



Scottish Local Authorities Economic Development Covid-19 Supplement to SLAED Indicators Report 2019-20

About this Report

This report has been developed as part of the support provided to SLAED by the Improvement Service.

Please note that all information in this report was accurate at the time of publication. However, given the rapidly changing nature of the Covid-19 situation, there is a possibility that information may become outdated.

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1. Introduction

The next SLAED Indicators Report is due to be published in December 2020, and this will be the eighth annual report providing consistent data and evidence on what councils throughout Scotland are delivering as local economic development organisations. However, as the report sets out data from the 2019/20 financial year, the unique economic circumstances faced in 2020 as a result of the Covid-19 pandemic and economic crisis will not be covered. The report will be critical to the continuation of collating trend data and setting the baseline for the Covid-19 impact, but will have limited scope to demonstrate the significant challenges faced in 2020. The challenges faced by local economic development teams will become clearer in the 2020/21 report, which will be published at the end of 2021.

This Covid-19 supplement has therefore been compiled as an interim report to acknowledge the significant impact the crisis has had on local areas, as well as the critical role that local authority economic development services have played, both in terms of the initial crisis response as well as ongoing support for recovery. It emphasises how economic development teams have been at the forefront of rapidly adapting and responding to the needs of local people and businesses, as well as identifying and supporting vulnerable populations. The report therefore seeks to show that the work of local economic development teams needs to be recognised and resourced accordingly.

2. Impact on Local Authority Economic Development

The economic shock from the national response to the Covid-19 health crisis significantly changed the landscape for local economic development over an extremely short period of time. Resources were immediately redeployed to assist in the administration of support to people and businesses in most areas. This has had significant impacts across a range of economic development activity that local authorities deliver, including support to businesses, City and Growth Deals, employability support and town centre regeneration. Focus has now begun to shift towards recovery, but with ongoing uncertainty in terms of current and future restrictions, the way forward remains unclear.

With the Coronavirus Job Retention Scheme (CJRS) due to end on 31st October 2020, the UK Government has announced a new wage subsidy scheme, the Job Support Scheme (JSS) which will run for six months. However, this is aimed at keeping employees in viable jobs which will be impacted by lower levels of trade over the winter months, but not protecting jobs which are likely to become redundant once the CJRS ends. The effectiveness of this scheme has not yet been identified. This means that there remains a real risk to the viability of many businesses and those that they employ. This will have significant knock-on effects on local economies, reducing spending power and increasing job losses. Further measures have also been put in place by the Scottish Government in terms of a £40m support fund for business affected by the increased lockdown measures implemented on 9th October. However, despite this, unemployment is already impacting on people across all demographics, and future support will need to be targeted at those most at risk, or where the biggest positive impact can be achieved. This should be tied to job retention and creation, and repurposing skills to meet the requirements of the sustainable recovery plans being produced by local authorities. There is a general consensus that recovery should be focused on a greener economy with wellbeing and wealth building as key priorities.

Early indications are that changes in the labour market brought about by Covid-19 will have the biggest impact on those on the lowest incomes and in the least secure jobs. It is also expected that there will be a disproportionate impact on young people, women, those with disabilities and minority groups, which will in turn increase existing social and economic inequalities. Those leaving education are likely to be displaced and without a next positive destination, and many young people previously employed will become unemployed as businesses cease to operate.

Businesses are also likely to need support to navigate the new health and safety requirements, as well as changes in markets and customer needs. This is likely to involve reviewing and diversifying existing business models to reflect changing regulations and customer requirements, many of which may be long-term or permanent. This is likely to further accelerate the existing need for better connectivity in many areas, as well as making better use of technology and digital solutions.

Prior to the Covid-19 crisis, many local authorities in Scotland had declared a climate

emergency and were beginning to look at increasing sustainability and transitioning to a greener economy. Covid-19 has accelerated this process and has demonstrated the benefits of investing in and developing local production and shorter supply chains. This will significantly reduce the carbon footprint of production as well as ensuring local businesses have a greater capacity to meet the needs of local markets and increase levels of resilience against future crises. The effective resourcing of local business support and supplier development will therefore be an essential element of the recovery process and this is something that local authority economic development teams are delivering on the ground.

The economic consequences of the health crisis will impact on the trajectory of City and Growth Deals and a number of projects are likely to need to be delivered earlier than previously anticipated. There are elements within existing Deals that are ready to go and would provide significant economic benefits if delivery programmes could be accelerated. Where Growth Deals have not yet been signed, it would be beneficial to finalise these as soon as possible to assist areas in taking forward recovery plans. For Deals already in place, some projects may benefit from repurposing to respond to the significantly different economic landscape and challenges being faced as a result of Covid-19.

3. Need for Local Solutions

National government had to respond rapidly to the evolving Covid-19 health crisis, therefore support interventions for the economy also had to be implemented within very short timescales. Although necessary, this resulted in blanket support measures which did not take account of local circumstances, challenges or opportunities. Going forward, delivering economic development services at a local level, particularly in rural and remote communities, will be very challenging, and focus will need to shift to community resilience and wealth building. This might need local authorities to take different approaches to procurement, employment and infrastructure provision, as demonstrated in the Improvement Service's [Economic Outcomes Report](#). This highlighted that local authorities have three main 'economic levers' – as employers, procurers and asset owners – that can be maximised in order to benefit local economies and complement conventionally defined economic development activities. This type of approach is beginning to gain more traction as a number of councils are developing 'Community Wealth Building' approaches to economic development, which has been made even more important as a result of the Covid-19 crisis.

Some areas are particularly reliant on individual sectors which have been particularly vulnerable to the negative impacts of the crisis, such as hospitality, food & drink and tourism. These sectors are often made up of a significant number of micro businesses or self-employed people which contribute to the number of jobs at risk in these areas. Building resilience and person-centred approaches is key, and local authorities have an in-depth understanding of local business bases and employment patterns, and are therefore best placed to develop solutions to meet the specific needs in their local areas.

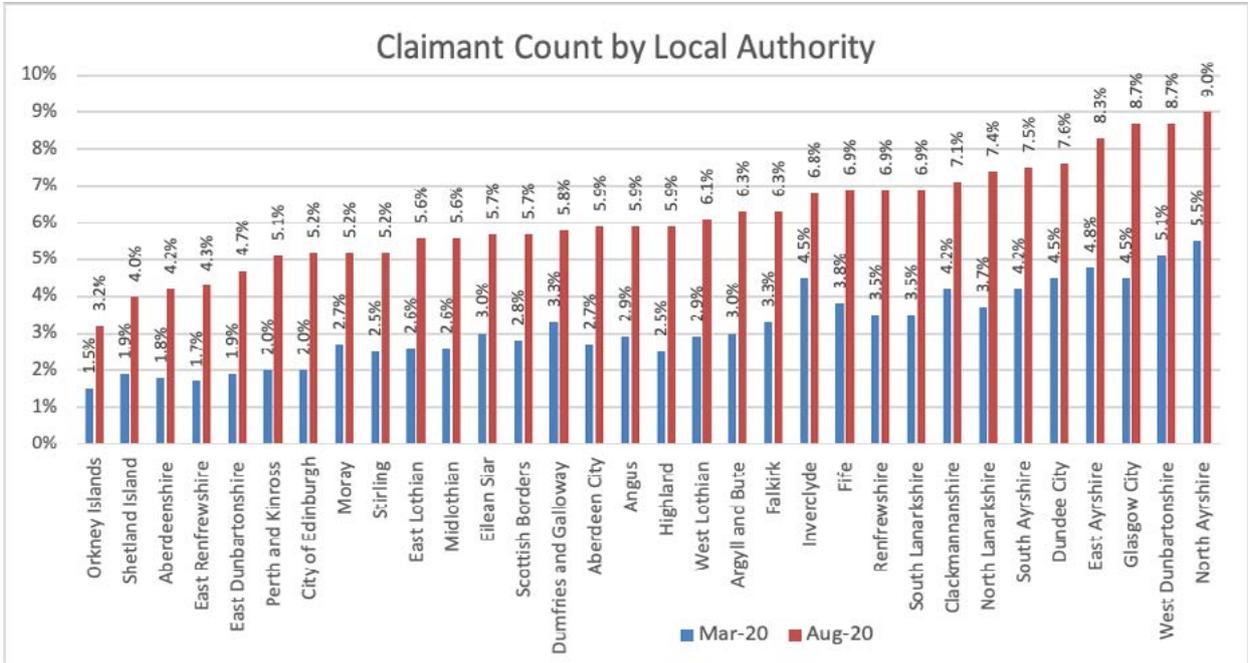
4. Data and Evidence

4.1 Claimant Count

The claimant count almost doubled between February/March and August in Scotland. Some local authorities, mainly those with low levels of claimants pre-crisis, have seen especially large increases in the number of claimants: City of Edinburgh (169%), East Renfrewshire (158%), and East Dunbartonshire (146%). The lowest increase was in Inverclyde at 46%. However, this could be partly due to Inverclyde having an earlier roll out of Universal Credit and being less impacted by people moving onto this from other benefits e.g. tax credits. Resolution Foundation have warned that Claimant Count may overestimate the number of people who are unemployed,¹ however it still provides a useful picture of the number claiming unemployment benefits.

Chart 1 below shows the claimant count for each local authority as a percentage of the total population aged 16-64. This is shown for both March and August 2020 to demonstrate the increase in claimant count across all local authorities as a result of Covid-19 restrictions.

Chart 1



4.2 Covid Business Support Fund Grant Scheme

The Scottish Government’s Coronavirus Business Support Fund was set up to support businesses impacted by Covid-19 and was administered by local authorities. It consisted of the Small Business Grant Scheme and the Retail, Hospitality and Leisure Business Grant Scheme, and was available for applications up until 10th July 2020. Local

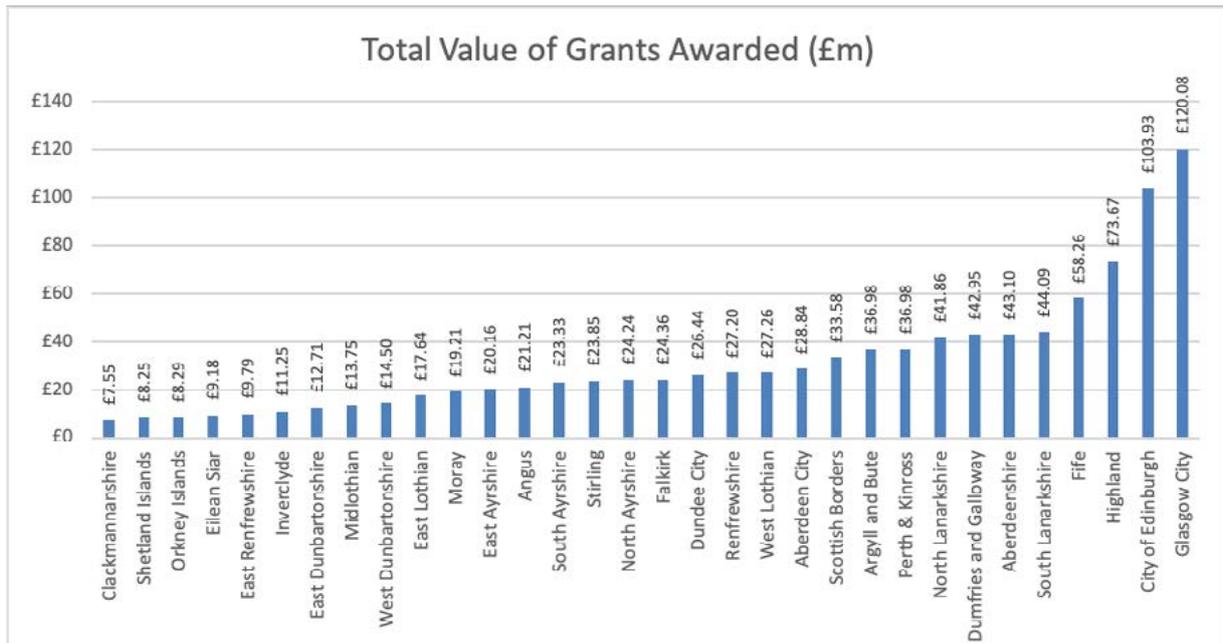
¹ <https://www.resolutionfoundation.org/app/uploads/2020/07/The-truth-will-out.pdf>

authorities continue to process applications received up until that date.

By 8th September, local authorities reported that over 106,000 applications had been received for the two schemes across Scotland. Of these, over 90,000 grants of a value of over £1,014m had been awarded.

Chart 2 below shows the total value of grants awarded by each local authority as of 8th September 2020.

Chart 2

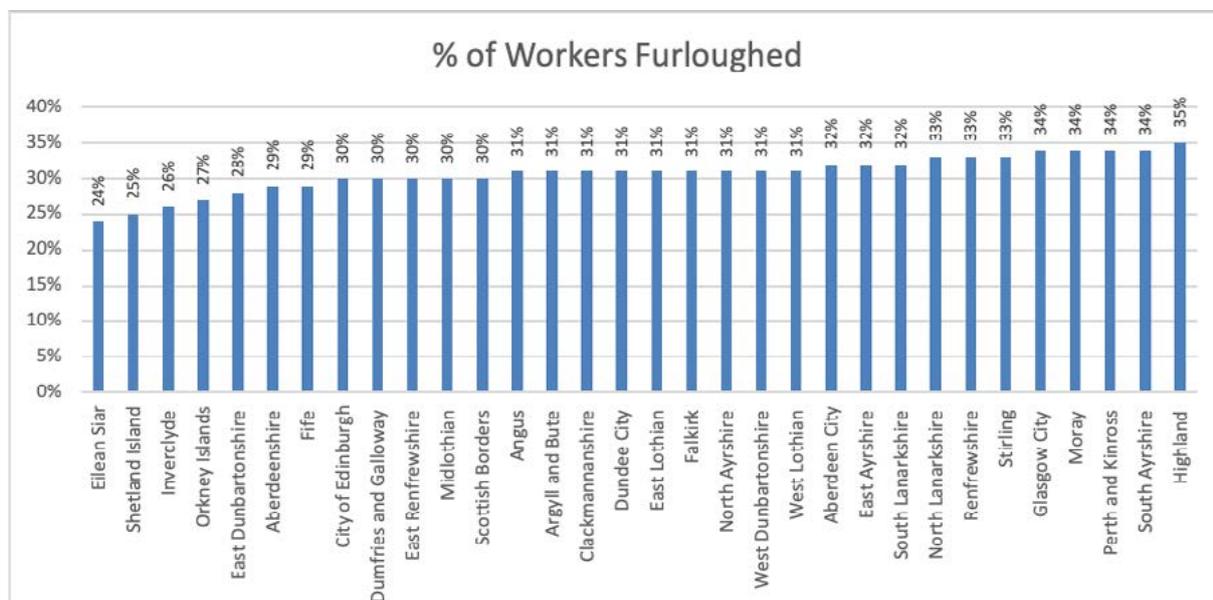


4.3 Coronavirus Job Retention Scheme Statistics

As of the end of July, 779,500 jobs in Scotland (32% of all jobs) had been placed on furlough. This was the same proportion as for the UK as a whole. At a local authority level the proportion of staff furloughed ranges from 24% in Eilean Siar, 25% in Shetland Island, and 26% in Inverclyde, to 35% in Highland and 34% in Glasgow City, Moray, Perth and Kinross, and South Ayrshire. Scotland had high rates of take up in the construction sector compared to the UK (73% vs 60%), but broadly similar rates for all other industries. Accommodation and food was the sector with the highest proportion of jobs placed on furlough at 77%.

Chart 3 below shows the percentage of workers furloughed in each council area in August 2020.

Chart 3

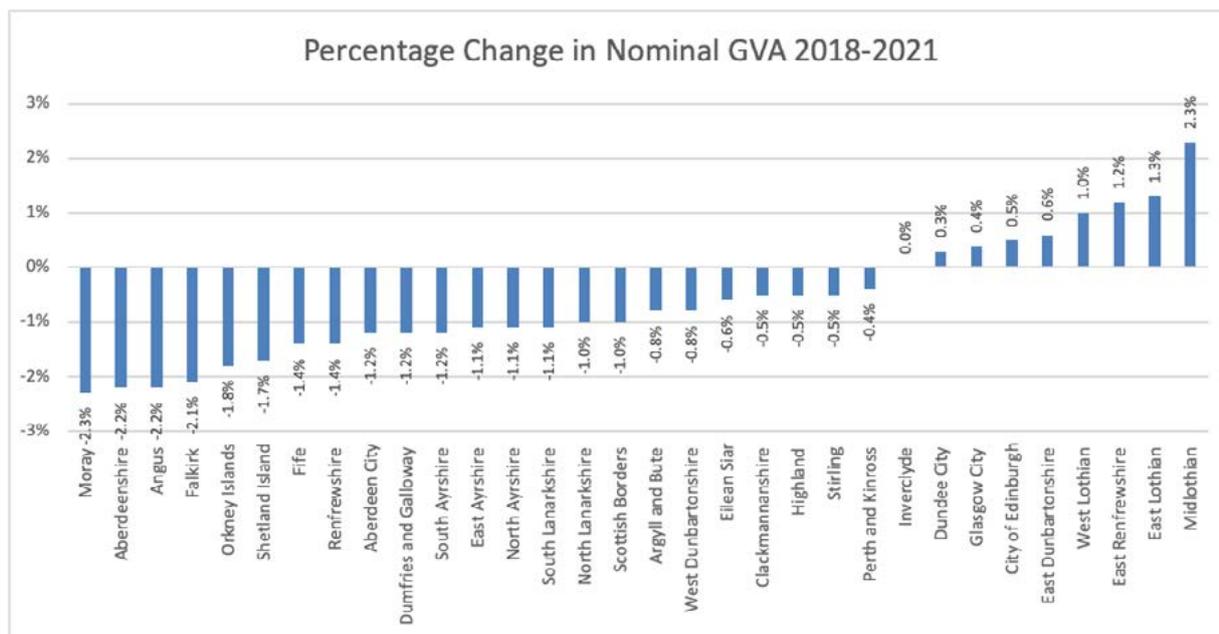


4.4 KPMG GVA estimates

UK wide GDP is expected to fall 10.3% in 2020 and grow 8.4% in 2021. In Scotland expected GVA change is -9.1% in 2020 and 8.2% growth in 2021. Only Northern Ireland of the other 11 UK regions is expected to see a smaller decline this year, while 7 regions are expected to see faster growth in 2021, albeit from lower bases due to larger decline in 2020. Within Scotland the expected GVA change for 2020 ranges from -11.4% in Orkney Islands, -11.1% in Shetland Islands, and -11% in Falkirk to -7.4% in East Renfrewshire, -7.6% in Midlothian, and -7.7% in Edinburgh. In general, those areas with the largest decreases in GVA in 2020 are expected to see faster growth in 2021. Orkney Islands is expected to see the fastest growth at 9.5%, while South Ayrshire (9.4%), East Ayrshire (9.2%), and Shetland Islands (9.2%) are also projected to have strong growth after high levels of contraction in 2020. Moray, Aberdeenshire, Angus, and Falkirk are expected to see slow growth in 2021, despite large decreases in GVA in 2020, with projected GVA in 2021 in those councils more than 2% lower than in 2018. Only nine councils are projected to end 2021 with a nominal GVA higher than in 2018, with Midlothian (2.3%), East Lothian (1.3%), and East Renfrewshire (1.2%) expected to see the largest rates of growth.

Chart 4 below shows the estimated change in GVA for each local authority between 2018 and 2021.

Chart 4



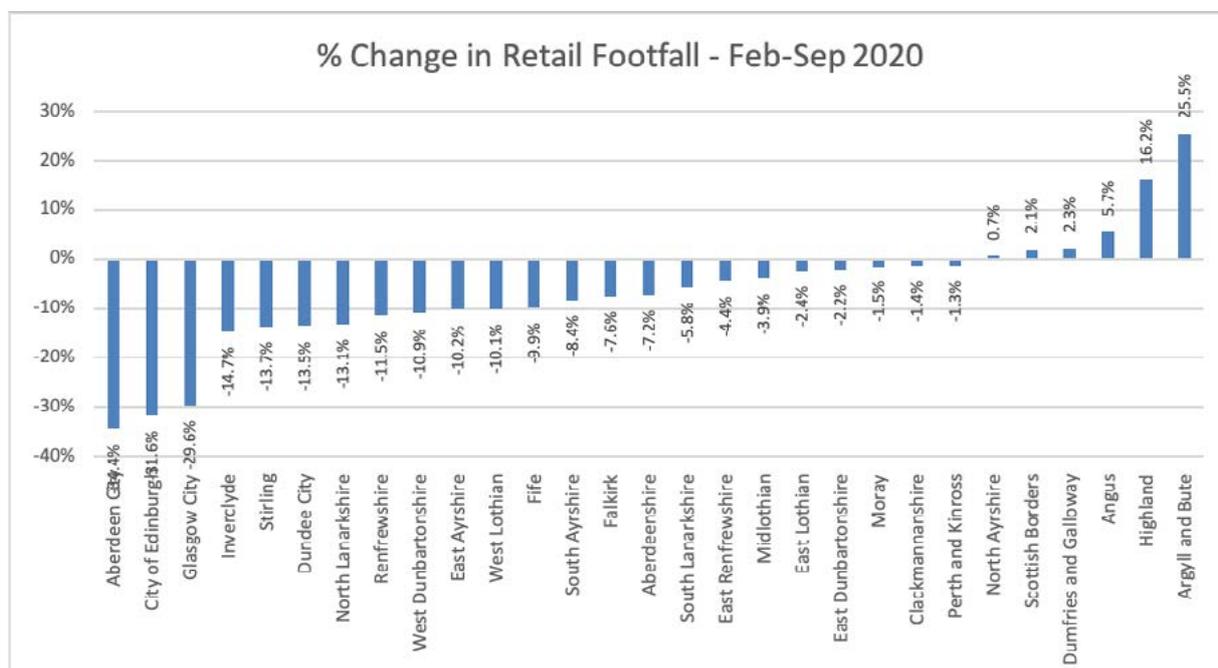
4.5 Google Footfall Data

Retail and recreation footfall fell across Scotland by 73% between February and April 2020. Since then it has steadily increased and in September was around 7% lower than in February. Some Councils have footfall at higher levels than in February, Argyll and Bute (25.5%) and Highland (16.2%) are especially high. In contrast, some areas, including Edinburgh (-31.6%), Glasgow (-29.6%), and Aberdeen (-34.3%), still have much lower footfall levels than usual.

Workplace footfall is still 32% lower in September than it was in February. This is higher than it was in April (-64%), but remains the same as in August. Some areas still had much lower rates of workplace footfall in September, including Edinburgh (-49.7%), Glasgow (-40.1%), and Aberdeen (-40.5%). This may be reflective of a greater ability to work from home in occupations that are typically based in cities.

Chart 5 below shows the changes in retail footfall for all local authorities between February and September 2020.

Chart 5



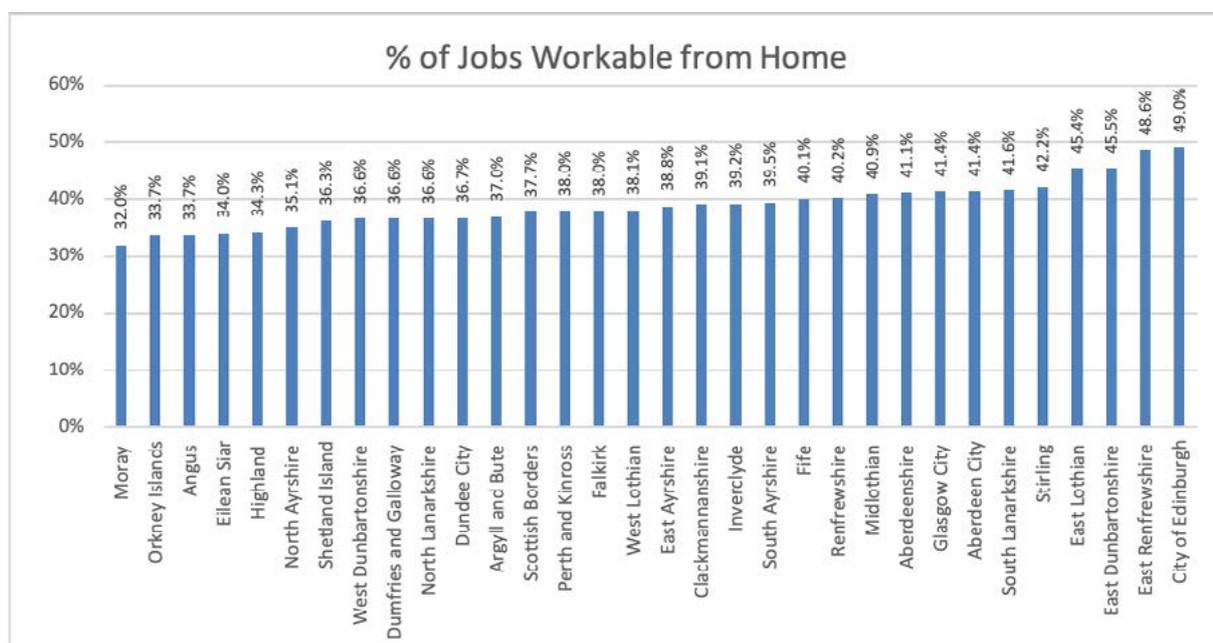
*Note no data was available for the island authorities

4.6 Work from Home Estimates

In Scotland just over 39% of jobs can be done from home, which is lower than the 44.6% in the UK as a whole. This is due to a higher proportion of non-teleworkable jobs in Scotland. In both Scotland and the UK, shop sales assistants (which cannot be done from home) is the most common occupation. However, this accounts for a higher proportion of jobs in Scotland at 4.2% than in the UK as a whole at 3.4%. This also varies between local authorities, with Shetland Islands (albeit based on incomplete data), City of Edinburgh, East Renfrewshire, East Dunbartonshire, and East Lothian all having rates of teleworkable occupations higher than the Scottish and UK averages. Meanwhile, Orkney Islands, Moray, Eilean Siar, Angus, and Highland Councils have the lowest proportions of jobs that can be done from home at under 35%. Work from home estimates are based on the methodology used by Dingel and Neiman in their report *How Many Jobs Can be Done at Home?*. The methodology is based on a survey of detailed occupations within the United States determining which of these are teleworkable. These proportions are then applied as weights to broader occupational categories as recorded within the Annual Population Survey. Local authority occupational data was taken from the Annual Population Survey and used an average of the last four data returns over 2019 and 2020 in order to reduce large fluctuations in reported occupations. Missing data was estimated using 2011 Census data.

Chart 6 below shows the percentage of jobs within each local authority area that can be worked from home.

Chart 6



4.7 Impact on Sectors at Risk

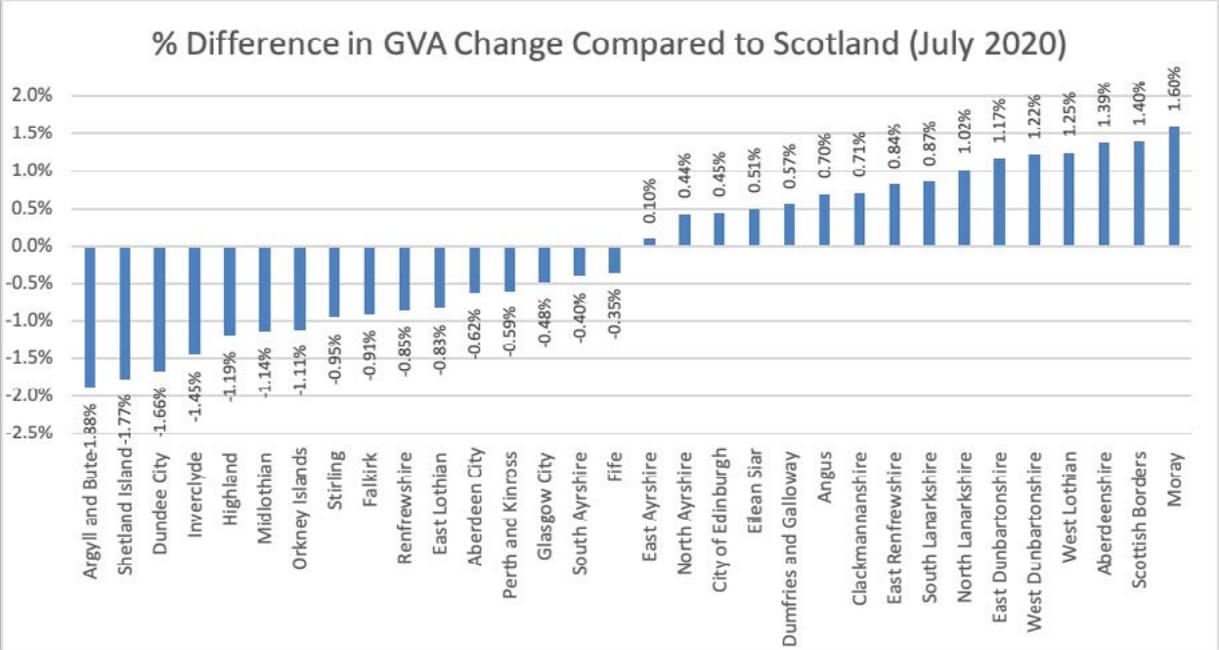
The Scottish Government has published the change in output per industrial sector between February and July. Several industries have substantially lower levels of output compared to their pre-crisis levels. Construction; Transport and Storage; Accommodation and Food Services; Administrative and Support Service activities; Education; Human Health and Social Work activities; Arts, Entertainment, and Recreation; Other Services; and Household Activities were all still reporting over 10% lower output than in February. If these changes are applied to local authority level GVA and employment by sector it is possible to estimate the local impact of the economic downturn. This analysis suggests that certain local authorities have been especially impacted by the downturn. The five local authorities most impacted in GVA terms have been Argyll and Bute, Shetland Islands, Dundee City, Inverclyde, and Highland. These areas have a particularly large proportion of their industry within the most impacted sectors, for example Argyll and Bute has a particularly large proportion within the Accommodation and Food Sector, Shetland in Transportation and Storage, and Dundee City across Education and Human Health and Social Work. The five local authorities that have been least affected are Moray, Scottish Borders, Aberdeenshire, West Lothian, and West Dunbartonshire, however they have all seen a significant reduction in output. These areas have larger proportions of their output in less affected industries, for example Manufacture of Food, Beverages, Textiles and Clothing in Moray and Agriculture, Oil and Gas, Water and Waste in Aberdeenshire.

Some industries have relatively low rates of employment, despite high GVA output and vice-versa. Accommodation and Food activities, for example, contributed 3% of Scottish GDP, but 8% of employment. In terms of employment by industry, and assuming that GVA change may translate to similar reductions in employment levels the local authorities with the greatest number of jobs at risk are: Dundee City; Argyll and Bute; East Lothian;

Highland; and Stirling. Stirling and East Lothian, for example, both have a high proportion of employees working within the Accommodation and Food Sector and in Education. The areas likely to have been least impacted are West Lothian; North Lanarkshire; South Lanarkshire; Midlothian; and Aberdeenshire. This risk to employment is not currently reflected within the claimant count numbers, but it is likely that the claimant count is currently being affected by the Coronavirus Job Retention Scheme and, once this ends, claimant levels are likely to increase.

Chart 7 below shows the percentage point difference between local authority GVA change and the national change for Scotland as a whole.

Chart 7



4.8 Business Impact of Coronavirus Survey (BICS)

The Scottish Government has released weighted results from the Business Impact of Coronavirus Survey (BICS) for Scotland for the period from June to September. The sectors that appeared to be worst affected were Arts, Entertainment, and Recreation, and Accommodation and Food. In September around 95% of all businesses had resumed trading, although this was a much lower proportion in Arts, Entertainment and Recreation (69.4%) and in Accommodation and Food (84.8%).

The BICS suggests that the current proportion of staff on furlough has fallen from 32% in June to around 15% in September. However, the Fraser of Allander Institute raised the question of whether these workers will be brought back at all.² For those still on furlough, this ranged from 6.3% in the Wholesale, Retail, and Repair of Vehicles sector up to 57.5% in Art, Entertainment, and Recreation.

In the period 24th August to the 6th of September just 1.5% of businesses had

2 <https://fraserofallander.org/scottish-economy/why-is-the-labour-market-data-proving-so-resilient-so-far-during-this-crisis/>

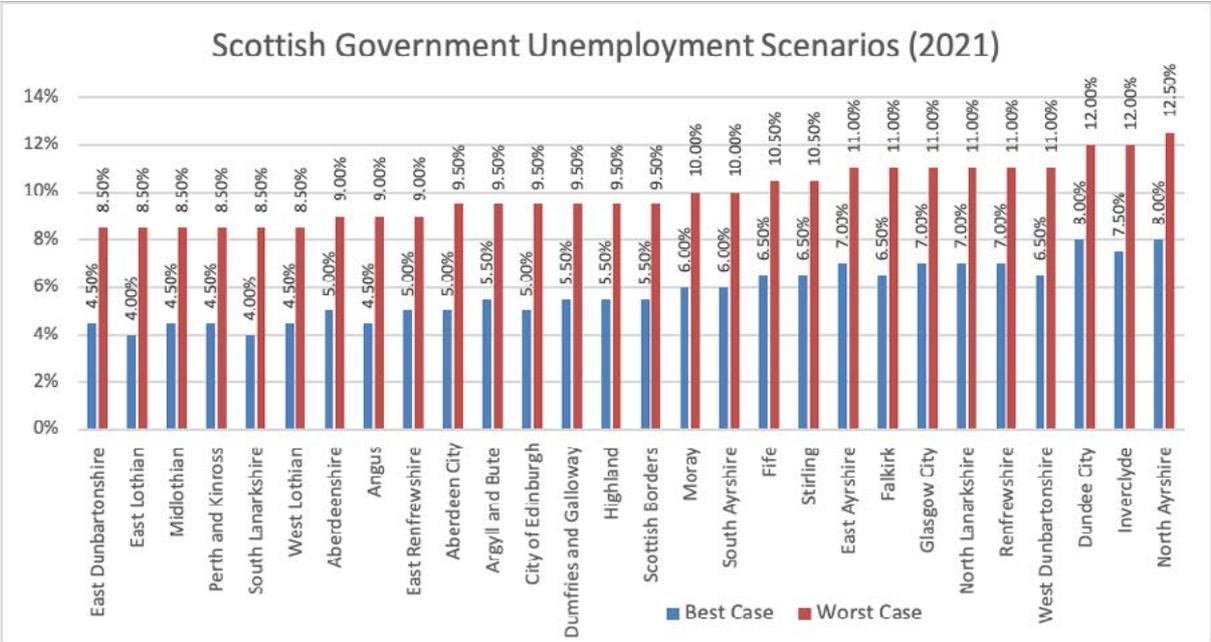
permanently stopped trading, mainly in Accommodation and Food services (6.5%). Although no businesses in Arts, Entertainment, and Recreation reported having permanently ceased trading, 22.4% said that they had paused trading and had no intention of reopening in the next two weeks.

4.9 Models of Unemployment

According to the Scottish Government’s State of the Economy Report published at the end of September, the impact of the pandemic on the labour market in 2020 has varied across different types of employment, sectors and industries. This is often dependent on the ability for jobs to be done from home and whether businesses have been forced to close. The Job Retention Scheme and Self Employed Income Support Scheme have supported the labour market since their introduction earlier in the year and helped to retain employment for people who otherwise may have been made redundant. However, these are due to end on 31st October therefore unemployment rates are expected to rise in the months ahead.

As local authority labour market projections have still to be publicised, Chart 8 below sets out a model of unemployment scenarios for local authorities based on the Scottish Government data, in terms of best and worst cases. These estimates assume that each local authority’s labour market will follow the national trend, with estimated unemployment rates rounded to the nearest 0.5%.

Chart 8



**Note data not available for Clackmannanshire, Eilean Siar, Orkney Islands and Shetland Islands Councils due to their unemployment estimates for 2019 being statistically unreliable or too small to quantify.*

5. Impacts on Industry

There are some industries that have performed well, or at least experienced a much lesser impact than others. Some were badly affected by the initial lockdown period, but have recovered quickly since those restrictions have been lifted. However, if there were to be further lockdowns imposed, that may leave these industries vulnerable. In general, those industries where jobs can be done remotely have performed best, while those that do not require face to face interaction have also recovered strongly. Broadly speaking all industries saw some downturn in Scotland with three exceptions: food retail, real estate, and public sector administration. Some of the industries that have performed most strongly in both Scotland and the UK include:

- Construction was badly impacted by the lockdown, but has bounced back strongly, with falling levels of furloughed staff, high levels of job vacancies, and 100% of businesses reporting that they are now operating. In output terms there was a strong recovery in May and June;
- Agriculture (and fishing and forestry) saw a relatively small downturn in output, which has recovered quite quickly. There were also a very small number of staff furloughed from this sector;
- The Information and Communications sector reported 100% of businesses operating in September, with a relatively low percentage reporting a decrease in business volume. The sector also saw low numbers of staff furloughed at 17%. KPMG has predicted a growth in the Telecoms sector in 2020;
- The Financial and Insurance sector experienced minimal negative impacts of lockdown, with output down by just over 3%, and only 5% of staff placed on furlough. There were also a relatively high number of vacancies within accounting and finance in July;
- Real estate in Scotland was not affected negatively by the initial lockdown, but has experienced very slow growth in output every month since March. KPMG has not forecast growth in this sector for the UK as a whole in 2020, suggesting that the Scottish property market may have been slightly more resilient than the UK overall;
- Food Retail experienced very strong growth in GDP output and business turnover in March and again in May and June. Retail as a whole has performed less strongly, with a significant drop in April, but recovery in May and June. Wholesale and Retail as a broader sector also appeared to be back to full capacity by September, but with some businesses ceasing to trade. KPMG has forecast the Retail sector to grow in 2020.

5.1 Impact on Local Authorities

In Scotland in 2018, around 22.6% of employment was within the stronger performing sectors outlined above, or the public sector. Island authorities in particular were heavily reliant on these sectors for employment, with 46% of people employed within these in Eilean Siar, 36.3% in Orkney Islands and 34% in Shetland Islands. However,

some mainland councils were also very reliant on these sectors, accounting for over 25% of employment in Argyll and Bute, City of Edinburgh, Highland, and Perth and Kinross councils. In many of these areas a large proportion of employment is within the Agriculture industry, whilst Edinburgh is heavily reliant on the Financial Services and Information and Communications sectors. Although these sectors have been relatively resilient to the negative impacts of Covid-19, there are a number of other sectors within these areas that are at risk, for example Tourism in Argyll and Bute and Edinburgh.

5.2 Sources of Sectoral Impact

The **Business Impacts of Coronavirus Survey** covers Scotland as a whole and provides a breakdown of all industries with a presence in Scotland and more than ten employees. For the period 24th August - 6th September this showed strong recovery in some industries. Construction seems to have recovered strongly from 67.8% trading in mid-June to 100% trading. The Manufacturing, Transport and Storage, and Information and Communications sectors had also returned to 100% capacity and appear to have begun trading again quite quickly. These industries also reported that no businesses had permanently ceased trading.

The **Scottish Government Monthly GDP Output Estimates** for July showed that every sector of the economy recorded a fall in output between February and July while the economy as a whole recorded a 10.7% decline over this period. Although Retail has seen a sharp fall in output, Food Retail has performed very strongly. The industries that saw the smallest drop (under 5%) were: Manufacturing, Electricity and Gas Supply, Water Supply and Waste Management, Wholesale, Retail, and Motor Trades, Real Estate, Financial and Insurance, and Public Administration. There was strong recovery in June and July, which is likely to continue into August/September based on the BICS, for several industries including all of the industries within the Production Sector, Construction (see BICS for September), and Wholesale, Retail, and Motor Trades. However, in general, industries within the Service Sector have not recovered as quickly as Construction or Production.

The **Scottish Government Monthly Business Turnover Index** for July showed that almost all sectors reported a significant drop in turnover, with the exception being Food Retail, which saw some growth. In general, Manufacturing saw a smaller reduction than the Service Industry. Communications was the highest performing service outside of Food Retail.

The **Coronavirus Job Retention Scheme Statistics** showed that the sectors with the lowest percentages of furloughed staff in Scotland included Public Administration and Defence (1%), Finance and Insurance (5%), Education (7%), Health (9%), and Energy Production (12%). The BICS suggested that Wholesale and Retail, and Manufacturing initially had high proportions of staff on furlough at 44% and 41% respectively, but these numbers reduced significantly over time. Between June and August the lowest numbers of new furloughed staff were in Energy Production (no new furloughs); Agriculture, Forestry and Fishing (100 new furloughs); Mining, Quarrying, and Utilities (100 new furloughs), Waste and Recycling (100 new furloughs), and Finance and Insurance (200 new furloughs). This data also showed the total number of employees in the UK on furlough by sector and date. Between April and June there were large decreases in

those on furlough in the Construction, Mining, Quarrying and Utilities, and Waste and Recycling sectors. Each of these saw decreases of over 25% in this time period.

The KMPG UK Economic Outlook for September predicted that, at a UK level, several industries will experience growth by the end of 2020 compared to 2019. These include Pharmaceuticals, Scientific R&D, Electronics, Telecoms, Postal Services, Auxiliary Financial Services, Banking, Retail, Veterinary Services, Education, Public Administration, and Office Admin and Business Support. These are all expected to continue to grow in 2021.

The **Adzuna Employment Data** is available at UK level and shares details on the number of vacancies by sector. Vacancies in a sector indicate that it is doing well and businesses are able to take on new employees. In July, Healthcare and Nursing was the sector with the greatest number of vacancies, followed by IT, Teaching, Social Work, Engineering, Accounting and Finance, and Trade and Construction. However, most sectors now have substantially fewer vacancies than in March 2020, indicating that businesses are not in a position to employ new staff.

6. Good Practice in Local Authority Responses

Local authority economic development teams have played a critical role in both the initial response to the pandemic and subsequent economic crisis, as well as the ongoing recovery efforts. In the majority of local authorities, economic development staff were redeployed to assist in the assessment and distribution of business support grants and have only recently returned to their main roles. This has put significant pressure on a service in which resources are often already overstretched.

Many local authorities have now published their Recovery Strategies, setting out plans for tackling the ongoing economic challenges brought about by the new ways of living and working. This is made even more challenging by the uncertainty that remains around the ongoing health crisis and what future restrictions might entail. The plans recognise that there will not be a return to 'normal' in terms of previous ways of working, and there is a focus on shifting towards a more preventative approach. Many of the plans recognise that 'agile' thinking and 'scenario planning' will be crucial, as it is extremely difficult to predict what the future will hold for local authorities. It is therefore more useful than ever for local authorities to look to each other for examples of good practice in recovery planning and identify opportunities to share learning and collaborate to a much greater extent. A combination of better partnership working, utilisation of technology and new operating models are likely to be required going forward, and the case studies below set out how some local authorities have adapted and responded to the crisis.

6.1 Business Gateway Tayside – Covid-19 Survive and Thrive Programme

The Covid-19 Survive and Thrive Programme was designed in April 2020 as a flexible, locally orientated response to businesses affected by the crisis. Business Gateway Tayside intended this programme to be the “front door” for access to support, in order to minimise market confusion and deliver a rapid response for businesses affected by the situation. As of the end of August, 113 businesses from across the Tayside region had been approved into the service and were well on the way to receiving a minimum of 7 hours support.



Key features of the support include business model reviews, identification of alternative revenue streams and opportunities for diversification, digitisation support, risk mitigation, and HR and risk assessment support for re-opening. One of the key findings of the programme was that introducing this survival service has allowed Business Gateway Advisers to also spot opportunities for diversification, innovation and digitisation within existing local businesses that have inspired growth ambition. Unexpectedly, many of these businesses have been able to be entered into the Business Gateway Growth Service where they can now receive support for up to 18 months, ensuring they have access to the best services to support their goals.

One of the businesses to receive this support is The Old Manse of Blair. Ms MacDonald, the owner of the business praised the advice and support she has received from Business Gateway. The organisation has helped her navigate the government furlough scheme and identify new markets. She said: “The expert advice from Business Gateway has been invaluable in guiding us through the process of re-evaluating the business, from financial planning to HR issues during what was an extremely challenging period”.

6.2 Creative Industries in Aberdeen City and Shire

Covid-19 has greatly impacted on regional Creative Industries in Aberdeenshire, with galleries and museums closed due to lockdown and the cancellation of hundreds of regional and national events including exhibitions, summer showcases, arts markets and Open Studio Events.

North-East Open Studios (NEOS) is a not for profit organisation dedicated to promoting arts and crafts in the North-East of Scotland through its creativity-focused events every September. Each year, NEOS shines a light on regional creatives, with more than 300 creative businesses and sole traders in Aberdeenshire and Aberdeen City coming together to take part. It provides the perfect platform for Creatives in the North East to open their studios and homes for prospective customers to browse or purchase their work. In 2019, an impressive 25,080 visitors attended NEOS over the nine days, and the event had a direct economic impact of over £100,000 to Aberdeen City & Shire.



This year, NEOS ran from 12th – 20th September, but due to the impact of the Covid-19 pandemic, it is important that the event had the capacity to run online as well as welcoming visitors to creative spaces across the region. In response to this, Aberdeenshire Council’s Economic Development team worked in collaboration with NEOS and Business Gateway to undertake a Digital Skills Survey of NEOS members looking at how their creative businesses engage with digital platforms. The results highlighted a skills gap in Digital Marketing and Effective Ecommerce. For Creative Industries to survive in the region, this gap required to be addressed.

Based on the survey results, and working with Business Gateway Aberdeen City and Shire (BGACS), a bespoke suite of seven webinars for those who wanted to be part of the 2020 NEOS were created. The webinar series specifically focused on how to develop an effective digital presence to entice and engage customers through using website and social media pages. Courses covered WordPress; Facebook and Instagram; Search Engine Optimisation; Photography for Business; Facebook for Business; Instagram for Business and Effective eCommerce. BGACS delivered the webinars over a period of seven days and saw over 190 delegates attend, with each stating they were ‘very satisfied’ with the webinar content. The positive outcome is that the 2020 NEOS festival went ahead, with a range of businesses registered to exhibit physically and, if required, digitally.

6.3 North Ayrshire – Community Wealth Building

North Ayrshire Council launched Scotland’s first Community Wealth Building strategy in May 2020. It sets out how the council will work in partnership with local communities, businesses and wider regional anchor institutions to create a fairer local economy to tackle poverty and inequality, embedding a new economic model focused on wellbeing and inclusion. The strategy includes actions to support more local businesses to bid for public sector contracts and to create fairer jobs. North Ayrshire will work to ensure public land and assets can be used more effectively to meet community and local business needs, as well as to help tackle climate change. The Council will also aim to broaden business ownership through supporting the development of co-operatives, employee ownership and social enterprises, and are exploring the feasibility of a community bank. The new [strategy](#) sets out the CWB mission of ‘Enhancing local wealth and the creation of fair jobs, and maximising the potential of places through working in partnership with communities and businesses’. The strategy set out six objectives to deliver CWB:

- **Community Wealth Building Council:** Working across all services and wider local and regional partners to implement Scotland’s first approach to Community Wealth Building.
- **Procurement:** Using spend to actively encourage and support a growing, diverse and resilient local business base, and to support net zero carbon ambitions.
- **Fair Employment:** Encouraging the creation of fair and meaningful jobs with progression opportunities to unlock the potential of residents.
- **Land and Assets:** Supporting the wider regeneration of communities by maximising all of land and assets including through alternative uses for community and business benefit.

- **Financial Power:** Investing locally and encouraging regional and national institutions to invest in communities.
- **Plural Ownership of the Economy:** Supporting the creation and sustainability of a range of business models including SMEs, social enterprise, employee ownership, cooperatives, municipal activity and community enterprises.

In September 2020, the Council launched its Economic Recovery and Renewal Approach to build back better, fairer and greener. The approach is based on the foundation of the Council’s Community Wealth Building approach and sets out a Local Green New Deal. At the heart of this is an £8.8m Investment Fund which will support an inclusive and green economic recovery.

Since the pandemic started the Council’s Business Development Team have been proactively engaging businesses and social enterprises to understand their challenges and helping them navigate the support mechanisms released by the UK and Scottish Governments. They have supported 1,443 businesses with over 12,000 different interventions and are currently working with 200



businesses on recovery plans. The Council has launched a ‘Keep it Local’ campaign as part of the wider Community Wealth Building approach. The need for local people, businesses and Anchor Institutions to spend locally is an essential pillar of that strategy and the Council are supporting that need by urging people and businesses to ‘Keep it Local’.

6.4 Reactive and adaptive - Stakam’s mission to tackle the lockdown!

Stakam is a chemical manufacturing company located in Arbroath which has been crafting chemicals to client requirements since 2016. As the Covid-19 crisis unfolded, Stakam changed its business model and one third of production was converted to producing hand sanitiser, becoming the only company in Scotland to craft the essential polymer thickening agent. This diversification was so successful that Stakam was able to increase its headcount by a third, despite the ongoing crisis.

Stakam’s success story came about when it was contacted by a US based company who requested a product that was suitable to thicken hand gels. This request drove the company to get creative and, after three attempts, Stakam chemists had formulated a product that appeared acceptable for the client. It was sent over to a third party for testing and it met the client’s requirements. Stakam has now produced over 22,000

bottles of hand sanitiser as well as supporting the local community throughout the crisis. This included donating 10% of hand sanitiser profits to a local charity and delivering hand sanitiser to an array of local businesses to ensure they were ready to get back to work.

Angus Council's Business Gateway contractor has supported Stakam throughout the crisis and have sent a procurement specialist into the business to help them get ready for tendering. They have also provided support around Stakam's growth plans and NDA contracts for employees to ensure risks have been considered prior to expanding into other countries. The end goal is to get Stakam into the SE Pipeline when this reopens.



The Angus Council Economic Development service has advised Stakam to use its new Angus Jobs Portal for recruitment and aftercare support, as well as looking at work placement opportunities via the Skills Team employability contracts. The team has also put Stakam forward as a potential supplier of PPE to the council's Emergency Response team and the NHS. The company started out in one of Angus Council's property portfolio units but, as a result of the support received, it has now outgrown what the council has to offer and has moved to a larger private unit in another town.

6.5 Fife Council Adapts to Support Businesses to Respond, Restart and Recover

Throughout lockdown, Fife Council's Economic Development Team worked actively to ensure it remained agile. It provided a wide range of flexible support and advice to businesses to help them remain resilient and sustainable, assisted its business property tenants and adapted Business Gateway Services to ensure that businesses could continue to access advice and support from local business advisers and specialists. In April, the team's quarterly newsletter *Fife Business Matters* moved to a monthly online update, bringing local businesses timely information, news and guidance. Economic Development officers also worked with other council services to deliver grants totalling £57.1 million from the Scottish Government's Coronavirus Business Support Fund to over 5,100 businesses across Fife in a true collaborative and partnership approach.

The team has supported businesses by repurposing local financial programmes. Fife Council Grant funding usually helps support and encourage small companies in Fife to invest and grow. Throughout the Covid-19 crisis this funding has been used to support the development of online trading capabilities and new processes to ensure sustainability of businesses and their workforce.

The team has also refreshed its inward investment proposition and a new InvestFife

website and brand were launched to provide a one-stop-shop to the latest guidance and information to support local development as well as attract new investment opportunities into Fife.

As town centre businesses were some of the worst affected by lockdown measures, the Council's Town Centre Unit set up a cross-service Town Centre Restart Group. During lockdown, BID companies and community groups were supported to set up online trading platforms in Kirkcaldy, Cupar and St Andrews. A Town Centre Business Reopening and Recovery Survey was carried out in June and the feedback from this was used to inform the Council's safe management of town centres as they started to reopen. A programme of measures funded through the Scottish Government/Scotland's Towns Partnership Towns and BIDS Resilience and Recovery Fund and Scottish Government/Sustrans Spaces for People Fund is now being implemented.



One of the projects funded by the Resilience and Recovery Fund was a Town Centre Small Business Safety Grant Scheme. Designed to help businesses reopen safely as restrictions eased, the scheme supported over three hundred small businesses in Fife's main town centres with a £100 grant to help with the cost of public health and safety

measures. The grants funded the purchase of PPE, hand sanitisers, protective screens and internal signage. Councillor Altany Craik, Convener of Fife Council's Economy, Tourism, Strategic Planning and Transportation Committee said: "As we welcome people back to Fife's town centres, this new grant has given much-needed help to many of our smaller businesses as they try and recover from lockdown. Shops, cafes and offices have benefitted, giving added confidence and comfort to staff and customers alike, to stay local and spend locally."

A series of promotional videos has been commissioned for use in a social media 'buy local' campaign and recovery plans are being drawn up for each town and local shopping centre.

6.6 South Ayrshire Council and SDP – Virtual 'Meet the Buyer'

South Ayrshire Council has an ongoing commitment to engage with new and existing suppliers, and achieves this through local engagement events and training, as well as participation in the Supplier Development Programme's (SDP) annual 'Meet the Buyer' event. Following the cancellation of the 2020 event, SDP Scotland planned virtual activities that aimed to facilitate communication with suppliers and contribute to open, connected and transparent procurement practices in Scotland's public sector during the restrictions.

South Ayrshire Council participated in a takeover of SDP’s Twitter account during the virtual Meet the Buyer event in June, and suppliers were encouraged to ask real time questions to the Procurement Team on the topic, “Exploring Quick Quotes”. The team tweeted general tips about optimising the Supplier Finder Profile on Public Contracts Scotland (PCS), as well as the finer details involved in bidding for Quick Quotes. This was complemented by two free SDP tender training webinars on ‘Dynamic Purchasing Systems and Frameworks’ with Scotland Excel, and a “how-to” interactive session on using PCS.



“Working with SDP promotes the Council’s business to a far wider audience than we could hope to capture ourselves. Interest from suppliers in either bidding for specific opportunities, or in just making themselves known to the relevant internal services, is invaluable for the Council’s efforts to achieve ‘best value’ in procurement” said Gavin Cockburn, Acting Service Lead for South Ayrshire Council Procurement.

South Ayrshire Council’s willingness to trying new technology to contribute to open and connected procurement was supported by SDP Scotland. The council also featured a blog on the SDP website on the topic, “Exploring Quick Quotes with South Ayrshire Council,” which outlined the local authority’s specific process for procurement of goods, works and services valued between £10,000 and £49,999.

Feedback was sought from suppliers about their SDP webinar experience. In total, 79% of respondents said that they were more likely to bid for future public sector contracts after attending SDP training during the virtual Meet the Buyer event.

6.7 East Renfrewshire’s New Town Centre Covid Recovery Groups

The easing of lockdown comes with new restrictions, fears and concerns, not only for local businesses and traders, but also town centre users and residents. In response to this East Renfrewshire Council’s Economic Development Team has taken the opportunity to create new Town Centre Covid Recovery Groups to ensure our Town & Village Centres are able to re-open safely for the benefit of everyone.

These are multi-agency groups with representatives from BIDs, Council, Chamber of

Commerce, local resident, community & third sector groups, Police, Traders, Community Development Trusts, and Federation of Small Businesses etc. Regular online meetings take place to discuss a variety of issues including available funding and support, alerting Council to business & user needs, signposting information, raising awareness of new legislation, local campaigns, etc. The meetings ensure the right people are being alerted to any changes, issues and information.



The groups helped support a number of joint initiatives to ensure those most in need of support and assistance received it. They allow the Council to see issues from a number of different perspectives and be more responsive to the needs of the community. Through these groups, we were able to agree a course of action for safely reopening our town centres and secured funding to put plans into action to assist businesses and users alike. A number of the agreed actions were actually delivered by group members (i.e. Voluntary Action East Renfrewshire, Chamber of Commerce, BIDs etc.) who were best placed to deliver specific initiatives quickly, through their previously established contacts and strong connections within the town & village centres. Pooling the groups resources, ensured all initiatives supported and built on the work of others and helped ensure duplication of efforts was avoided.

Although these groups have been created to help deal with the fallout of the Coronavirus, the Council's ambition is that they will evolve over time and continue in one form or another to continue to bring the necessary people together for the long term benefit, growth and sustainability of our town and village centres.

6.8 Angus Job Search – A Covid-19 Response

As part of Angus Council's Economic Development team's response to the Covid-19 pandemic, they worked with their existing MIS provider, Hanlon Software Solutions, to launch a job matching portal. Hanlon launched their first portal after being approached by the Edinburgh Capital City Partnership as the impact of lockdown started to hit. Such was the impact of the pandemic, they then offered to roll out the portal initiative across other Council areas.

The portal links people who are unemployed or under threat of redundancy as a result of Covid-19 to job opportunities, especially those in key services, or volunteering opportunities. It is also beneficial to local businesses with job vacancies, giving them access to a pool of locally available labour. Hanlon developed the customised portal free

of charge to the Council, for the people who wish to use it to seek employment and to businesses with job vacancies to fill.

Clients can specify job preferences and receive notifications when suitable jobs are posted. A list of the latest vacancies also appears on the portal's home page, and there is a facility for employers to post their own jobs. There is an option to notify advisors when someone expresses an interest in a job so they can support the client through the process.

Through the 'Support and Information' section, the council is able to identify people who are in need of additional employability support to secure work, complete job applications, build confidence or receive interview advice.

These people are connected to the dedicated Skills Team who offer free advice and support to people living in Angus. The team provide a keyworker, person-centred bespoke service; supporting individual needs through a variety of programmes available. The information gathered through the portal gives valuable insights into the issues that local companies are facing when they are trying to recruit, and allows the council to take steps to address these as part of its recovery planning. It also provides information on job seekers and the barriers that they face.

Looking for
the **right job**

SEARCH

Apply for a new job in Angus.
Access free support to help you
find your next job.

jobs.investinangus.com

INVEST IN ANGUS
Live | Work | Grow

7. Conclusions and Recommendations

Throughout the Covid-19 crisis, the SLAED network has played a key role in facilitating communication between local authorities and in representing their collective perspectives in dialogue with a range of stakeholders and in response to consultations. This collective voice adds significant value to the local government position, and the publication of the annual SLAED Indicators Report helps to demonstrate the significant contribution that local authorities make to economic development across Scotland. The full impact of Covid-19 on local economic development services will not start to become apparent until the 2020/21 report is published next year, therefore this report seeks to bridge this gap.

The impacts of and responses to Covid-19 across Scotland, both at the national and local levels, are constantly evolving, and new information is becoming available on an ongoing basis. This is very likely to be the case for some time with the recent introduction of further virus control measures and resulting support packages. This report therefore seeks to provide a snapshot at the time of publication in terms of impacts and responses of local authorities, and information is liable to change.

However, the Covid-19 crisis has called current practice in both local and national economic development into question and highlighted the importance of accelerating the move to a new economic model which prioritises wellbeing and inclusion in addition to growth. It has highlighted that a shift in focus is needed from solely increasing GDP, towards an economy with a range of priorities for the benefit of all citizens. This includes addressing the escalating challenges around climate change and tackling growing inequalities, which some local authorities had begun to explore prior to the crisis. There is a growing understanding that the economic stimulus and job creation potential that improvements in these areas will result in will be critical to recovery. However, this will require significant buy-in across all levels of government, with greater autonomy allowed to local authorities to make the most effective decisions for their local areas, as well as the funding needed to take these forward.

8. Further Information

This report is intended as a supplement to the main annual SLAED Indicators Report for 2019/20. The SLAED Performance Group, with support from the Improvement Service, is responsible for managing the SLAED Indicators Framework.

Please email slaed@improvementservice.org.uk if you have any queries regarding this report.

Appendices

9. Appendix 1 - Chart Data

Data for each of the charts in section 4 is set out in the tables below.

Chart 1 – Claimant Count by Local Authority

Council Area	March 2020	August 2020
Aberdeen City	2.70%	5.90%
Aberdeenshire	1.80%	4.20%
Angus	2.90%	5.90%
Argyll and Bute	3.00%	6.30%
City of Edinburgh	2.00%	5.20%
Clackmannanshire	4.20%	7.10%
Dumfries and Galloway	3.30%	5.80%
Dundee City	4.50%	7.60%
East Ayrshire	4.80%	8.30%
East Dunbartonshire	1.90%	4.70%
East Lothian	2.60%	5.60%
East Renfrewshire	1.70%	4.30%
Eilean Siar	3.00%	5.70%
Falkirk	3.30%	6.30%
Fife	3.80%	6.90%
Glasgow City	4.50%	8.70%
Highland	2.50%	5.90%
Inverclyde	4.50%	6.80%
Midlothian	2.60%	5.60%
Moray	2.70%	5.20%
North Ayrshire	5.50%	9.00%
North Lanarkshire	3.70%	7.40%
Orkney Islands	1.50%	3.20%
Perth and Kinross	2.00%	5.10%
Renfrewshire	3.50%	6.90%
Scottish Borders	2.80%	5.70%
Shetland Islands	1.90%	4.00%
South Ayrshire	4.20%	7.50%
South Lanarkshire	3.50%	6.90%
Stirling	2.50%	5.20%
West Dunbartonshire	5.10%	8.70%
West Lothian	2.90%	6.10%

Chart 2 – Total Value of Grants Awarded (£m)

Council Area	Value of Grants Awarded (£m)
Aberdeen City	£28.84
Aberdeenshire	£43.10
Angus	£21.21
Argyll and Bute	£36.98
City of Edinburgh	£103.93
Clackmannanshire	£7.55
Dumfries and Galloway	£42.95
Dundee City	£26.44
East Ayrshire	£20.16
East Dunbartonshire	£12.71
East Lothian	£17.64
East Renfrewshire	£9.79
Eilean Siar	£9.18
Falkirk	£24.36
Fife	£58.26
Glasgow City	£120.08
Highland	£73.67
Inverclyde	£11.25
Midlothian	£13.75
Moray	£19.21
North Ayrshire	£24.24
North Lanarkshire	£41.86
Orkney Islands	£8.29
Perth and Kinross	£36.98
Renfrewshire	£27.20
Scottish Borders	£33.58
Shetland Islands	£8.25
South Ayrshire	£23.33
South Lanarkshire	£44.09
Stirling	£23.85
West Dunbartonshire	£14.50
West Lothian	£27.26

Chart 3 – Percentage of Workers Furloughed

Council Area	% of Workers Furloughed
Aberdeen City	32%
Aberdeenshire	29%
Angus	31%
Argyll and Bute	31%
City of Edinburgh	30%
Clackmannanshire	31%
Dumfries and Galloway	30%
Dundee City	31%
East Ayrshire	32%
East Dunbartonshire	28%
East Lothian	31%
East Renfrewshire	30%
Eilean Siar	24%
Falkirk	31%
Fife	29%
Glasgow City	34%
Highland	35%
Inverclyde	26%
Midlothian	30%
Moray	34%
North Ayrshire	31%
North Lanarkshire	33%
Orkney Islands	27%
Perth and Kinross	34%
Renfrewshire	33%
Scottish Borders	30%
Shetland Islands	25%
South Ayrshire	34%
South Lanarkshire	32%
Stirling	33%
West Dunbartonshire	31%
West Lothian	31%

Chart 4 – Percentage Change in Nominal GVA 2018-2021

Council Area	% Change in Nominal GVA
Aberdeen City	-1.2%
Aberdeenshire	-2.2%
Angus	-2.2%
Argyll and Bute	-0.8%
City of Edinburgh	0.5%
Clackmannanshire	-0.5%
Dumfries and Galloway	-1.2%
Dundee City	0.3%
East Ayrshire	-1.1%
East Dunbartonshire	0.6%
East Lothian	1.3%
East Renfrewshire	1.2%
Eilean Siar	-0.6%
Falkirk	-2.1%
Fife	-1.4%
Glasgow City	0.4%
Highland	-0.5%
Inverclyde	0.0%
Midlothian	2.3%
Moray	-2.3%
North Ayrshire	-1.1%
North Lanarkshire	-1.0%
Orkney Islands	-1.8%
Perth and Kinross	-0.4%
Renfrewshire	-1.4%
Scottish Borders	-1.0%
Shetland Islands	-1.7%
South Ayrshire	-1.2%
South Lanarkshire	-1.1%
Stirling	-0.5%
West Dunbartonshire	-0.8%
West Lothian	1.0%

Chart 5 – Percentage Change in Retail Footfall (Feb-Sept 2020)

Council Area	% Change in Retail Footfall
Aberdeen City	-34.4%
Aberdeenshire	-7.2%
Angus	5.7%
Argyll and Bute	25.5%
City of Edinburgh	-31.6%
Clackmannanshire	-1.4%
Dumfries and Galloway	2.3%
Dundee City	-13.5%
East Ayrshire	-10.2%
East Dunbartonshire	-2.2%
East Lothian	-2.4%
East Renfrewshire	-4.4%
Eilean Siar	-
Falkirk	-7.6%
Fife	-9.9%
Glasgow City	-29.6%
Highland	16.2%
Inverclyde	-14.7%
Midlothian	-3.9%
Moray	-1.5%
North Ayrshire	0.7%
North Lanarkshire	-13.1%
Orkney Islands	-
Perth and Kinross	-1.3%
Renfrewshire	-11.5%
Scottish Borders	2.1%
Shetland Islands	-
South Ayrshire	-8.4%
South Lanarkshire	-5.8%
Stirling	-13.7%
West Dunbartonshire	-10.9%
West Lothian	-10.1%

Chart 6 – Percentage of Jobs Workable from Home

Council Area	% of Jobs
Aberdeen City	41.4%
Aberdeenshire	41.1%
Angus	33.7%
Argyll and Bute	37.0%
City of Edinburgh	49.0%
Clackmannanshire	39.1%
Dumfries and Galloway	36.6%
Dundee City	36.7%
East Ayrshire	38.8%
East Dunbartonshire	45.5%
East Lothian	45.4%
East Renfrewshire	48.6%
Eilean Siar	34.0%
Falkirk	38.0%
Fife	40.1%
Glasgow City	41.4%
Highland	34.3%
Inverclyde	39.2%
Midlothian	40.9%
Moray	32.0%
North Ayrshire	35.1%
North Lanarkshire	36.6%
Orkney Islands	33.7%
Perth and Kinross	38.0%
Renfrewshire	40.2%
Scottish Borders	37.7%
Shetland Islands	36.3%
South Ayrshire	39.5%
South Lanarkshire	41.6%
Stirling	42.2%
West Dunbartonshire	36.6%
West Lothian	38.1%

Chart 7 – Percentage Difference in GVA Compared to Scotland (July 2020)

Council Area	% Difference
Aberdeen City	-0.62%
Aberdeenshire	1.39%
Angus	0.70%
Argyll and Bute	-1.88%
City of Edinburgh	0.45%
Clackmannanshire	0.71%
Dumfries and Galloway	0.57%
Dundee City	-1.66%
East Ayrshire	0.10%
East Dunbartonshire	1.17%
East Lothian	-0.83%
East Renfrewshire	0.84%
Eilean Siar	0.51%
Falkirk	-0.91%
Fife	-0.35%
Glasgow City	-0.48%
Highland	-1.19%
Inverclyde	-1.45%
Midlothian	-1.14%
Moray	1.60%
North Ayrshire	0.44%
North Lanarkshire	1.02%
Orkney Islands	-1.11%
Perth and Kinross	-0.59%
Renfrewshire	-0.85%
Scottish Borders	1.40%
Shetland Islands	-1.77%
South Ayrshire	-0.40%
South Lanarkshire	0.87%
Stirling	-0.95%
West Dunbartonshire	1.22%
West Lothian	1.25%

Chart 8 – Scottish Government Unemployment Scenarios

Council Area	Best Case	Worst Case
Aberdeen City	5.0%	9.5%
Aberdeenshire	5.0%	9.0%
Angus	4.5%	9.0%
Argyll and Bute	5.5%	9.5%
City of Edinburgh	5.0%	9.5%
Clackmannanshire	3.0%	7.5%
Dumfries and Galloway	5.5%	9.5%
Dundee City	8.0%	12.0%
East Ayrshire	7.0%	11.0%
East Dunbartonshire	4.5%	8.5%
East Lothian	4.0%	8.5%
East Renfrewshire	5.0%	9.0%
Eilean Siar	3.5%	7.5%
Falkirk	6.5%	11.0%
Fife	6.5%	10.5%
Glasgow City	7.0%	11.0%
Highland	5.5%	9.5%
Inverclyde	7.5%	12.0%
Midlothian	4.5%	8.5%
Moray	6.0%	10.0%
North Ayrshire	8.0%	12.5%
North Lanarkshire	7.0%	11.0%
Orkney Islands	-	-
Perth and Kinross	4.5%	8.5%
Renfrewshire	7.0%	11.0%
Scottish Borders	5.5%	9.5%
Shetland Islands	-	-
South Ayrshire	6.0%	10.0%
South Lanarkshire	4.0%	8.5%
Stirling	6.5%	10.5%
West Dunbartonshire	6.5%	11.0%
West Lothian	4.5%	8.5%

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