



**Argyll and Bute Council**  
**Comhairle Earra-Ghàidheal Agus Bhòid**

*Customer Services*  
*Executive Director: Douglas Hendry*

*Kilmory, Lochgilphead, PA31 8RT*  
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*22 May 2018*

**NOTICE OF MEETING**

A meeting of the **ARGYLL ISLANDS STRATEGIC GROUP** will be held in the **COUNCIL CHAMBERS, KILMORY, LOCHGILPHEAD** on **TUESDAY, 29 MAY 2018** at **2:00 PM**, which you are requested to attend.

Douglas Hendry  
Executive Director of Customer Services

**BUSINESS**

- 1. WELCOME AND APOLOGIES**
- 2. DECLARATIONS OF INTEREST**
- 3. MINUTE OF PREVIOUS MEETING HELD ON 27 MARCH 2018** (Pages 3 - 8)
- 4. INTRODUCTION OF/UPDATE ON SCOTTISH GOVERNMENT ISLAND LIAISON DIRECTORS**  
Verbal Update by Chief Executive
- 5. UPDATE ON NATIONAL ISLANDS GROUP MEETING**  
Verbal Update by Chief Executive
- 6. UPDATE ON ISLANDS TRANSPORT GROUP**  
Verbal Update by Executive Director of Development and Infrastructure Services
- 7. ISLANDS (SCOTLAND) BILL UPDATE** (Pages 9 - 14)  
Report by Executive Director of Development and Infrastructure Services
- 8. TRANSPORT SCOTLAND'S VESSEL REPLACEMENT AND DEPLOYMENT PLAN**  
(Pages 15 - 18)  
Report by Executive Director of Development and Infrastructure Services
- 9. ISLAY AND JURA SUMMIT UPDATE** (Pages 19 - 32)

Report by Executive Director of Development and Infrastructure Services

## **10. NEXT AND FUTURE MEETINGS - TO FOLLOW**

Report by Executive Director of Development and Infrastructure Services

The next meeting of the Argyll Islands Strategic Group will take place on Tuesday, 28<sup>th</sup> August 2018 within Gigha Village Hall, Isle of Gigha.

### **Argyll Islands Strategic Group**

Councillor Robin Currie (Chair)	Councillor Mary-Jean Devon
Councillor Anne Horn	Councillor Sir Jamie McGrigor
Councillor Yvonne McNeilly	Councillor Jean Moffat
Councillor Aileen Morton	Councillor Elaine Robertson
Councillor Len Scoullar (Vice-Chair)	Councillor Jim Lynch

Shirley MacLeod, Area Governance Manager

Contact: Lynsey Innis, Senior Committee Assistant; Tel: 01546 604338

**MINUTES of MEETING of ARGYLL ISLANDS STRATEGIC GROUP held in the COUNCIL CHAMBERS, KILMORY, LOCHGILPHEAD on TUESDAY, 27 MARCH 2018**

**Present:** Councillor Robin Currie (Chair)

Councillor Yvonne McNeilly  
Councillor Jean Moffat

Councillor Aileen Morton  
Councillor Elaine Robertson

**Attending:** Shirley MacLeod, Area Governance Manager  
Cleland Sneddon, Chief Executive  
Jim Smith, Head of Roads and Amenity Services  
Fergus Murray, Head of Economic Development and Strategic Transformation  
Stewart Clark, Marine Operations Manager  
Douglas Whyte, Team Leader – East, Community Services  
Alasdair Angus Calder, Housing Officer  
Councillor Jim Findlay  
Councillor Roddy McCuish

**1. WELCOME AND APOLOGIES**

The Chair welcomed everyone to the meeting.

Apologies for absence were intimated on behalf of Councillors Anne Horn, Sir Jamie McGrigor and Len Scoullar.

**2. DECLARATIONS OF INTEREST**

There were no declarations of interest intimated.

**3. MINUTE OF PREVIOUS MEETING HELD ON 9 JANUARY 2018**

The Minute of the meeting of the Argyll Islands Strategic Group held on 9 January 2018, was approved as a true record.

Councillor Currie enquired as to whether the Marine Operation's Manager had fed the concerns of the group in relation to Ferry Freight Fares to the Scottish Government. Mr Clark confirmed that he had, with the Chief Executive confirming that he had had an opportunity to raise the concerns with the Minister for Transport and the Islands at the recent meeting of the Convention of Highlands and Islands (COHI). Mr Sneddon advised that no decision had been taken as yet, and that the Scottish Government were in a difficult position due to financial constraints. Mr Sneddon further advised that COHI leaders had requested that the Scottish Government bring this piece of work to its conclusion soon.

**4. OVERVIEW BY THE SCOTTISH MINISTER FOR TRANSPORT AND THE ISLANDS, HUMZA YUSAF MSP**

The Chair, Councillor Currie advised that an invitation had been extended to the Scottish Minister for Transport and the Islands, Humza Yusaf, MSP to attend this meeting of the group. Councillor Currie advised that due to the extension of the consideration of Stage 2 amendments to the Islands (Scotland) Bill, and the Winter Resilience Bill being considered

by the Parliamentary Committee on Wednesday, 28 March 2018, the Minister had no option but to submit his apologies as he required to prepare for both sessions. The Area Governance Manager further advised that she was working with the Minister's office to establish a more suitable date for the Minister to attend a future meeting of the group, and advised that this would be notified to Members in due course.

Members noted their disappointment that the Minister had not been able to attend.

**5. UPDATE ON PILOT PROJECT FOR SCOTTISH GOVERNMENT ISLAND LIAISON DIRECTORS**

The group gave consideration to a verbal update from the Chief Executive, who advised that the Scottish Civil Service were expected to announce the names of the three senior officers who will take on the role of Island Liaison Directors for Argyll and Bute islands, within the next few weeks. Mr Sneddon hoped to be in a position to introduce them at the next meeting of the group, where they would provide an update in respect of the role they will play over the next eighteen months, noting the need for the work to link directly to and enhance existing CPP structures and areas of work.

**Decision:**

The group agreed to note the information provided.

**6. UPDATE ON ISLANDS STRATEGIC GROUP**

The Chief Executive advised that there had been no formal meeting of the Islands Strategic Group since July 2017. He advised that the meeting which had been scheduled to take place in December 2017 had been postponed due to severe weather and had yet to be rearranged.

**Decision:**

The group agreed to note the information provided.

**7. ISLANDS (SCOTLAND) BILL - UPDATE**

The group gave consideration to a report and a verbal update by the Chief Executive in relation to the Islands (Scotland) Bill. Members noted that consideration of the amendments for Stage 2 of the parliamentary process had been extended, and was due to conclude on Wednesday, 28 March 2018. The Head of Economic Development and Strategic Transformation advised that there had been over 80 amendments lodged and outlined the process for revision and Stage 3 of the Bill with Members noting that Parliament will vote on the Bill at Stage 3.

Discussion took place in respect of island proofing; local plans and the National Islands Transport Group.

**Decision:**

The group agreed that a progress report be brought to the next meeting of the group.

(Ref: Report by Executive Director of Development and Infrastructure Services, dated 27 March 2018, submitted.)

## **8. FUEL POVERTY CONSULTATION - UPDATE REPORT**

The group gave consideration to a report providing an update on the Fuel Poverty Strategy response which the Council had submitted. It also provided an oversight on the issues relating to island areas; funding options and proposed an opportunity for island areas to access further grant funding. Discussion took place in respect of the impact the changing legislation will have on the percentage of homes affected by fuel poverty; the information that will be fed into the Warm Homes Bill and the participation by Argyll and Bute Council in the Scottish Government's Energy Efficiency pilot scheme.

### **Decision:**

The group:-

1. requested that a paper be taken to the September 2018 meeting of the Community Services Committee highlighting the Warm Homes Bill for Scotland;
2. requested that an update on the outcome of the fuel poverty consultation be brought to the August 2018 meeting of the group; and
3. requested that the Area Governance Manager draft a letter to the Scottish Government in consultation with the Chair, highlighting the concerns of the group in relation to the Fuel Poverty consultation.

(Ref: Report by Executive Director of Development and Infrastructure Services, dated 27 March 2018, submitted.)

Councillor Morton left the meeting at 12.30pm.

## **9. TRANSPORT SCOTLAND'S VESSEL REPLACEMENT AND DEPLOYMENT PLAN**

The group gave consideration to a report outlining the progress which has been made against Transport Scotland's ferry service plans to the end of 2016. The report outlined particular points of note, which will have a bearing on the future of the Council's marine infrastructure.

### **Decision:**

The group:

1. noted that Council officers' are working closely with Transport Scotland, CMAL and Calmac to ensure that the goals and priorities identified in the Vessel Replacement and Deployment Plan, in relation to the Council's marine infrastructure, remain achievable; and
2. agreed that this item be carried forward as a standing item on all future agendas.

(Ref: Report by Executive Director of Development and Infrastructure Services, dated 27 March 2018, submitted.)

## 10. AUDIT ON TRANSPORT SCOTLAND'S FERRY SERVICE

The group gave consideration to a report providing Members with a review of the Audit Scotland Report on Transport Scotland's ferry services. The report highlighted the recommendations made therein and examined how the audit findings may have a consequential effect on services provided by the Council. It was noted that a meeting of the Islands Transport Group was due to be held on 28 March, which the Council Leader and Head of Roads and Amenity Services would be participating in. In regard the programme of engagement events planned for the National Transport Strategy, it was noted that the only event planned for Argyll and Bute was to take place in Helensburgh, the Leader was asked to raise this at the meeting on 28 March and request that a consultation genet take place on one of the islands within Argyll and Bute.

### **Decision:**

The group noted that Council officers' will continue to engage with their counterparts in Transport Scotland, CMAL and Calmac to ensure, where appropriate, that full cognizance is given to recommendations made in the report, and agreed that this item should be included on the agenda for discussion at the meeting of the group which the Minister for Transport and the Islands attends.

(Ref: Report by Executive Director of Development and Infrastructure Services, dated 27 March 2018, submitted.)

Councillor McNeilly left the meeting at 1.15pm.

## 11. FUTURE MEETING DATES

The group gave consideration to a report setting out future meeting dates until June 2019 in order to facilitate the development of a work programme and reporting schedule. The report also sought agreement to include a standard item on agendas, when meetings are taking place on islands, which would permit local groups to attend and present to the meeting on their most important local matters and issues.

### **Decision:**

The group:

1. agreed the following programme of meetings:
  - Tuesday, 29 May 2018 in the Council Chambers, Kilmory, Lochgilphead;
  - Tuesday, 28 August 2018 on the Isle of Gigha;
  - Tuesday, 30 October 2018 on the Isle of Lismore;
  - Tuesday, 8 January 2019 in the Council Chambers, Kilmory, Lochgilphead;
  - Tuesday, 26 March 2019 in the Council Chambers, Kilmory, Lochgilphead;
  - Tuesday, 28 May 2019 on the Isle of Luing; and
2. agreed that when meetings are taking place on islands there is a standard item included on the agenda for local groups to attend and present to the meeting on their most important local matters and issues.

(Ref: Report by Executive Director of Customer Services, dated 27 March 2018, submitted.)

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**ARGYLL AND BUTE COUNCIL**

**Argyll Islands Strategic Group**

**Development & Infrastructure  
Services**

**29 May 2018**

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**Islands (Scotland) Bill Update**

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## **1.0 EXECUTIVE SUMMARY**

1.1 This report provides members with an update in regard to the progress of the Islands (Scotland) Bill.

1.2 The Scottish Government Bill was introduced by the Cabinet Secretary for Rural Economy and Connectivity on 9 June 2017. The Bill completed Stage 1 on 8 February 2018 and Stage 2 on 28 March 2018.

## **1.3 RECOMMENDATIONS**

That members consider this update.

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ARGYLL AND BUTE COUNCIL

ARGYLL ISLANDS STRATEGIC  
GROUP

Development and Infrastructure  
Services

29 May 2018

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## Islands (Scotland) Bill – Update

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### 2.0 INTRODUCTION

2.1 This report provides members with an update in regard to the progress of the Islands (Scotland) Bill.

2.2 The Scottish Government Bill was introduced by the Cabinet Secretary for Rural Economy and Connectivity on 9 June 2017. The purpose of the Bill is to:

- make provision for a national islands plan
- to impose duties in relation to island communities on certain public authorities to have regard to island communities (the principle of island proofing)
- to make provision about the electoral representation of island communities
- to establish a licensing scheme in respect of marine development adjacent to inhabited islands.

2.3 The Bill completed Stage 1 on 8 February 2018 and Stage 2 on 28 March 2018.

### 3.0 RECOMMENDATIONS

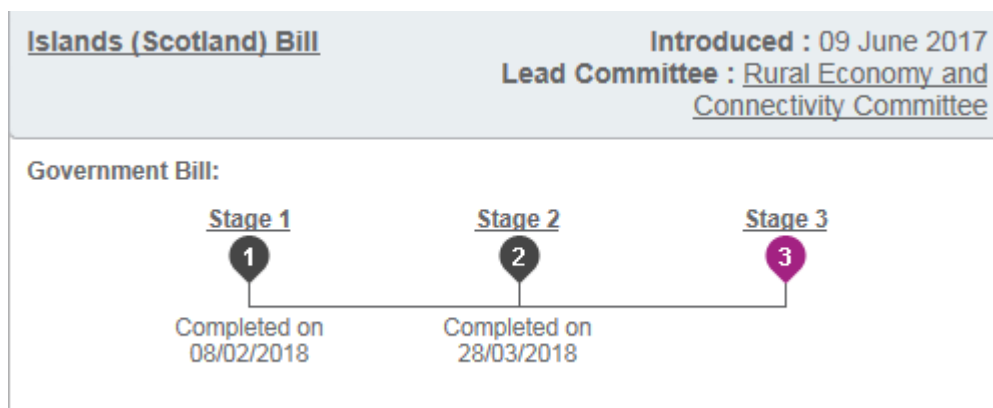
3.1 That members consider this update

### 4.0 DETAIL

4.1 The Scotland (Island) Bill was introduced to Parliament on 9 June 2017. The Bill was assigned to the Rural Economy and Connectivity (REC) Committee for Stage 1 consideration. Following the conclusion of the consideration of evidence, both written and in person, the REC committee published its report on 22 January 2018. <https://sp-bpr-en-prod-cdnep.azureedge.net/published/REC/2018/1/22/Stage-1-Report-on-the-Islands--Scotland--Bill-1/RECS052018R2.pdf>.

The report contained 68 recommendations including the desirability or otherwise of subsidiary island plans.

- 4.2 The Stage 1 plenary debate on the Bill was held on 8<sup>th</sup> of February and the Scottish Parliament unanimously voted for the general principles of the historic Islands Bill.
- 4.3 Amendments to the Bill were lodged week beginning 12 March 2018 and Stage 2 was completed on 28 March 2018. The table below shows the progress of the Bill to date.



- 4.4 The Bill requires public authorities to undertake an island community impact assessment (Section 7) when developing, redeveloping and delivering a policy, a strategy or a service, if it is anticipated to have a significantly different effect on an island community which is significantly different from other communities (including another island community). An island community's impact assessment must contain a description of the differential effect which is anticipated and the authority's assessment of the extent to which development or delivery can be carried out in such a way as to improve or (in the case of potentially adverse effect) mitigate the outcomes for island communities resulting from the policy, strategy or service in question.
- 4.5 The purpose is to ensure the impact of Scotland-wide policies and legislation is understood in relation to island communities, it will also require Councils to screen their own policy, strategy and service delivery decisions in terms of island impacts. Authorities must publish information about how they have complied with this duty under Section 7 in their chosen reporting period of up to a year and also if not preparing an impact assessment, it must publish an explanation. It is for the authority to determine how to publish this information but the Explanatory Notes on the Bill state: *"the intention is that island communities impact assessments will become a normal procedural step in public authorities' decision-making processes, in the manner of the equality impact assessment."*
- 4.6 The Bill also establishes a new licensing regime for Scottish Island Marine Areas, giving legislative responsibility to Island local authorities. A local authority will have to apply for the licensing power and then can licence

development activities offshore for 12 nautical miles. If the licensing regime is not adhered to, local authorities can issue compliance and remediation notices. The Council will have to consider whether to apply for this new power.

- 4.7 Following completion of Stage 2 of the Bill a number of amendments have been made. These can be viewed via the following link and by accessing the Island (Scotland) Bill (as amended at Stage 2). (<https://bb.parliament.scot/Legislation>). Some of the main amendments are highlighted below
- Amendment to definition of island community to include a single uninhabited island or group of islands
  - Specifically name six local authorities under island authority definition (including Argyll and Bute Council)
  - Inclusion of the six local authorities with island interests as *statutory* consultees to the National Islands Plan;
  - Inclusion of consideration of financial implication by Scottish Ministers when preparing island community's impact assessment (ICIA)
- 4.8 The Committee had recommended that the Bill be amended to “make the creation of local authority level island plans a statutory requirement.” However at this time this is not included in the Bill as amended. It was the proposed inclusion of this requirements on each local authority to produce an islands plan that would have introduced an increased cost to the local authority and in turn would have impacted on the Bill's Financial Memorandum. An amendment would have been required to fully reflect the cost of this requirement.
- 4.9 **Next Steps**
- 4.10 Following completion of Stage 2 the final stage is Stage 3. Where the Bill is amended at Stage 2, as is the case in this instance, Stage 3 amendments must relate to the “as amended” version of the Bill. There will be no further chances to amend the Bill after Stage 3 so what goes in the Bill at that point will stay in the Bill.
- 4.11 It is anticipated that Stage 3 of the Islands Bill will be considered at the end of May, at the time of writing the date had still to be confirmed by Parliament.
- 4.12 Discussions are ongoing in regard to issues raised at stage 2 and there may still be changes made to those currently reported.

## 5.0 IMPLICATIONS

- 5.1 Policy – The Bill will ensure island proofing and consideration of island issues in the development of policy, strategy and service delivery

- 5.2 Financial – There will be resource implications as a result of the new legislation. The Financial memorandum will be critical to ensure that any additional resources required as a result of the Bill are in place.
- 5.3 Legal – The legislation will result in the Council having a range of new legal obligations as set out in the Bill (as amended) going forward to Stage 3.
- 5.4 HR – None at this time.
- 5.5 Equalities – The new Bill is designed to have a positive impact on island communities. The acknowledgement by the Rural Economy and Connectivity Committee that the issues which affect islands can also impact on remote and rural mainland areas means that there is also potential for the Scottish Government to take a similar approach to 'island-proofing' for remote rural areas.
- 5.6 Risk – See finance section above.
- 5.7 Customer Service – None at this time.

**Executive Director of Development and Infrastructure Pippa Milne**  
**Policy Lead Cllr Aileen Morton**  
01/5/2018

**For further information contact:** Audrey Martin, Transformation Projects and Regeneration Manager

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ARGYLL AND BUTE COUNCIL

ARGYLL ISLANDS STRATEGIC GROUP

DEVELOPMENT AND  
INFRASTRUCTURE SERVICES

27 MAY 2018

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**TRANSPORT SCOTLAND'S VESSEL REPLACEMENT AND DEPLOYMENT  
PLAN**

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**1.0 EXECUTIVE SUMMARY**

- 1.1 Transport Scotland published their Vessel Replacement and Deployment Plan (VRDP) in February of this year.
- 1.2 This report provides an update on progress regarding the Council's marine infrastructure including the following ports and/or routes:- Port Askaig, Islay; Craignure, Mull; Lismore; Fionnphort to Iona and Tayinloan to Gigha.
- 1.3 It is recommended that Members consider this report.

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ARGYLL AND BUTE COUNCIL

ARGYLL ISLANDS STRATEGIC GROUP

DEVELOPMENT AND  
INFRASTRUCTURE SERVICES

27 MAY 2018

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**TRANSPORT SCOTLAND'S VESSEL REPLACEMENT AND DEPLOYMENT  
PLAN**

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**2.0 INTRODUCTION**

2.1 Transport Scotland published their Vessel Replacement and Deployment Plan (VRDP) annual report in February of this year. This document reports on the progress which has been made against Transport Scotland's ferry service plans to the end of 2016.

**3.0 RECOMMENDATIONS**

3.1 It is recommended that Members consider this report.

**4.0 DETAIL**

4.1 Following the last meeting of the Argyll Islands Strategic Group held on 27<sup>th</sup> March 2018, the Council Leader, Policy Lead for Communities, Housing, Islands and Gaelic and the Head of Roads and Amenity Services participated in the Islands Transport Forum on 28<sup>th</sup> March, this meeting was chaired by Humza Yousaf MSP, Minister for Transport and the Islands. Productive discussions were held on a number of matters relating to islands and transport.

4.2 The Chief Executive, Executive Director of Development and Infrastructure and the Heads of Service for Roads and Amenity and Economic Development and Strategic Transportation attended the Islay/Jura Summit on 4<sup>th</sup> April.

4.3 The Argyll Ferry Infrastructure Group, which includes Transport Scotland, CMAL, Calmac and Argyll and Bute Council are due to meet on 17<sup>th</sup> May. A verbal update will be given on any significant areas of development at the Argyll Islands Strategic Group on 29<sup>th</sup> May.

5.2 Members are advised of the latest update on the Council's marine infrastructure, are as follows:-

5.2.1 Port Askaig – feasibility study in place. Ongoing discussion with Transport



Scotland who have publically indicated that the next vessel to be commissioned for Cal Mac is likely to be similar to the Finlaggan and would be deployed to the Islay crossings. This may negate the need to extend the ferry infrastructure to allow for the 105m vessels. However, this is work in progress and to provide resilience overall TS may wish to continue with larger vessels.

- 5.2.2 Craginure – STAG assessment has been commissioned. As part of this process there will be consultation with stakeholders and members of the public. The purpose of the STAG is to explore all options regarding future berthing, marshalling and car park facilities.
- 5.2.3 Iona/Fionnphort – Tenders now received and being assessed. Award due late April/early May. The initial work is to carry out ground investigation which will inform the design of the amended pier facility and also the provision of a breakwater. These proposals will enable overnight berthing to take place and also provide a degree of shelter/protection in adverse weather conditions.
- 5.2.4 Rothesay – Tenders received for the wave screen and backfilling to the pier area (existing area has voids which is compromising the structural integrity – voids have been formed through wave and water action from the boat propellers and bow thrusters). There will be a communication strategy jointly progressed with Cal Mac and the Council which will detail service matters. The contractor will also host an open day and drop in session to help people better understand the scale and complexity of the works being carried out.

## **6.0 CONCLUSION**

- 6.1 Council officers are working closely with Transport Scotland, CMAL and Calmac to ensure that the goals and priorities identified in the VRDP, in relation to the Council's marine infrastructure, remain achievable.

## **7.0 IMPLICATIONS**

- 7.1 **Policy** Considered to be none directly arising from this report.
- 7.2 **Financial** Fees and charges will have to increase to fund the Council's Marine Asset Management Plan.
- 7.3 **Legal** Considered to be none directly arising from this report.
- 7.4 **HR** Considered to be none directly arising from this report.
- 7.5 **Equalities** Considered to be none directly arising from this report.

- 7.6 Risk** Asset management planning reduces the risk of having to repair and maintain existing infrastructure.
- 7.7 Customer Services** Continued consultation with local communities.

**Executive Director of Development and Infrastructure:** Pippa Milne

**Head of Roads and Amenity Services:** Jim Smith

May 2018

**For further information contact:** Stewart Clark, Marine Operations Manager

Tel: 01546 604893

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**ARGYLL AND BUTE COUNCIL****ARGYLL ISLANDS STRATEGIC GROUP****DEVELOPMENT &  
INFRASTRUCTURE SERVICES****29<sup>th</sup> MAY 2018**

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**ISLAY AND JURA SUMMIT UPDATE**

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**1.0 EXECUTIVE SUMMARY**

- 1.1 The purpose of this report is to update members of the Argyll Islands Strategic Group on the main findings of the Islay and Jura Summit that was held on Islay on the 4th of April 2018 after being called by Brendan O'Hara MP for Argyll and Bute. The event was attended by three Scottish Government cabinet ministers, a significant number of senior officers from the council, public agencies such as HIE, HIAL, Cal Mac and CMal together with community and private sector representatives most notably the tourist and whisky sectors.
- 1.2 The report also identifies the next steps associated with the summit.

**1.3 RECOMMENDATIONS**

It is recommended that the Argyll Islands Strategic Group:-

- 1.3.1 Consider the content of the report.

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**ARGYLL AND BUTE COUNCIL**

**ARGYLL ISLANDS STRATEGIC GROUP**

**DEVELOPMENT &  
INFRASTRUCTURE SERVICES**

**29<sup>th</sup> MAY 2018**

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**ISLAY AND JURA SUMMIT UPDATE**

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**2.0 INTRODUCTION**

2.1 The purpose of this report is to update members of the Argyll Islands Strategic Group on the main findings of the Islay and Jura Summit that was held on Islay on the 4th of April 2018 after been called by Brendan O’Hara MP for Argyll and Bute. The event was attended by three Scottish Government cabinet ministers, the local MSP Mike Russel, a significant number of senior officers from the council, public agencies such as HIE, HIAL, Transport Scotland, Cal Mac and CMal together with community and private sector representatives most notably the tourist and whisky sectors.

2.2 The summit brought together a wide range of highly influential people to meet representatives of the Islay and Jura communities including representatives of the key business sectors of tourism and whisky. A series of presentations were given to provide an economic context for the discussion, to explore potential new investments that could unlock further economic potential on the islands and to understand the further potential for growth and perceived barriers to growth being realised on the islands.

**3.0 RECOMMENDATIONS**

3.1 It is recommended that the Argyll Islands Strategic Group:-

3.1.1 Consider the content of the report.

**4.0 DETAIL**

4.1 Islay and Jura continue to have strong economies with record numbers of tourists coming to the islands combined with a very successful and highly ambitious whisky and gin industry with plans for major expansion in the coming years. The summit was called by Brendan O’Hara the MP for Argyll and Bute in an effort to start a dialogue on how to encourage further this economic growth and address the issues the community has with the capacity of island infrastructure to cope with this expansion.

4.2 Following a general introduction by Mr O’Hara MP the cabinet minister for Transport and the Islands Humza Yousaf MSP addressed the meeting on the key challenges facing both islands and what could be done to remove

obstacles for future growth. The meeting then took forward two sessions the first looking at the economic future for both island Communities and the second dealing with challenges to overcome.

- 4.3 To start the first session an overview of current economic performance on the islands was provided by Fergus Murray the Head of Economic Development at Argyll and Bute Council followed by inputs from HIE, the Whisky Association, private whisky firms based on the islands of Islay and Jura together with the local tourist organisation Explore Islay and Jura. An open discussion then took place that discussed the need to share data and information on likely future expansion, the capacity and reliability of ferries and the potential for Islay and Jura to link into the year of coastal waters in 2020. The prospect of the Rural Growth Deal playing a role in facilitating future growth and the issue of attracting and retaining people with the right skills was also raised by private business interests at the meeting.
- 4.4 The second session then went on to focus on the challenges to future growth facing the islands with presentations by Jura and Islay Community Councils. Concerns over the decay of public infrastructure was raised with local roads being highlighted as a key local concern and lack of housing for incoming workers. Jim Smith the council's Head of Roads outlined recent council investment on the islands together with future plans to maintain roads and improve port facilities. Transport Scotland representatives then noted the call for an additional ferry service for Islay based on the Finlaggan rather than a larger boat requiring substantial port improvements and highlighted that studies were ongoing with regard to future ferry operations. HIAL then highlighted the recent increases to passenger numbers using the air service and the constraints imposed by the availability of small aircraft to serve island routes.
- 4.5 An open discussion then took place that acknowledged that the Rural Growth Deal was not the panacea to all the issues raised but could play a role. The importance of having the right infrastructure in place was highlighted together with the need to have good tourism marketing. However the meeting also agreed that there was a need to focus on people to ensure that there was a sufficiently skilled workforce on the islands to take advantage of increased economic opportunity. HIE called for the need to undertake a wider transportation study for Islay and Jura and the Arran Economic Group was cited as a good model to explore.

## **5.0 KEY FINDINGS**

- 5.1 Following the summit a minute was published by Brendan O'Hara with a number of key action points identified. The main action relates to the potential for establishing an Economic Forum for the Islands to include the council, HIE, Industry and Community Council reps. In taking this forward it was determined that a meeting should be convened with the Arran Economic Group to learn from their experience and this was held on the 18th of May in Lochgilhead. In addition, there were actions identified for the need to

undertake a number of feasibility studies looking at a potential commercial freight operation led by HIE and looking at establishing a community fund based on the success of the Shetland Oil Fund to be led by Brendan O'Hara. Additional feasibility studies to look at employment and skill gaps on the islands together with housing needs were also identified. Leads for the last two workstreams have yet to be determined.

## **6.0 CONCLUSION**

6.1 An Islay and Jura Island summit called by Brendan O'Hara MP was held on Islay on the 4th of April 2018. The summit was attended by three Cabinet Ministers, senior representatives from the council and a wide range of public agencies together local community and business representatives. Following a series of presentations to inform the debate a number of open discussions were held that recognised the strong economic growth potential on both islands and the barriers to realise this growth. Following the publication of the minute a number of key actions have been identified and these are now being taken forward with the principal action being identified as looking at the potential for establishing an Islay and Jura Economic Forum based on the experience of the Arran Economic Forum.

## **7.0 IMPLICATIONS**

7.1	POLICY	The summit was held with the aim to grow the economy of Islay and Jura supports the aims of the Corporate Plan, Single Outcome Agreement and the Economic Development Action Plan. The economic outcomes from this project will contribute to the Government's Economic Strategy.
7.2	FINANCIAL	None arising from this report.
7.3	LEGAL	None
7.4	PERSONNEL	Met through existing resources.
7.5	EQUAL OPPORTUNITIES	There are no equal opportunities implications.
7.6	RISK	Need to manage community expectations arising from the actions identified following the summit.
7.7	CUSTOMER SERVICE	There are no customer service implications.

**Executive Director Development and Infrastructure Services:** Pippa Milne

**Policy Lead:** Councillor Aileen Morton

May 2018

**For further information - please contact:**

Fergus Murray

Head of Economic Development and Strategic Transportation

Economic Development and Strategic Transportation,

Development and Infrastructure Services. 01546604293

Appendix 1 – minutes from meeting

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## ISLAY & JURA SUMMIT

### MINUTES

4<sup>TH</sup> APRIL 2018

#### ENSURING SUSTAINABLE ECONOMIC GROWTH ON ISLAY & JURA

##### **Attendees:**

Brendan O'Hara MP (BOH)  
Humza Yousaf MSP, Scottish Minister for Transport & Islands (HY)  
Fiona Hyslop MSP, Cabinet Secretary - Culture, Tourism and External Affairs (FH)  
Michael Russell MSP, Minister for UK Negotiations on Scotland's Place in Europe (MR)  
Robbie Drummond, Caledonian MacBrayne (RD)  
Lorna Spencer, Caledonian Maritime Assets Ltd (LS)  
Cleland Sneddon, Argyll & Bute Council (CS)  
Pippa Milne, Argyll & Bute Council (PM)  
Fergus Murray, Argyll & Bute Council (FM)  
Jim Smith, Argyll & Bute Council (JS)  
Stuart Green, Argyll & Bute Council (SG)  
Charlotte Wright, HIE - An Lòchran (CW)  
Jenny Nicoll, HIE – Lochgilphead (JN)  
Inglis Lyon, HIAL (IL)  
Jim Porteous, ICC Ferry Committee (JP)  
Beatrice Morris, Scotch Whisky Association (BMo)  
Richard Hadfield, Transport Scotland (RH)  
Donald Darroch, Jura community Council (DD)  
Islay McEachern, Islay Community Council (IMcE)  
David Adams McGilp, Visit Scotland (DA)  
Mickey Heads, Ardbeg Distillery (MH)  
Hamish Torrie, Ardbeg Distillery (HT)  
Paul Graham, Ardnahoe Distillery (PG)  
Kilchoman Distillery (AW)  
Laphraoig Distillery (JC)  
Keith Miller, Diageo (KM)  
Sean Priestley, Diageo (SP)  
Ben Mundell, B Mundell Ltd (BMu)  
Jack Fleming, Tourism and Marketing Group (JF)  
Michelle Van der Stighelen (MVdS)

##### **Welcome and introductions - Brendan O'Hara MP**

Brendan O'Hara MP opened the meeting, indicated the intended outcome of meeting was to facilitate partnership working and dialogue for sustainable economic growth of Islay and Jura. Noted the need for strategic plan for shared vision for the islands. Acknowledged Islay and Jura were unique in their setting and contribution. Indicated genuine fear that without intervention, joined up approach to growth could not happen. Cited the need for frank and honest discussion.

## **Opening remarks Humza Yousaf MSP, Scottish Minister for Transport & Islands:**

Commented on the integral and vital role transport and connectivity plays in island life. Noted the seasonal challenges and issues of an aging ferry fleet which is attracting considerable investment but will take time. Iterated that where his office can assist, will do so but will be frank of what is and is not possible.

Acknowledged the growth of spirit industry and the need to ascertain if commercial freight operation would be viable. Questioned whether feasibility study has been actioned, noted Scottish Government may be able to assist in cost.

Noted two vessels are in pipeline and the next vessel in procurement would be for Islay.

Noted the contribution of Islay to the UK Treasury from spirit duties.

Commented on the role of the Rural Growth deal in development as a means to expatriate Islay/Jura input to treasury. Recommended review of the Arran model which was part funded by HIE and local authority.

Noted other opportunities including rural tourism infrastructure (via Fiona Hyslop MSP, Cabinet Secretary for Culture, Tourism and External Affairs).

Minister concluded that he would listen to the discussion, return as required and keep conversation going with stakeholders. Commented that Islay and Jura were a good news story.

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## **SESSION 1 – THE ECONOMIC FUTURE OF ISLAY & JURA**

### **1. Overview current Islay & Jura economy – Fergus Murray, Argyll and Bute Council**

Key facts available separately. High levels of self-employment, extremely low unemployment (0.6%). Strong and global 'brand'. Key sectors – whisky and tourism but also manufacturing, construction, aquaculture, renewables, outdoor pursuits and retail. Highly resilient and innovative community.

Key challenges:

- Classed as economically fragile
- Ageing and falling population (Islay)
- Physical and Digital Connectivity
- Affordable Housing (100 new in recent years)
- Brexit
- Routes to market (delivery charges big issue).
- Skills gap – underutilisation of skills
- Need for clear industry voice, identify key priorities, no single chamber of commerce in AB.
- Infrastructure

### **2. Whisky production – challenges & projected growth – SWA (Beatrice Morris).**

Future of whisky industry and plans are key. Commercial confidentiality is king. Accepted wisdom of growth and substantial growth in industry. Also recognised role of tourism (150,000 visitors and £6m generated last year). Transport is key issue including road conditions and ferry space/reliability. Current road conditions having significant cost implication. SWA committed to working with Calmac/Transport Scotland. Data cannot be shared widely due to competition law. SWA committed to collaborative working. Considerable growth in pipeline, infrastructure needs to be in place. Keen to engage and work together, could there be a better use of current capacity?

#### **Simon Coughlin, Bruichladdich**

Started with 2 employees in 2001, now 100 (75 on island). Distillery operates fully from island.

Many brands don't run distilleries locally. Projected truck movements – 700 in 2018 split between building infrastructure (125) remainder (575) for packaging, casks, barley, yeast, taking finished goods off island for export. Growth in 5 years – 84% (1350 truck movements). Growth in 10 years – up to 2,200 truck movements (300% increase).

Issues: Finding personnel a challenge. Various issues including transport, freight and personnel will be challenging but must be resolved for business to survive.

BOH added situation not dissimilar to other distilleries and tourism likely to multiply.

3. **Islay & Jura tourism – Islay & Jura Tourism & Marketing Group (Jack Fleming)**  
350 tourism businesses. Islay and Jura has unique visitor offering. Whisky tourism, wildlife and conservation. Islands have a longer tourist season with considerable annual growth. Industry investment confidence low. Key issues, ferries, roads, internet connectivity. With current issues, return visits are at risk.
4. **Potential Investment & Growth - Highlands & Island Enterprise (Jennifer Nicol).** HIE role includes sustainable economic and community development. Noted contribution from island to Scottish economy. Staffing challenges needs to be looked at. Aquaculture and renewables industries on horizon. Noted community organisations are often part of infrastructure. Commercial investment possible but transport and infrastructure key. Reiterated fragile rural economy. Stressed that lack of housing and infrastructure will deter repopulation. Recruitment and retention of staff fundamental.

## Open Discussion (1):

CS: Quality of information from Bruichladdich commended. Acknowledged sensitivity of market data but means of aggregating anonymized data possible. Q: Is there a Third party who the distilleries will trust with that information in confidence?

Need quality data to do some scenario planning. Is a freight operation feasible? Need quality data to test market?

Tourism growth (33% in last two years). Will need to be factored in. Is this data available and can it be aggregated?

BMo: Aggregated data from SWA. Can't put in public domain due to commercial sensitivities.

CW: Suggestion of feasibility study. Agree scope – will require confidentiality. Use trusted consultant to bring together in feasibility study. Bring to market or bring operators together. Recognise sensitivities – but needs to be unlocked to support challenges.

AW: Bruichladdich special case. Other distilleries don't do everything on island. Freight big issue. £5m investment to double production. Will be creating more jobs but not on scale of Bruichladdich.

KM: Perspective slightly different. Barley boats by sea to avoid road transport. Tanker spirit off island vs. cask. Happy to share aggregated data. Caution - Cars and tourism bigger issue than freight.

RD Calmac: Commercial traffic growth flat. Cars the biggest growth. What does this growth look like? There is excess capacity in winter. Can this be spread? Industry working together could balance demands.

FH Ambition, wanting growth and be confident about ambition. Comparative advantage of Islay. Whisky and tourist growth. Increased sustained growth. 2020 – Year of Growth. Scottish Tourist alliance – food tourism alliance. Scotland brand about to be launched. Will drive tourism. Sustainability and planning for growth. Length of season – key. Identify who you want to bring here?

- MR: Rural deal, accessing resource – island needs major roads investment, rural deal – 2 years in discussion – Need for something imaginative in rural deal. Model of ferry infrastructure same as every other island. Islay very different. Upscale Calmac offering – Islay needs to start again. How would you deliver this service? If nothing else, reversing view of what's being done and undertake feasibility study into how we do this? Redoing roads not enormously expensive.
- Identify employment and skills gap. Tourism needs more personnel. Recruitment very difficult. Alarmed by unemployment rate. Housing capacity: 100 houses very welcome but affordable housing crucial. Need to attract people to settle here. Year of young people need to find way of keeping here.
- JP Calmac press release this week re disruption this summer re aging fleet. Life expectancy 25 years. Risk of mechanical failures significant. Great for new ferry. Lots of developments taking place in immediate short term. Jack F – reliable service essential.
- HY Noted Wild about Argyll hugely successful. Long term potential solutions need to be in place. Provision of new vessels takes time > 5 years. Short term? Remove some of obstacles re potential growth. Discussions CALMAC / CMAL – can we spend money (£10m) on reengineering? Expand lifespans? Additional sailings? Always open to look at although vessels do need maintenance. Look at scope of feasibility. Stakeholders – **conversation on scope of feasibility study (Identify stakeholders)**. If Islands Bill passes Scot Parl later this summer will introduce national islands plan – commitment to island communities– will include many of these issues, including depopulation.
- CW – Biggest constraint – people. Talent, skills, people – not one sector that people is not an issue. Raised as major issue at convention of HI. Strategic group for highlands and islands looking at what we can do strategically. What do you want island to look like. Need hard info and data.
- BMu: 3 staff have no accommodation. No private housing available. Lots of affluence but no private housing to buy. Social housing is welcome. Machrie need 60 staff. Only
- IL Freight study – include tourism, Visit Scotland numbers, where are visitors coming from? Is there demand from Edinburgh?? Consolidated database would be good.
- BMu 6 members of staff in company-owned housing at council house rent. 5 wives also have jobs in Islay. Port Ellen council accommodation quoted £750 per month. (CS Housing associations).

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## SESSION 2 – THE CHALLENGES

### 5. Jura Community Council (Donald Darroch)

Consider UK excise contribution. Jura has fast expanding population and economy. £45/50m investment. Dozen new jobs. New families – poss 20 new families. Needs public investment in infrastructure. Lack of understanding of islands. Public should not suffer. Ageing fleet in service provider. Challenges – nothing has happened since last 2 workshops in 2016. Roads have deteriorated. 10 new houses not appeared. Challenge: Road system needs restructuring not repair. Hauliers do have issues at times. Challenge: lack of housing for incoming workforce. Lack of available workforce on island. New distillery on Jura is building own pier, own vessel, own houses for own staff, nothing public sector can give to them. Planners been helpful but roads department – issue. Need easier, faster access to mainland. Cost of travel. RET no great benefit to residents. Issue with retaining Jura's natural culture – increased 'incomers'. Tourism comes with challenges, interferes with other businesses. Golf – more likely to travel by air. CAP – based on research. Easy to blame ABC but need to move on from blame culture. Surprised just discussing distilleries. Tidal issue will be massive (for Islay). No jobs once online. Agriculture key industry in Islay, supply local foods.

BOH - will be meeting with other stakeholders but no space to expand this meeting. Energy – tidal barge at Connell because of UK energy policy – insufficient UK feed-in tariff to make it competitive – moved to Malaysia. Needs commitment from UK gov to make it affordable. BOH looking for ways around.

## 6. Islay Community Council (Islay McEachern)

Most of issues already discussed. Need for infrastructure to be fit for purpose. Ongoing dev – infrastructure needs to keep pace.

### Jim Porteous, ICC Ferry Committee

China market - no malt whisky in South China. Whisky massive opportunity. In May WW100 commemorations. International event. Roads deteriorating – mainly due to HGVs. Designed to accommodate up to 10 tonne vehicles. Most whisky traffic on small lorries. Roads structure not changed. Patched up. Built on peat. Built on railway sleepers (rotted). Not designed to carry 44ton artics. ABC tries best with limited budget but merely scratching surface. Asked ABC to put cards on table. £17m to upgrade roads. Whisky contributions to treasury £200m per annum (source BOH). Make special case to UK Gov. Consider island tar production. Dunlosset ready to invest in tar plant if commitment from ABC. Cost would be half what they're paying for repairs. Tar more durable than current method. Suggesting – spend needed £20m and then how do we maintain roads. Golden goose, providing much wider benefits than tax receipts for treasury. Islay and Jura increasingly popular.

BOH - Look at Shetland Oil fund Zetland CC Act 1974 – raising funds for Islay (islands) – roads – ahead of meeting sent letter and survey to every household. Overwhelmingly the main issue is roads.

## 7. Road network - A&B Council (Jim Smith) (see slides appended to minutes)

Responsibilities also include Marine infrastructure & waste management. Port Askaig Council responsibility. Potential for further expansion for larger vessels. Landfill site on Islay – 2021 new way for waste. Issues Backlog maintenance figure of £200m in roads investment. £17m for Islay and Jura. ABC more investment in capital. Road conditions will slightly improve. Capital programme £16m (£8m a year). This will fix network but significant funding gap. Traffic volumes – low vs rAB but higher HGVs – 1000 vehicles per day (AADTF). 17.2% HGVs – 26 HGVs per day. All average. Higher percentage of HGVs. Counters around road network at mo. Slight growth in HGV traffic. Roads investment for Islay/Jura £900,000 – number of schemes underway. Rev budget £400k for Jura, Islay (and Colonsay). Winter/Floods etc not included. Scan survey done – but not done every year. Scan survey does 32 markers. Road condition index. Red, amber, green. Red – failed and vice versa. Slide with road condition index for Island.

## 8. Pressure on transport infrastructure - Transport Scotland (Richard Hadfield)

Operational issues. Interesting stats on growth. TS do gather own stats. Shows traffic growing, freight and tourist traffic growing. Demand growing. Commitment to another vessel to address increased demand. Since 2007 – scot gov invested £1bn (prob closer to 1.5bn) in ferries. Investment = new port infrastructure, vessels, 36% car traffic, 20 % – commercial, 20% passengers. Increases suggests increased tourism, sense of economic growth activity, wellbeing, trying to ensure growth can continue and sustainable. RET gen. welcomed. Has brought challenges re capacity all over network. Fleet under pressure. 2 major vessels since 2011. Not removed vessels from fleet (8 to 10) – whole fleet deployed. Not much available capacity. Jura – also needs ferries. Ferry resp of ABC. 5.6 yrs ago – involved with DT in bringing in funding from Scot Gov for Craighouse Tayvallich service. Looking forward – different model needed. Need study work for long-term. Facing challenge – Islay by 2028 – back to where we are today. Need to establish a plan post-2028. Sit within wider infrastructure plan re Islay/Jura. 3 vessels? 1 freight? Bigger ports then bigger ships? Other ideas – bring mainland port closer to island – increase capacity via frequency. Overland route to Jura – comes up. Different models/ideas. Did intend to do bigger study work. Funding for study

available (tbc). Discussions with Scottish futures trust. Broad accelerator model. If objective re employment etc. then funding available. Money still needed up front. Bring in SFT?

## 9. Air Travel – Highlands & island Airports Ltd (Inglis Lyon)

Air passenger numbers increased from 22k – 32k in recent years. How good could it be? Sep 17 – competition between Flybe and Logan air. Fares reduced by 2/3rds. Generated extra 33% extra business. Not good economics but shows what can be achieved. Fares, frequency, choice and profiles. Rural depopulation if islands are inaccessible. Also – take out to worldwide market. Marketing currently fragmented. Work with airlines? Example, codeshare can work – Loganair plus Flybe. . Not just marketing to Glasgow etc. but to rest of world. “codeshare”. Current Loganair fleet profile 27 years. At some point how do we replace these aircraft? With what. 15/20 years – manufacturers moved into larger aircraft, running costs far lower. 30-40 seat aircraft no longer being made. How do we maintain, provide links – current craft 30 years old. Global appeal of Islay – 4 corners of globe to come to Islay via air. Glasgow, Edinburgh, London etc... lets be sure as part of Brexit, all existing arrangements for thru travel stay in place.

## 10. Islay & Jura post-Brexit – Michael Russell MSP, Brexit Minister

Important to be upbeat. Problems of success. Special characteristics. Pressure on ferries is via success. RET was previously good idea. Has produced its problems. Transformation of public service to match success that exists. Of course lots wrong. Inability to meet expectations. Massive task which can't be done by one organisation.

Challenge. Air transportation. After 29<sup>th</sup> March 2019 – caveat – cannot guarantee to deliver service. Membership of EU international agreement, regulation of aircraft, guarantees etc. down to EU. If not negotiated in next 12 months, agreements will fall. Renegotiation = global agreements. Best outcomes – (1) single market, customs union membership. Still not as good as we have now but keep in place. (2) free trade agreement – Canadian agreement would be much worse than now – but still some prospect of continuing important issues, fishing, agriculture will be affected (3) Reverting to WTO rules. Massive bureaucracy, everyone challenges everyone else. Need to be very good at negotiating. People, money, regulation. Already shortage of people. 20% of 260000 people, will retire in next 10 years. If no EU migration, shortage can't be made up. People big issue. Money big issue. Agriculture, without subsidy – no agriculture on this island. Indirect payments investment infrastructure, social, regional funding. Will there be an alternative? Shared prosperity fund been announced but no detail. Regulation – getting regulation in place for March 2019 or 2020 – massive job to be done – but not started. Complicated business. 3 outcomes – in matrix – look at problems. Not insoluble. Whisky global business. Markets will be unpredictable. Huge opportunities – Brexit will challenge over long period of time. Every biz, org needs to articulate of single market opportunities are preferable.

### OPEN DISCUSSION (2): Towards a shared strategic vision

BOH: Establish Economic Group Forum to include Council, HIE, industry, Community Councils.

HY: Why not replicate Arran group (suggested visit). HY will put us in touch. Don't limit to only route. Keep pursuing rural growth deal. BOH to follow up.

FH: Look at both. Voice of businesses, tourism, agriculture etc. Look at city deals, Ayrshire Growth deals. Tourism infrastructure new to the concept. Do something similar to Arran – Link up with rural growth fund. Private housing – must be potential option. Building growth. Growth accelerator opportunities. National investment fund. Partnerships nat gov, local gov and private sector.

CS: ABC has not focused on rural growth deal because specific Islay and Jura. Detailed discussion with AB to bring this to focus. Aspiration – same time line as Ayrshire. Could bring back specific detail, already well into the process. Have structures to engage with businesses. Ambition – wide-sweeping approach to rural growth. Areas of strength, areas of growth. Don't displace that growth from other parts of Scotland.

BOH: Economic group for Islay and Jura – not mutually exclusive. Working well for Arran. Spoken many times re rural growth deal, also spoken to David Mundell. Do we agree worth pursuing? CW will assist if poss. Shaping to business requirements, chaired by business. Getting agenda driven by business.

PM: Growth deal – FH point – infrastructure investment – goes beyond what growth deal. Data essential. What will private sector facilitate? Get feedback from UK – innovation/uniqueness. Softer – skills development and talent management. Like engagement with businesses to help make cases. Keen to engage with businesses here.

Islay Econ Group – support HY. Economic Group become very good model. Happy to work with group going forward.

HY: Islay seen as separate to AB, just as part of economic group conversation – have discussion around how Islay is marketed separately – value in promoting that. Don't lose uniqueness.

JN: First step – Establish how you want to brand the island.

JP: Industry/infrastructure – strength is people, infrastructure starts with people, not community CPR. Feed into growth across communities.

BOH: Problems of success. Responsibilities to communities now and of the future benefit from success, Overriding priority – sustaining achievable sustainable economic growth. All committed to meeting those challenges and being part of solution. Shared vision.

CW: Keep momentum – scope transport needs group.

BMu: We have economic growth but no ferry system. Ferry is the one thing that's holding island back. Ferries unbelievable. Not been in such a bad position at night. Requirement to move lorries around – ferry too busy. Haulers constantly juggling. Haulage on island has 2.5 weeks grace if ferries go bang. Something has to be done.

HY: Ferries are enabler of growth. Some is longer term. 5 years etc. Focused/keen on scoping study. Feasibility study – is a freight option commercially viable? Could be Calmac? Does it add up? Port infrastructure etc not short term plan. Short term solutions – come to HY – if we have resource we'll do it.

Is commercial freight a viable option? Is this a useful route? ARRANGE. Scoping Exercise & Feasibility Study.

Calmac: Problem of success. Anything Calmac can do short term – happy to have an input.

BMo: Already feeds input into Transport Scotland. Need more? SWA happy to assist.

JP: Stats involved with Calmac. Data not what it should be. Lots that could be done to improve management of space available. Data inaccuracies could mean space not being utilised.

## **ACTION POINTS:**

1. Establish Economic Group Forum to include Council, HIE, industry, Community Councils. Engage with Arran Group and arrange joint working session. (BOH)
2. Scoping Exercise/Feasibility Study – Commercial Freight Operation. (HIE)
3. Distillery growth: Is there a Third party who the distilleries will trust with that information in confidence? (BMo/HIE)
4. Identify employment and skills gaps. (TBC)
5. Housing capacity and local needs. (TBC)
6. Look at options re Shetland Oil Fund – BOH to establish local petition and present to WM. (BOH)

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