, and a related significant drop off in the number of business seeking support for customs declarations.

One key factor noted in discussions related to Brexit has been the potential impact on the supply of labour for key sectors in Edinburgh. Latest data do show challenging trends in this area, with the number of overseas nationals registering for work in Edinburgh falling by 63% in 2020. As with other factors, including international student flows, considerable uncertainty remains over the long-term trends for such workers during the post pandemic recovery period.

Long term continuing challenges

These new pressures arising from the pandemic and Brexit come in addition to the long-term challenges identified and discussed in the **2018 Edinburgh Economy Strategy**.

In developing a new, refreshed approach which meets the needs of the current crisis, long term responses also need to respond to challenges which have been highlighted before and remain critical to the city's future prosperity.

Long term challenges identified in the 2018 Edinburgh Economy Strategy, and which remain important to address in 2021 and beyond...

Low pay and
income insecurity

The need for fair
work

Skills and career
progression
opportunities

Productivity and
competitiveness

Transition to a
digital economy

Just transition to a
net zero economy

The future of
retail and the city
centre

Need for flexible,
fit for purpose
workspaces

Strengths to build on

Despite these challenges Edinburgh remains well placed to make a successful recovery from pandemic and recession. The core strengths which have helped the city recover from previous recessions remain in place. At the same time, analysis from Oxford Economics suggested that Edinburgh was the most resilient economy in Scotland, driven by good digital connectivity and economic diversity.

Over the next few years, the success of the city's recovery will rest on its ability to build on and maintain key strengths such as:

- A highly skilled and flexible workforce
- A young, diverse, and growing population
- Core, globally competitive industries in finance, leisure and business tourism, and culture
- A knowledge-based economy, driven by significant strengths in Data Driven Innovation committed to be the Data Capital of Europe
- Major competitive advantages in key technology sector clusters, including Fintech.
- Internationally leading higher education and research institutions
- A City Region Deal delivering investment and job creation over the next 15 years
- A strong global reputation and status as a historic capital city
- A thriving voluntary and social enterprise sector
- A strong pipeline of infrastructure investment planned for the next 18 months
- World leading investment opportunities in every part of the city
- A city-wide commitment to delivering net zero by 2030, and the investment opportunities which arise from that.

Major infrastructure projects delivering in Edinburgh during 2021 and 2022

The **St James Quarter** is a £1bn development replacing the 1960s St James Centre and New St Andrews House office block at the east end of Princes Street. The complex will have space for 80 shops and 30 restaurants, along with an Everyman cinema and 152 residential apartments. Opening of the complex starts in early summer 2021.

A new **visitor attraction and entertainment venue** is being built into the former House of Fraser building at the west end of Princes Street. Due to open in July 2021. The former B-listed department store is part of **Diageo's £150m investment Johnnie Walker brand**

A new 13,500 m² or £68 million development at the expanding **Bioquarter** district in Edinburgh will be completed in 2022. It will host the **Usher Institute for Population Health** sciences, which is one of the **four data driven innovation hubs** in the city. This will provide a base for members including the **Edinburgh Clinical Trials Unit**, partners and for start-up companies working in the field of data-driven innovation in health and social care.

Restoration of the **Old Royal Infirmary of Edinburgh** on Lauriston Place into a work hub for the Edinburgh Futures Institute will open in 2021. The renovation of a Category-A Listed building will provide 21,300 m² of floor space and provide new teaching, event spaces, major lecture halls, and meeting rooms.

Meadowbank new sport facility will complete its £45 million redevelopment and open late in 2021.

National Galleries of Scotland refurbishment was a £22m project to redesign the entrance and gallery and re-landscape **East Princes Street Gardens** is due for completion in 2022.

A £40 million repair of **North Bridge** originally build in 1897 that connects the two World Heritage sites of Edinburgh is to be completed in 2022. A redesign of the major junction at **Picardy Place**, this will include a tram stop, bus interchange and is situated next to the new St James Quarter and at the top of Leith Walk. The cost of the project was just under £50 million and will be completed in October 2022.

Within the next 18 months there will also be significant development progress made in securing a developer to continue the redevelopment of **Fountainbridge** area of the city. Construction will also begin at **Powderhall** that will see the restoration of the former stable block into flexible workspace and artist studios, a new early year centre with older persons housing, and up to 200 affordable houses added to the area. In **Meadowbank** further site development will start in 2022 building 600 homes and commercial and community premises such as a GP surgery. In Edinburgh's **Haymarket** work delivering a £350m development will continue to transform a brownfield site in the West of the city. It will include a hotel will be operated by the Edinburgh International Conference Centre (EICC) expected to open in 2023. The site will also have three office blocks and shops. Construction will continue delivering a new £200 million expansion of the **Edinburgh tram network** from the city centre to Newhaven and will open in 2023. **Granton waterfront development** will consist of a £1.3 billion development and first phases of construction will begin in 2022 producing over 400 homes.

Existing Council commitments to recovery

In parallel with the development of these priorities, the past year has also seen the Council commit to significant actions to provide immediate and short-term support for business recovery during the pandemic. Throughout the next stages of the city's recovery the Council will continue to deliver, operate and fund a range services and initiatives. This includes but is not limited to:

- the continued delivery of business support through in house business advisors and managing and funding employability services. In the last year over 3,800 Business Gateway client engagements and more than 1,300 clients were supported into work and learning;
- the continued management and processing applications for crisis support, which during 2020 totalled over 8,000 applications for crisis support, a 76% increase on the same period in 2019;
- regulatory and transactions service continuing to process millions of pounds worth of new business grants to support city businesses and the economy. In the last year the Council processed around £200 million worth of grants;
- leading in the design and delivery of the new Edinburgh Youth Guarantee with an allocation of over £1.9 million for 2021/22;
- delivering a new 2021/22 budget on 18 February 2021, to add further £0.4 million to help people at risk of homelessness and support those experiencing homelessness into secure tenancies;
- funding for the new marketing campaign Forever Edinburgh, which was delivered jointly by the City of Edinburgh Council, ETAG and Visit Scotland;
- providing additional funding of £500,000 for Edinburgh's summer festivals to support the recovery of the city's creative economy for performers, production support and the wider sector supply chain
- supporting the opening of new major infrastructure developments in Edinburgh such as the Edinburgh St James Quarter for the Summer 2021.

Bringing it all together

Taken together, these findings suggest a number of new core issues a refreshed Edinburgh Economy Strategy needs to deliver against in order to remain relevant and fit for purpose. they also suggest a number of existing priorities which remain relevant and important for the city's future success.

In order to respond to the challenges posed by 2020/21, the city needs to:

- Intervene to support business recovery and sectors impacted by pandemic
- Ensure the strong recovery of city and town centres.
- Increase emphasis on the city's international role post Brexit
- Increase emphasis on economic opportunities from net zero target
- Increase emphasis on building wellbeing, and the city's resilience to future economic shocks

In doing so, the city needs to continue to implement key long-term priorities set by the 2018 Edinburgh Economy Strategy, including:

- Fair work, and tackling poverty and inequality
- Skills development and career progression
- Entrepreneurship and Data Driven Innovation
- Delivering world class places, and a strong visitor economy

The next section will build on these issues further and propose a framework for strategy development and consultation.

Questions for consultation:

- Does this analysis present a fair and complete analysis of the challenges for Edinburgh's economy? If not, what's missing?
- What key strengths will drive Edinburgh's future recovery?
- What other long-term trends should this analysis consider?

3. A Framework for Consultation

This section presents an outline framework for a refreshed Edinburgh Economy Strategy, built in response to the challenges and strengths highlighted above.

This framework is developed for consultation over the period June to September 2021, with a view to a final strategy publication in November 2021.

In developing the framework, its principles and priorities, specific focus has been made to take advantage of the specific levers and powers for change available to City of Edinburgh Council and its partners.

Levers for change



Strategic Collaborations

To maximise impacts the city needs to make best use of opportunities for collaboration and joint working. The council can through its networks and relationships promote and take advantage of opportunities to implement real change. An example of this approach can be seen in the partnerships

built to develop and implement the Edinburgh and South East Scotland City Region Deal, and the Edinburgh Tourism Action Group.

The Council can also influence strategic investment programmes (including our investment in housebuilding, and the investment provided through the Edinburgh and South East Scotland City Region Deal) to create new supply chains and opportunities for the city's economy.

Delivering infrastructure and services

The Council has the ability to invest and lever investment into key infrastructure in the city centre, including housing, transport, and the built environment. In terms of delivering services the Council also delivers key services that support the economy including business support education and skills, planning and regulation.

Making strategic investments that benefit our communities

The Council can use its considerable spending power to make a positive impact on local businesses and promote net zero and fair work and ensure new contracts are used to maximise community benefits. This approach can generate wider benefits for a local community from the delivery of public contracts or services. These benefits include employment, training, apprenticeships, a strengthened civil society, improvements to the local environment and mitigation of climate risks.

Influence for change

The City Council and other partners also have significant lobbying power as the capital city of Edinburgh to work with Scottish Government on influence policy. This can include increasing the 'sell' of the city across various networks nationally and internationally and promoting the interests of Edinburgh's economy in key areas. It can also include lobbying for additional powers we need as a city to meet the priorities of our citizens and businesses.

Draft priorities for a new strategic approach

Making use of the levers available to the city, the scoping phase of this project has suggested five draft priorities to guide consultation on development of a refreshed Edinburgh Economy Strategy.

To meet the needs of the Edinburgh Economy through recovery, the Council and its partners should aim to deliver **five strategic priorities and 31 actions**



The remainder of this section takes each of these priorities in turn and provides more detail on the draft actions implied for the Council and other city stakeholders.

Questions for consultation:

- Do you think these five proposed priorities are realistic, or ambitious enough, given the challenges the city faces in recovery from pandemic?
- Do they recognise the city's opportunities and strengths?
- Do the actions outlined in the sections below meet the needs of the city in recovery from pandemic?
- If not, what would you add or change?

Draft priorities and actions for consultation

Timeframe

| | | |
|--|--|--|
| Help businesses to innovate and adapt | <p>32. Support continued access to UKG/SG business support schemes.</p> <p>33. Ensure Business Gateway and local business support is fit for purpose</p> <p>34. Enable access to vacant sites in the city, including the city centre</p> <p>35. Ensure licensing, regulation and planning systems create spaces for all businesses to thrive</p> <p>36. Adopt the Logan Review recommendations for investment in tech infrastructure in Edinburgh</p> <p>37. Support development of Edinburgh innovation ecosystem to be on par with the best in Europe</p> | <p><i>In place & ongoing</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> <p><i>2021 onwards</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> |
| Promote access to fair work and opportunities for people to progress | <p>38. Become a Fair work City and promote Living Wage accreditation for businesses across the city.</p> <p>39. Apply the Fair Work first in procurement principle to every tender</p> <p>40. Maximise the community wealth building opportunities from city investments.</p> <p>41. Ensure flexibility and improved access to skills and retraining opportunities</p> <p>42. Support all individuals with barriers to employment with Edinburgh Guarantee.</p> | <p><i>2021 onwards</i></p> <p><i>In place & ongoing</i></p> <p><i>2021 onwards</i></p> <p><i>2021-2023</i></p> <p><i>In place & ongoing</i></p> |
| Lead a just transition to a net zero economy | <p>43. Agree and deliver an Edinburgh 2030 Climate Strategy.</p> <p>44. Connect net zero investment to opportunity</p> <p>45. Support Edinburgh Climate Compact to increase business commitment to reduce emissions</p> <p>46. Embed net zero into the city's business support offering</p> <p>47. Explore a green innovation challenge finance scheme</p> <p>48. Deliver Net Zero Procurement by 2030</p> <p>49. Promote Edinburgh's circular economy</p> <p>50. Net zero skills and workforce development</p> | <p><i>2021 onwards</i></p> <p><i>2021-2023</i></p> <p><i>2021-2030</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> <p><i>2021-2030</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> |
| Create vibrant places for businesses and people | <p>51. Working with partners to develop a City Centre Recovery Plan.</p> <p>52. Transform Edinburgh's Waterfront into one of the city's landmarks and enhance the economic value of Port infrastructure</p> <p>53. Roll out our place-based development and investment programme</p> <p>54. Deliver high quality, sustainable, mixed used housing developments under the 20-minute neighbourhood principle</p> <p>55. Facilitate the sustained investment in digital infrastructure to support the city's digital economy</p> | <p><i>2021 onwards</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> |
| Maintain Edinburgh's place as a global city | <p>56. Support partners in revising the Edinburgh Tourism Action Plan</p> <p>57. Continue to support the arts and cultural sector and contribute to its stabilisation and retention.</p> <p>58. Promote key sites in the city to increase inward investment</p> <p>59. Use business support services and networks to help Edinburgh businesses to trade internationally</p> <p>60. Maximise structural capital funding opportunities for Edinburgh's investment portfolio</p> <p>61. Promote Edinburgh as a destination for international talent, students, and skilled workers</p> <p>62. Explore investment options on what the income from a Transient Visit Levy could support.</p> | <p><i>2021 onwards</i></p> <p><i>In place & ongoing</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> <p><i>2021 onwards</i></p> <p><i>2021-2023</i></p> <p><i>2021-2023</i></p> |

Priority 1: Help businesses to innovate and adapt

As a consequence of the pandemic many businesses in Edinburgh are facing rising risk of insolvency and taking on additional debt to survive. To help business survive, adapt, and recover we need to act now to ensure businesses can access the support and assistance that is right for them.

Our growth and recovery also depends on building on the success of our strong entrepreneurship ecosystem. This means identifying the key innovation clusters where Edinburgh has a real competitive advantage, investing in the infrastructure needed to support innovation and growth (such as digital infrastructure, and physical co-location environments for start-ups), investment in education and talent, and ensuring businesses have the opportunity to access grant, public and private financing for innovation, recovery, and growth.

These elements of this draft strategic approach are important to support Edinburgh businesses return to a strong position over the next few years. But they are critical to other aspects of the framework too. Without a thriving business sector, Edinburgh's economy will not provide the good jobs, and fulfilling careers we need to tackle the unemployment and inequality challenges the city faces.

Actions

1. Support continued access to UKG/SG business support schemes.

Accessing finance without further increasing debt may be the biggest challenge many businesses in Edinburgh will face during recovery. A key part of addressing this will involve ensuring employers have access to the right sources of finance to increase their resilience and support their ability to continue to trade in a challenging environment.

2. Ensure Business Gateway and local business support is fit for purpose.

This means we will support all companies who are facing challenges and direct them seamlessly to right contact and the right support. The Council through its business support service and working with partners

will provide support for businesses that want grow, create quality jobs, become more sustainable and to export and trade internationally.

3. Enable access to vacant sites, including the city centre, for collaborative spaces grow companies and support local independent businesses.

This will ensure we revitalise our communities and promote the 20-minute neighbourhood agenda for businesses. This may include supporting the creation of new local hubs for new business start-ups and also encourage more local and independent businesses to the city centre.

4. Ensure licensing, regulation and planning decisions are innovative and creates spaces for local businesses to thrive.

This is about ensuring that the Council is an enabler for business and will include the provision for local businesses to access more flexible and bespoke facilities to better utilise outdoor spaces. This will ensure for example that the benefits created from by our event and festivals seasons are available to a larger range of businesses. It also means continuing to improve the performance of planning and regulatory services in Edinburgh.

5. Accept and adopt the Logan Review recommendations for Edinburgh.

This will establish a Tech scaler project in Edinburgh and facilitate greater investment in infrastructure for the tech sector in addition to supporting the further development of tech skills.

6. Support development of Edinburgh's innovation ecosystem to be on par with the best in Europe.

This means building on Edinburgh status as the Data Capital of Europe and maximising the impact of the Data Driven Innovation investments being brought forward through the City Region Deal. We will build new partnershipsto bring pace, clarity and integration to our innovation ecosystem.

Questions for Consultation

- What do businesses need from the city's business support networks during recovery?
- What is the next big change we need to make in development of the city's innovation ecosystem?

Priority 2: Promote access to fair work and opportunities for people to progress

The experience of the pandemic has highlighted the importance of **fair work, fair wages, and income security** for workers in all sectors across the UK. As well as supporting businesses to survive and recover from the impacts of pandemic, it is important that Edinburgh's recovery supports a continued improvement in working conditions for people employed here.

This means action is needed to help businesses adopt fair work practices and celebrate successes and the impact of good practice where it happens. It means a key role for anchor institutions in the city, including the Council, to lead on ensuring spending and investment is used to promote fair work, and living wages. It also means an adoption of **Community Wealth Building** principles to make sure the major investment projects planned in the city create real impacts for communities across Edinburgh.

Universities and colleges in the city have a crucial role to play in increasing access to learning such as acquiring new digital skills, retraining and upskilling residents and workers. New skills will be required at a much higher frequency than before as jobs continue to evolve at a rapid pace and new technology, new sectors, and new ways of working emerge.

Actions

- 7. Become a Fair work City and promote Living Wage accreditation for businesses across the city.** The Council will work with private sector partners, anchor institutions and Trade Unions to achieve accreditation as a Living Wage City and promote the use of fair work practices such as 'living hours' throughout the city economy.
- 8. Apply the Fair work first in procurement principle to every tender.** This means that the Council will seek to apply Fair work criteria to every tender and apply appropriate weightings in the evaluation of tenders. This will lead to increasing the number of more socially responsible businesses delivering Council contracts and an increase in supplier living wage accreditation.
- 9. Maximise the community wealth building, and community benefit opportunities from city investments.** This means that Council will engage, define and include community benefits, such as apprenticeships and skills programmes in regulated procurements which are proportionate to the type and term of contract. We need to challenge the city to work more collaboratively in maximising the community wealth building opportunities from investments made by the Council and other major public and private anchor institutions.
- 10. Ensure flexibility and improved access to skills and retraining opportunities.** The Council will work in partnership to ensure that Universities and Colleges in the city can offer flexibility, and access for all residents. This would provide retraining and upskilling support for residents and workers of all ages and for those at different stages of their career to ensure they have the right opportunities.
- 11. Support all individuals with barriers to employment through widening the provision of all employability support programmes under the Edinburgh Guarantee.**
This means the Council will provide support to all people with barriers to employment. This will help provide greater support to young people, women returners and vulnerable individuals to enter and sustain work or learning. The service will identify the underlying causes of worklessness and increase the impact of local employability services, drawing on professional expertise to focus on areas of intense need.

Questions for Consultation

- How can we promote fair work and living wage at a time when businesses are struggling?
- What more can we do as a city to create meaningful career progression opportunities in Edinburgh?

Priority 3: Lead a just transition to a net zero economy

A recovery that makes significant gains towards a net zero economy represents an opportunity for Edinburgh to establish a clear advantage over competitor cities and cementing the future of the key sectors **in green tourism; green finance and green festivals**. Many jobs will be created from emerging low carbon sectors over the next decade, not least from the £8.2bn of investment needed to drive our city's transition to net zero. The transition to a net zero economy can also be a key factor in attracting skilled workers, students, researchers, and new investors into the city.

Edinburgh is undergoing significant place development that will see the creation of one of the largest waterfront developments in Europe at Granton. This will increase the concentration of affordable and high-quality sustainable homes in the city. Other key developments supporting the shift to a lower carbon city include the Port of Leith moving to greener infrastructure, the City Trams extension to be completed by 2023, and further investment in new cycle pathways to support more sustainable, accessible and safe travel options for those moving around the city.

Actions

- 12. Agree and deliver an Edinburgh 2030 Climate Strategy.** This will include a set of deliverable actions to help the city achieve its target of being net zero by 2030.
- 13. Connect net zero investment to opportunity.** Develop a mechanism for connecting those looking to invest in a net zero city with the businesses and organisations looking to drive change that supports speed and scale of net zero action.
- 14. Encourage take up for the Edinburgh Climate Compact.** Support and encourage city businesses to sign up to the Edinburgh Climate Compact and commit to reduce their emissions.
- 15. Embed net zero into the city's business support offering.** This means the Council embedding net zero, just transition, and circular economy

principles into **Business Gateway** support programmes for new and existing Edinburgh businesses. It also mentions through a **business mentoring support programme** to help employers take practical steps to realign their operations towards becoming net zero.

- 16. Explore a green innovation challenge finance scheme.** This will include investigating the feasibility of new net zero economy funds and an improved understanding of what funding exists already and identifying any gaps. This will be aimed at stimulating new more sustainable markets and incentivising Edinburgh businesses to adopt more sustainable ways of working.
- 17. Deliver Net Zero Procurement by 2030.** This means aiming to secure commitment from public sector partners across Edinburgh to use procurement spending powers in support the transition to net zero and promote a circular economy. It also means aiming to ensure that, where possible and appropriate, all public sector all investment and purchase decisions are net zero by 2030.
- 18. Promote Edinburgh's circular economy.** Increase participation in the Circular Edinburgh programme which supports businesses to reduce, re-use and recycle as part of embedding circular economy principles.
- 19. Net zero skills and workforce development.** Scope skill needs and align workforce development programmes to meet the needs of net zero businesses, and to promote accessibility of good career opportunities.

Questions for Consultation

- How can we encourage business of all sizes to commit to schemes like the Edinburgh Climate Compact?
- What support or incentives are needed to help businesses adapt to circular economy and climate ready business practices?
- What do we need to do to help businesses have the confidence they need to invest in net zero opportunities?

Priority 4: Create vibrant places for business and people

As a growing city Edinburgh should continue to be a welcoming place ensuring that everyone who live, work, study and visits here can participate in all the city has to offer.

The period of pandemic lockdown has accelerated a number of long-term changing trends in the way people live, shop, and work in cities like Edinburgh. Even in reopening, many businesses may choose to continue to operate remote working practices for at least some of the time, resulting in uncertainty over office related footfall in the city centre. Alongside increased online retail and an increase in 'shop local' patterns, these trends mean that Edinburgh's city and town centre cities must look to how they remain attractive destinations for shoppers, visitors, and businesses.

To respond to these challenges, the city's recovery needs a strong plan to support businesses in core areas like the city centre; it needs continued investment in key strategic development sites across the city; and it needs fundamental changes to reflect new ways of living and working in the city and its communities.

Actions

- 20. Work with partners to develop a City Centre Recovery Plan.** Recovery for the city centre is crucial to economic recovery of the city as a whole. A draft City Centre Action Plan will be consulted on in the Summer to Autumn period of 2021. This will be developed further with partners and aims to help drive city centre recovery through city branding and promotion and as well as actions to enable business recovery.
- 21. Transform Edinburgh's Waterfront into one of the city's landmarks, building new affordable and low carbon homes, and enhance the economic value of our Port infrastructure.** This includes preparing an outline business case and sustainable development blueprint to support the Granton Waterfront which will deliver 3,500 new net zero homes and provide 20,000 square metres of new commercial and cultural space.

This includes enhancing Port of Leith's position in the offshore renewables market by enabling further development and investment into the area.

- 22. Roll out our place-based development and investment programme.** This will bring together existing workstream and programme to coordinate activity, identify priority areas for investment and capitalise on synergies. This will include projects such as Fountainbridge, Meadowbank, Powderhall, Edinburgh Bioquarter and West Edinburgh. This will also include completing the Trams to Newhaven project in 2023. These place-based investments will create apprenticeships and jobs, highlight new ways in which we deliver investment through partnership, and transform local centres through regeneration and community benefits.
- 23. Deliver high quality, sustainable, mixed used housing developments under the 20-minute neighbourhood principle.** This means the Council planning services, working with and developers, will ensure that 20-minute Neighbourhood principle is incorporated into planning decisions. This will also enhance good, low carbon employment and business space opportunities in the city. This will also ensure access to open space, such as parks, and in doing so reduce the need for car travel and support thriving local high street across Edinburgh.
- 24. Facilitate the sustained investment in digital infrastructure to support the cities data and digital economy.** This will enable Edinburgh as an already high-tech city to further capitalise on the developments made during the Covid and lockdown and to extend the City's global reach, influence and impact.

Questions for Consultation

- How will experience of recovery from pandemic change people's working patterns across the city region?
- What impacts will these changes have for city businesses?
- How do we build real 20-minute neighbourhoods that create opportunities for businesses and people?

Priority 5: Maintain Edinburgh's place as a global city

2020 brought unprecedented challenges for Edinburgh's globally recognised business and leisure tourism and culture sectors. Visitor numbers reached an all-time low and the disruption to the city's festival and event schedule had a significant impact on city businesses. These impacts continue into 2021, with significant long-term concerns over tourism and international travel.

In response to the managing the uncertainty of the global pandemic and the implications of new trade regulations with other countries much effort is needed to support businesses who depend on the visitors and those businesses wanting to trade and export.

Edinburgh will need to maintain its fundamental strengths in order to remain a resilient, adaptable city capable of responding to the challenges and opportunities emerging from a post COVID-19 and post-Brexit economy. The city will continue as an outward looking international city with a resilient and diverse economy, a city needs to be open to attracting new talent and maintaining and building international connections.

Actions

- 25. Support partners in revising the Edinburgh Tourism Action Plan as part of the city's recovery.** Edinburgh has an opportunity to be a global leader in green tourism (leisure and business) and green festivals to establish a clear advantage over competitor cities.
- 26. Continue to support the city's world class arts and cultural sector.** The Council will work with partners to support the event planning process, ensuring responsive delivery of funding awards, where possible. The Council will also investigate the introduction of apprenticeship models for arts, festivals and culture and will work with Universities to map cultural assets in the city.
- 27. Promote key sites in the city to increase inward investment.** The Council will seek help attract new inward investment, fuel new businesses, and create new jobs in the city through promotion of key sites. Working with

partners the Council will develop an investment prospectus as part of the or a development investment programme.

- 28. Use business support services and networks to help Edinburgh businesses to trade internationally.** Through city partners this will ensure that Edinburgh businesses are able to thrive and take advantage of international co-operation, trade and investment opportunities.
- 29. Maximise structural capital funding opportunities for capital investment projects in the city.** The Council will seek to utilise the availability and access of new structural funding opportunities such as through the UK Government's Levelling-Up Fund, and Shared Prosperity Fund to continue to grow and redevelop the city sustainability.
- 30. Promote Edinburgh as a destination for international talent, students, and skilled workers.** The Council will publish its international strategy in 2021 that will set out to support trade, investment, research, innovation, the visitor economy, and the global sharing of ideas on arts and culture. This includes commitment to ensure that Edinburgh continues to be recognised as a global meeting place for ideas, culture, and innovation, with world class educational, arts and heritage sectors.
- 31. Explore investment options on what the income from a Transient Visit Levy could support in Edinburgh.** Government paused new legislation on granting Council's in Scotland the discretionary power to introduce a transient visitor levy. Revenue from such a scheme could be important for supporting the long-term sustainability of Edinburgh as a destination to visit. Any decision to introduce a TVL in Edinburgh will be subject to further engagement and local political agreement.

Questions for Consultation

- How big a challenge do employers face in attracting skilled workers from overseas post pandemic/Brexit?
- How can we best support tourism and hospitality sectors to recover and create jobs and career opportunities that benefit the whole city?
- What do we need to do to support businesses to thrive in international trade markets post Brexit?

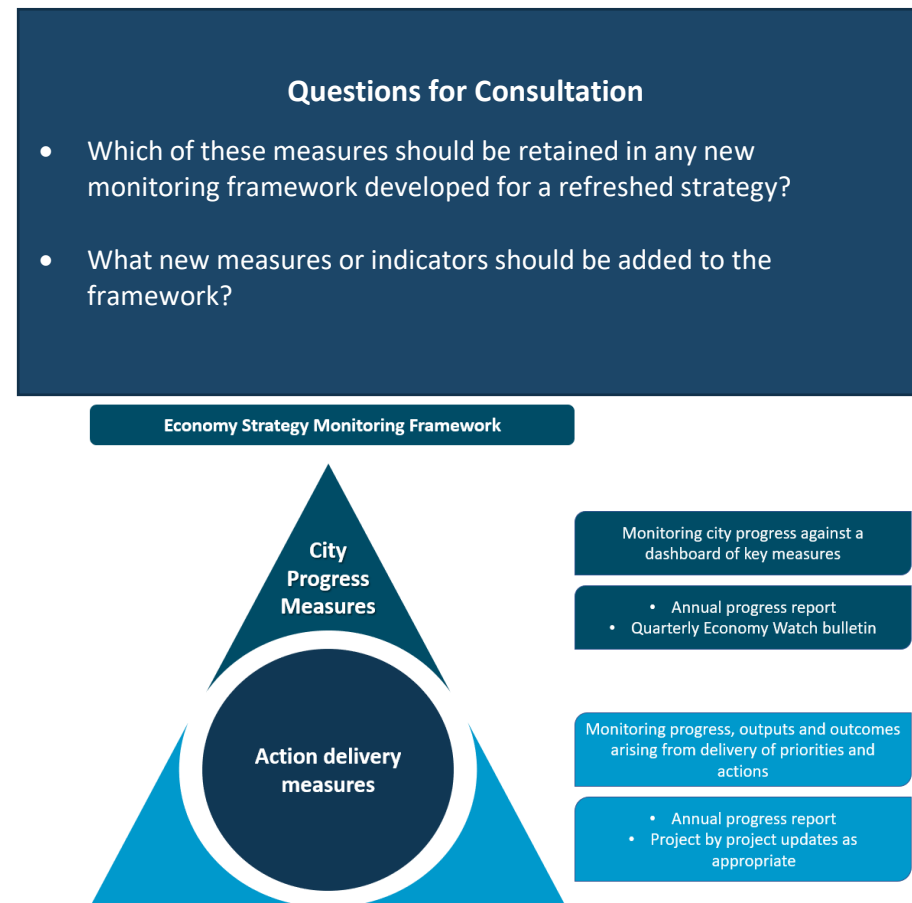
4. Measuring Progress

In order to monitor progress on delivery of the strategy, a two-phase approach will be developed through consultation and engagement with stakeholders over the coming three months. This approach will provide a framework for publication of single annual report to City of Edinburgh Council showing:

- **Progress of the city against a toolkit of key indicators** chosen to track progress towards the aims of the final strategy. Consultation on this toolkit will involve development and improvement of the 'good growth framework' developed for the 2018 Edinburgh Economy Strategy, and
- **Progress towards delivery of specific actions outlined in the final strategy, including analysis of outputs and outcomes arising.** Measures, KPIs, and targets used in this part of the framework will be aligned to and build on approaches used in the Council Annual Performance Framework, incorporating key measures such as outputs and outcomes from employability programmes, from business support programmes, delivery against project milestones and others.

This annual progress report will be supported by reports and updates to committee and partners on a project by project basis where appropriate, and by a quarterly Economy Watch bulletin, providing updates on key statistics relating to the city's economic performance.

The development of this approach will be built on good practice examples from other strategies and research, and on engagement with partners such as Carnegie Trust on incorporating economic wellbeing into the way city's can measure progress and success.



| Examples of potential City Wide Progress Measures | |
|--|---|
| The Good Growth Monitoring Framework developed for the 2018 Edinburgh Economy Strategy will be developed and refreshed as part of the consultations phase of this programme. | |
| Productivity growth | GVA per capita |
| | GVA per hour worked (index, 2016=100) |
| Jobs growth | % change in Employees in employment per annum |
| Earnings growth | Median gross weekly earnings |
| New business births | New business births per 10,000 residents |
| Social Enterprise growth | Number of social enterprises per 10k population |
| Child poverty | % of children living in a low-income household |
| | Gap - highest to lowest ward (percentage points) |
| Claimant Rate | Claimant count rate |
| Financial wellbeing | % of residents who say their financial position has improved in the past 12 months |
| | Gap - highest to lowest ward (percentage points) |
| Low pay | % of workers who earn below the LWF hourly rate |
| Unemployment rate | Unemployed residents as a % of economically active population aged 16-64 |
| | Unemployment gender gap - pc points (male - female) |
| Employment rate | Employed residents as a % of all residents aged 16-64 |
| | Employment rate - gender gap |
| | Ethnic minority employment rate |
| Labour market participation | Economically active residents as % of all residents aged 16-64 |
| | Participation rate - gender gap |
| Worklessness | % of households with no adult in employment |
| Job security | % of residents who feel confident about their job prospects |
| | Gap - highest to lowest ward (percentage points) |
| High skilled workers | % of workers in managerial, professional and technical/scientific occupations SOC 1-3 |
| Job market polarisation | Ratio of workers in high skilled occupations to workers in mid skilled occupations |
| School attainment & positive school leaver destinations | % of all leavers achieving 5 or more awards at SCQF Level 6 or higher |
| | Attainment gap, SIMD 5 to SIMD 1, leavers achieving 5 or more awards at level 6 or higher |
| | % of all school leavers in positive initial destination |

| Examples of potential action delivery measures | |
|--|--|
| Outputs and outcomes from key actions For development as part of the consultation phase of this programme | |
| Businesses supported | No. businesses supported to access UK/SG business support funds |
| | No. businesses supported to start or grow by Edinburgh Business Gateway |
| Fair work and low pay | No. businesses supported towards living wage or fair work accreditations |
| | No. council suppliers who are living wage accredited employers |
| Access to opportunity for work and progression | Value and type of community benefits secured from Council investments |
| | No. and outcomes for people supported by Council funded employability programmes |
| | No. people supported and employers engaged with through Edinburgh Guarantee |
| Net zero economy | No. businesses signed up to Edinburgh Climate Compact |
| | No. businesses supported to net zero actions through Edinburgh Business Gateway |
| | No. businesses participating in business mentoring schemes |
| | Launch and take up of Green innovation challenge finance scheme |
| | No. businesses participating in Circular Edinburgh programmes |
| Placemaking, development and regeneration | Delivery of key milestones and projects for placemaking initiatives |
| | Delivery of development and investment on key strategic sites |
| | Value of funding secured and development supported by UK Shared Prosperity and related funds |

Draft City Centre Recovery Action Plan

June 2021

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Executive Summary

The report provides a proposed framework of immediate and medium-term actions needed for the economic recovery of Edinburgh's city centre.

Edinburgh's city centre and the economic effects of pandemic

Edinburgh's city centre is one of the UK's most vibrant retail, tourism, business tourism, and hospitality destinations. More than a third of all Edinburgh jobs are located in the centre of the city, including more than half of jobs in key sectors such as retail, hospitality, finance and business services, and the area is the core of activity for many of the city's highest profile festival and cultural events.

With such a profile, the economic effects of a pandemic that shutdown retail and hospitality activity, stopped visitor flows, and forced offices to remote working models, have been starker and more visible in the city centre than in any other part of Edinburgh. These impacts have also been seen to accelerate and interact with many long-term challenges facing city centres across the UK – changing retail and working patterns and balancing commercial and residents needs in a vibrant city centre.

Data show that spending in the city centre as at early spring 2021 was only 12% of the level recorded pre-pandemic, while the number of people working in the city centre was only 7% of the pre-pandemic baseline. Taken together, the impact of lost sales, lower footfall, and a drop-in visitor numbers indicate significant challenges for businesses in the area. Consultation evidence gathered to date points to many businesses facing rising risk of insolvency and taking on additional debt to survive.

Actions to drive up footfall, and build a basis for recovery

To address the challenges the city centre faces and build on the opportunities offered by the strong pipeline of investment coming to the area over the next two years, this paper presents a proposed action plan to

guide the work of the Council and its partners. The action plan proposes two core priorities, alongside 24 individual actions and commitments for delivery.

City Centre Recovery Action Plan

Support the city centre to adapt and thrive

- The right support for all businesses
- Targeted and sector specific initiatives

Build momentum for long term recovery

- Marketing and promotional campaigns
- Enhancing and repurposing the city centre

To ensure a strong recovery for Edinburgh's city centre economy, the Council and partners should aim to:

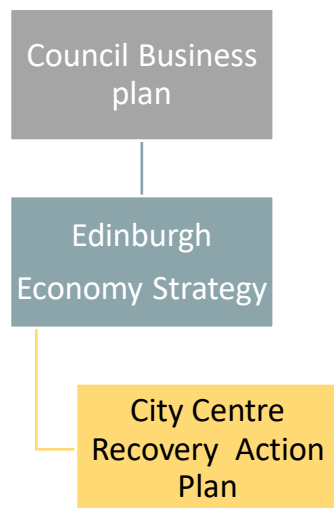
- **Support city centre to adapt and thrive.** Action is needed to provide high impact support to businesses of all sectors, as well as tailored, targeted support to businesses in areas or in sectors under specific pressure. Such support is critical to ensuring that Edinburgh can continue to have a vibrant city centre that creates jobs for citizens, and great experiences for visitors.
- **Build momentum for long term recovery.** The success of Edinburgh city centre's long-term recovery rests on the ability and speed at which the city can drive growth in footfall in the short to medium term. Further action is also needed to enhance and repurpose the city centre to make sure it meets the post-pandemic needs of residents, businesses, and visitors.

Next steps

Further consultation and development of this plan will be undertaken alongside the programme of work for the refresh of the city-wide Edinburgh Economy Strategy. Such activity will take place during June to September 2021, with publication of a final City Centre Recovery Plan in November 2021.

1. Introduction

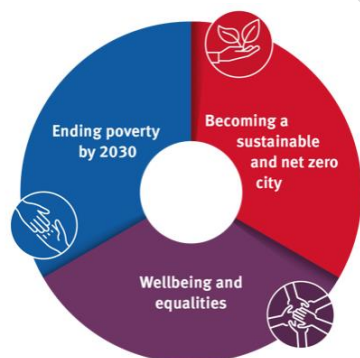
This report provides a draft action plan to support Edinburgh's city centre economy to make a strong recovery from the impacts felt as a result of the Covid-19 pandemic.



The plan has been developed as an accompaniment to the refresh of the city-wide **Edinburgh Economy Strategy**, focusing here on specific actions needed to revive the economy of the city's historic centre.

In doing so, the plan forms part of a golden thread of actions taking forward delivery of the City of Edinburgh Council Business Plan, and the commitments it makes to ensure that *"Edinburgh's economy recovers from recession and supports businesses to thrive"*.

More broadly, the actions included in this plan aim to support delivery of the Council's long-term priorities to **end poverty, become a net zero city, and ensure wellbeing and equalities are enhanced for all**.



The process and timeline

This draft action plan has been developed in consultation with city partners, including discussion and workshops with the Council's Economic Advisory Panel, and 1 to 1 interviews with Advisory Panel Members and other city stakeholders.

Further consultation and development of this plan will be undertaken alongside the programme of work developed for the refresh of the city-wide Edinburgh Economy Strategy. Such activity will take place during June to September 2021, with publication of a final City Centre Recovery Plan in November 2021.

Actions planned during this next consultation phase include:

- A survey of city centre businesses about their future plans and expectations for office utilisation and home or remote working plans
- Workshops with city centre business on key aspects of the draft plan presented here,
- Participation Scottish Cities Alliance workshops to inform Scottish Government support for city centre recovery, and
- Online consultation open to all citizens, community groups, businesses and other stakeholders through the Edinburgh Consultation Hub.



2. The need for a new approach

The Edinburgh Economy Strategy Development Report sets out the challenges facing the city as a whole as a result of the pandemic and its economic effects.

In that analysis the paper notes that businesses in Edinburgh's city centre have felt very specific challenges from falling turnover and changes to tourism, including business tourism, shopping, leisure, and working patterns. The paper, and the strategic framework it proposes, also highlights the importance of the city centre to Edinburgh's long-term economic success – as a magnet for visitors, cultural activity, investment, and innovation.

A strong recovery for Edinburgh's economy as a whole, requires a strong and vibrant city centre.

Edinburgh City Centre – headline statistics



Edinburgh City Centre and the economic impacts of pandemic

Edinburgh's city centre is one of the UK's most vibrant retail, tourism, and hospitality destinations. More than a third of all Edinburgh jobs are located in the centre of the city, including more than half of jobs in key sectors such as retail, hospitality, finance and business services, and the area is the core of activity for many of the city's highest profile festival and cultural events.

With such a profile, the economic effects of a pandemic that shutdown retail and hospitality activity, stopped visitor flows, and forced offices to remote working models, have been starker and more visible in the city centre than in any other part of Edinburgh.

Even as at spring 2021, data provided by the Centre for Cities' [high streets recovery tracker](#) suggested that in the period just prior to the May 2021 move to Level 2 Covid restrictions for most of Scotland:

- Edinburgh city centre sales levels had fallen to 12% of pre-pandemic averages
- The number of people working in the city centre was only 7% of the pre-pandemic baseline
- Weekend city centre visitor numbers were down to 20% of the pre-pandemic baseline, and
- Night time visitors were estimated at 8% of pre-pandemic levels

The evidence of this downturn in activity is further demonstrated by data showing that:

- Hotel occupancy rates in the city were down by over 80% over much of 2020, and
- Edinburgh city centre visitor attraction numbers down by almost 90% during normal peak summer and autumn months compared to 2019.

Taken together, the impact of lost sales, lower footfall, and a drop-in visitor numbers indicate significant challenges for businesses in the area. Consultation evidence gathered to date points to many businesses in Edinburgh's city centre facing rising risk of insolvency and taking on additional debt to survive.

In the face of these challenges, action is needed now to ensure that businesses in the city centre can continue to survive, and build momentum towards a post-pandemic recovery

Longer term challenges

Alongside the impacts of pandemic, the city centre is also facing long term challenges, many of which may have been accelerated or made more visible by the experience of the past year.

Key challenges for Edinburgh, and all town centre across the UK, include:

- **Responding to the growth of online retail.** The growth of online sales and the pandemic have accelerated the closure of many premises in the city centres around the UK. In Edinburgh many recognisable and historic brands have left the high street over the last 1-2 years. A strong city centre economy needs to make sure that Edinburgh's retains a world class retail experience for city residents and visitors.
- **Increased remote working and a changing economic geography.** The longer-term impact of the pandemic on the working patterns of large and medium sized employers in the city centre is not yet fully understood. Office workers in the city centre play a key part in supporting the local economy and changes in the number of people travelling to the area for work could have significant impacts for a wide range of city centre businesses.
- **Balancing commercial and residents needs in a vibrant city centre.** A strong city centre economy needs to be a place that is great to live in, as well as a great place to work and visit. Long term challenges for Edinburgh have included balancing the demands placed on the area by investors, and visitors, along with the needs of city centre residents. With shifting patterns of activity occurring as a result of the pandemic, getting this balance right remains a critical part of the city centre's economic recovery.

Strengths to build on

Despite the challenges Edinburgh's city centre remains well placed to make a successful recovery from pandemic and recession. The core strengths which have helped the city recover from previous recessions remain in place. Over the next few years, the success of the city's recovery will rest on its ability to build on and maintain key strengths.

Edinburgh City Centre – key strengths to build recovery on



Investment as a catalyst for recovery

At the same time, in 2021 Edinburgh City Centre will be the focus of some of the largest and most significant retail, commercial, and tourism developments seen in any UK city centre. Such investments can provide a catalyst for recovery of the area, creating new job opportunities and building momentum needed to drive up footfall and turnover to the benefit of all businesses in the city centre.

The pipeline of projects planned for delivery in Edinburgh City Centre during 2021 to 2023 include:

- The **St James Quarter** is a £1bn development replacing the 1960s St James Centre and New St Andrews House office block at the east end of Princes Street. The complex will have space for 80 shops and 30 restaurants, along with an Everyman cinema and 152 residential apartments. Opening of the complex starts in early summer 2021.
- A new **visitor attraction and entertainment venue** is being built into the former House of Fraser building at the west end of Princes Street. Due to open in July 2021. The former B-listed department store is part of **Diageo's £150m investment Johnnie Walker brand**
- **National Galleries of Scotland** refurbishment is a £22m project to redesign the entrance and gallery and re-landscape **East Princes Street Gardens** is due for completion in 2022.
- A £40 million repair of **North Bridge** originally build in 1897 that connects the two World Heritage sites of Edinburgh is to be completed in 2022.
- A redesign of the major junction at **Picardy Place**, this will include a tram stop, bus interchange and is situated next to the new St James Quarter and at the top of Leith Walk.
- In **Edinburgh's Haymarket** work delivering a £350m development will continue to transform a brownfield site in the West of the city. It will include a hotel will be operated by the Edinburgh International Conference Centre (EICC) expected to open in 2023. The site will also have three office blocks and shops.
- Construction will continue delivering a new £200 million expansion of the **Edinburgh tram network** from the city centre to Newhaven and will open in 2023.

3. Actions for city centre recovery

To address the challenges the city centre faces, and build on the strengths and opportunities highlighted above, this draft action plan provides an outline of actions needed to support the recovery of Edinburgh's city centre economy.

In line with the framework for consultation developed for the over-arching Edinburgh Economy Strategy refresh, these actions aim to focus the use of the key strategic levers for change available to the Council and its partners.

- **Strategic Collaborations** - To maximise impacts the city needs to make best use of opportunities for collaboration and joint working between public sector agencies, businesses and other stakeholders. The Council has a key through its networks and relationships promote and take advantage of opportunities to implement real change.
- **Delivering infrastructure and services.** The Council has the ability to invest and lever investment into key infrastructure in the city centre, including housing, transport, and the built environment. In terms of delivering services the Council also delivers key services that support the city centre economy including business support education and skills, planning and regulation.
- **Making strategic investments.** The Council can use its leverage and influence to ensure that strategic investments create opportunities for local businesses and areas, promote net zero and fair work objectives and utilise community benefits clauses.
- **Influence for change.** The City Council and other partners also have significant lobbying power as the capital city of Edinburgh to work with Scottish Government on influence policy. This can include increasing the 'sell' of the city across various networks nationally and internationally and promoting the interests of Edinburgh's economy in key areas. It can also include lobbying for additional powers we need as a city to meet the priorities of our citizens and businesses.

In building on these levers, this draft action plan proposes two core priorities for the Council and its partners over the next few years, and 25 individual actions and commitments for delivery.

Support the city centre to adapt and thrive

- The right support for all businesses
- Targeted and sector specific initiatives

Build momentum for long term recovery

- Marketing and promotional campaigns
- Enhancing and repurposing the city centre

To ensure a strong recovery for Edinburgh's city centre economy, the Council and partners should aim to:

- **Support the city centre to adapt and thrive.** The economic impacts of pandemic are continuing to put pressure on the ability of businesses to survive in Edinburgh's city centre. Action is needed to provide high impact support to businesses of all sectors, as well as tailored, targeted support to businesses in areas or in sectors under specific pressure. Such support is critical to ensuring that Edinburgh can continue to have a vibrant city centre that creates jobs for citizens, and great experiences for visitors.
- **Build momentum for long term recovery.** The success of Edinburgh city centre's long-term recovery rests on the ability and speed at which the city can drive growth in footfall in the short to medium term. This means strong programmes of promotion and marketing the city centre, as well as taking the steps needed to help people safely return to work in the area. Further action is also needed to enhance and repurpose the city centre to make sure it meets the post-pandemic needs of residents, businesses, and visitors.

Actions for City Centre Recovery

| | | |
|---|--|--------------------|
| Support the city centre to adapt and thrive | Support for all businesses | |
| | 1. Support and promote continued access to UKG/SG business support schemes | In place & ongoing |
| | 2. Ensure Business Gateway and local business support services meet the needs of city centre businesses | 2021-2023 |
| | 3. Ensure licensing, regulation and planning decisions are innovative and creates spaces for all city centre businesses to thrive | 2021 onwards |
| | 4. Increase city centre based apprenticeships using existing partnerships and delivery models | 2021-2023 |
| | 5. Encourage independent businesses to occupy or share joint occupancy of vacant units in the city centre | 2021-2023 |
| | 6. Encourage more city centre businesses to sign up to the Edinburgh Climate Compact | 2021 onwards |
| | 7. Encourage more city centre businesses to support fair work and commit to living wage accreditation | 2021 onwards |
| | Targeted support and sector specific initiatives | |
| | 8. Deliver 'shop local' campaigns/festivals for city centre retailers, with incentives to encourage residents to participate | 2021 onwards |
| | 9. Provide targeted support for less visible city centre areas including Rose Street and Victoria Street. | 2021 onwards |
| Build momentum for long term recovery | 10. Work with businesses from key sectors to better understand specific actions that we can implement to support them | 2021-2023 |
| | 11. Support appropriate use of outdoor space for hospitality and other businesses to operate safely outside | 2021-2023 |
| | Marketing and promotional campaigns to drive up footfall | |
| | 12. Support delivery of the Forever Edinburgh campaign | In place & ongoing |
| | 13. Work with partners in delivering the Edinburgh Tourism Strategy as part of the city's recovery | 2021 onwards |
| | 14. Promote of safety protocols to get office workers back into the city centre | 2021 onwards |
| | 15. Repurpose current empty units for short term uses including animation/city dressing to welcome residents back | 2021-2023 |
| | 16. Subscribe to a city centre digital model tool to improve planning and promotion developments | 2021-2023 |
| | Enhance and repurpose the city centre to drive recovery | |
| | 17. Deliver the City Centre Transformation Programme towards the recovery and adaptation of the city centre | 2021-2023 |
| | 18. Commission research to understand post-pandemic issues in real estate, land use, retail, tourism, festival and heritage | 2021-2023 |
| | 19. Work with partners to complete the Waverley station masterplan and move to phased delivery. | 2021-2023 |
| | 20. Complete the George Street improvement scheme, the city centre west to east cycle link, and others that improve inclusivity, accessibility and connectivity. | 2021-2023 |
| | 21. Create new, high quality urban environments on a permanent basis | 2021-2023 |
| | 22. Finalise the Waverley Valley Masterplan, and a revised design for Princes Street | 2021-2023 |
| | 23. Support the residential environment in the city centre through use of available powers to control short term lets markets | 2021-2023 |
| | 24. Establish a Smart city centre operation centre in Edinburgh to better manage assets, resources and services efficiently, and use data to better improve the operations across the city and city centre | 2021-2023 |