
Informing, Inspiring, Influencing

Annual Review 16/17



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for Development
and Industry

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Chairman's Message



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SCDI is Scotland's Economic and Social Forum, utilising the collective capability of our team, Board and membership to take a long view on Scotland's economy. We are determined that our collective efforts result in making a difference on the ground and to everyone, everywhere in Scotland.

In a year where uncertainty is the new constant, SCDI has embarked upon a significant programme of change with an urgency and rigour as befits Scotland's opportunities and challenges domestically, nationally and globally. The appointment of our new CEO in May 2017 led quickly to a review with members and stakeholders, supported by objective and experienced external consultants.

It is clear that SCDI is held in huge affection by its diverse membership, a group which is both capable and eager to move from being actors in our economy to being architects of Scotland's economic future. The Board and team have accepted the challenge of re-setting our agenda, with a level of ambition commensurate with opportunities and challenges which

we collectively face. This means focusing at a macro-economic level, whilst ensuring relevance to our members at regional level.

As a business leader I am very aware that SCDI needs to focus on its unique contribution to the conjoined issues facing Scotland's economy and society. In ever more constrained and unsettled times, SCDI needs to understand and exploit its unique capabilities. I think there are three:

- ① SCDI's breadth of membership enables us to form policy recommendations which uniquely balance the perspectives of private, public and not for profit organisations.
- ② Whilst alert to the global economy and the impact for example of the

London economy on domestic policy, our unique focus on Scotland means we are not distracted by agenda in other place.

- ③ Our interest in focusing our members' attention not on the short term, but on the medium term opportunities and challenges which face us collectively. As one member recently put it, 'We want SCDI to be ahead but in sight.'

In the year ahead we will focus more on these strengths as we add value, through you to Scotland.

Brendan Dick,
SCDI Chairman

Further reading

Annual Review

http://bit.ly/AnnualReview16_17

Chief Executive's Report



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I look forward to working with, and for, you in the future as we ensure that SCDI continues to be relevant, engaged and focused on identifying opportunities and solutions to Scotland's economic circumstances.

With the commitment of our network we have begun to embark on the process of thinking beyond a digital age – after all we are in it – and to start thinking about the changes we will face in a post digital economy and society. We are determined to do this because we believe that serious future planning is being held hostage to the indecision which results from unprecedented uncertainty. Writing a Blueprint for an Inclusive Economy to 2030 will be the focus of SCDI's Forum on 3rd and 4th May 2018. This is a collaborative event for all of Scotland's leaders, supported by analysis and comment from thinkers and contributors from Scotland and further afield.

Of course, there is work to do in the short term including SCDI's influential policy work on Brexit, International Trade, Industrial Strategy, Rural Economy, Taxation, Data and the challenges posed by an economic model which, along with other factors, has led to increasing inequality and significant questions about the provision of public services.

We do this because SCDI has always been foremost an agency which challenges the economy to deliver its best for all of Scotland. We achieve this by thinking deeply with you, our membership, and applying rigour and objectivity that comes from SCDI's broad membership. But we are not a blue skies think tank.

To achieve this collective ambition, we have made changes which ensure our focus and competence is directed to matters which are relevant to members, our economy and society.

We have a re-vitalised team with new competencies. I am pleased that I joined an organisation with such ambition and support from membership and stakeholders. I look forward to working with, and for, you in the future as we ensure that SCDI continues to be relevant, engaged and focused on identifying opportunities and solutions to Scotland's economic circumstances.

**Mark Bevan,
Chief Executive**

Vision & Mission

Vision

Our businesses, public services and people are thriving through sustainable growth in an economy which enables all of Scotland's communities to flourish.

Mission

To catalyse action by all of those in civic society who can contribute to sustainable growth in an economy which ensures that businesses, public services, people and communities are thriving.

Policy

SCDI's policy priority was to continue to influence and inspire actions by government and our members based on the recommendations in *From Fragile to Agile*, our Blueprint for growth and prosperity in the Scottish economy, but in the new context of the UK's vote to leave the EU.

Our Forum, 'Brave New Worlds? – Economic Growth & Wealth Creation'¹, once again brought together policy-makers and leaders from our diverse membership to progress our shared agenda.

Following the referendum, SCDI, along with SCDI members and other partners, worked with both the Scottish and UK governments as they developed new strategies and support for the economy.

SCDI was very active in influencing the development of the UK's new Industrial Strategy, especially in how it could offer greater benefit to the Scottish economy, meeting Ministers and senior officials in support of a submission to the UK Government produced with members². In the subsequent White Paper, SCDI welcomed the substantial investment which is being made available for innovation challenges, and the increased recognition that the strategy should support all regions, including rural areas, and smaller growth sectors, should develop productivity, innovation and lifelong learning in workplaces, and should give a higher priority to clean growth.

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As a member of the Scottish Government's Ministerial Review Group for the review of enterprise and skills agencies, SCDI supported changes to join-up support for innovation, investment and internationalisation. SCDI took a particularly close interest in the development of a South of Scotland Agency, in engagement with the private sector in the city region growth deal processes and the new regional partnerships, and in protecting the autonomy and strengths of Scotland's higher education and regional bodies, and welcomed the outcomes in these key respects.

Building on our input to the industrial strategy and enterprise and skills support, in 2018 SCDI will be launching a commission on the rural economy which will identify the opportunities and practical actions

to ensure a vibrant, growing and sustainable inclusive rural economy for all.

SCDI's Blueprint called for a fundamental review of business rates in Scotland. SCDI submitted evidence to the Barclay Review of business rates, including more regular revaluations for rates flex with market conditions; use of CPI rather than RPI; and support for productive investments and competitiveness with the rest of the UK. It was very welcome that the Barclay Review also made recommendations on these points and that the Scottish Government has responded positively. This year, SCDI intends to establish a leadership group on the long-term future of tax in Scotland.

Turning to infrastructure, SCDI represented Scottish interests in the development of a major report on a *Vision for UK Infrastructure*³, delivered to the new UK National Infrastructure Commission. SCDI made substantial submissions to the Scottish Government on Scotland's

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On Brexit itself, SCDI partnered with the Scottish Government to organise a National Economic Forum involving senior representatives from all sectors of the Scottish economy, and Brexit was a major area of discussion at SCDI's Forum, International Business Summit and meet the politician events.

Energy Strategy⁴ and reform of the planning system⁵, and has been chairing Transport Scotland working groups on the refresh of Scotland's National Transport Strategy and on high speed rail to Scotland.

SCDI partnered with ScotlandIS, BT Scotland and the Royal Society of Edinburgh on the research report *Smart Citizens, Smart City Regions; Delivering Digital Public Services in Scotland*⁶ which informed and influenced the refresh of the Scottish Government's digital strategy. In early 2018 the partners will publish their

next report, on the Fourth Industrial Revolution and the Scottish economy.

Skills remained a top priority for SCDI and our members. SCDI was a member of the independent STEMEC group, chaired by SCDI Board Member and Deputy Chair Ian Wall, which produced a report⁷ advising the Scottish Government on the development of its draft STEM Education and Training strategy. SCDI also worked with members to submit recommendations⁸ to strengthen the final strategy.

On Brexit itself, SCDI partnered with

the Scottish Government to organise a National Economic Forum involving senior representatives from all sectors of the Scottish economy, and Brexit was a major area of discussion at SCDI's Forum, International Business Summit and meet the politician events. SCDI continued to engage with senior Ministers from both governments and all parties, as well as provide policy submissions to government and parliamentary committees.

SCDI supported the work of a range of parliamentary committees, giving oral evidence to the Economy, Jobs and Fair Work, Education and Skills, Finance and Culture, Tourism, Europe and External Relations committees in Holyrood and the Scottish Affairs Committee in Westminster on behalf of members for a range of inquiries. SCDI also continued to meet with Government Ministers, parliamentarians and senior officials, to organise opportunities for our members to do so, to represent SCDI members in a wide range of meetings, working groups and committees, and to make other submissions on national and regional economic priorities for SCDI members.

References

¹www.scdi.org.uk/events/691-scdi-forum-2017

²www.scdi.org.uk/policy/policy-papers/42-macroeconomy-fiscal-policy/745-scdi-submission-uk-govnt-building-our-industrial-strategy-green-paper

³www.ice.org.uk/news-and-insight/policy/national-needs-assessment-a-vision-for-uk-infrastr

⁴www.scdi.org.uk/policy/policy-papers/44-energy/758-scdi-submission-scottish-govnt-draft-scottish-energy-strategy

⁵www.scdi.org.uk/policy/policy-papers/47-local-economic-development/774-scdi-submission-scottish-govnt-people-places-planning

⁶www.scdi.org.uk/images/document/PDFs-2017/SCDI-SmartCitizensSmartCityRegions-DigitalPublicServicesInScotland-Report-Jan2017.pdf

⁷www.gov.scot/Topics/Education/Schools/curriculum/STEM/STEMEC/Report/FinalSTEMECReport

⁸www.scdi.org.uk/policy/policy-papers/46-skills-productivity/723-scdi-response-to-scottish-govnt-stem-education-strategy

Membership

Over the past 12 months SCDI has continued to engage and work with its members and stakeholders across Scotland, utilising its unique convening power to ensure we continue to drive and create an economy that works for all.

SCDI membership continues to grow and we have been delighted to welcome a whole new range of members, large and small, representative of all sectors and geographies.

We have delivered over 50 strategic events in the past year including political engagement, influencer and thought leadership events through to large conferences and awards dinners. These programmes are generously supported by our members and partners.

The impact of these key gatherings has been to inspire and engage private, public and indeed all aspects of Civic Scotland in the wider economic discussion. This critical input has enabled us to shape and design our strategic thinking and policy activity to ensure Scotland's economy is agile and well placed to respond to the macro-economic challenges and opportunities which lie ahead.

2017/18 and beyond will be no different and we look forward to working with you in the months ahead.

Central Scotland

SCDI continued to inform, influence and inspire the business and political environment across Central Scotland



The SCDI KLM Influencers' Dinner in Inverness.



The Deputy First Minister, John Swinney MSP, was the guest speaker at the Highlands & Islands annual dinner.



SCDI facilitated discussions with international representatives, including the Ethiopian Ambassador.

during 2016/17, through our policy work and aligned engagement and event schedule.

A varied, stimulating and thought-provoking programme in excess of 30 events was delivered and allowed members and stakeholders to participate and contribute to Scotland's economic growth.

The Annual Forum remains the leading policy, economic and networking event in the SCDI calendar and took place on March 16th and 17th March. Supported by our strategic partners, economic growth and wealth creation were central themes to the Forum, with topics ranging from industry

& skills 4.0 to inclusive growth and natural capital.

SCDI members had the opportunity to engage with Scottish and UK Government representatives both at Forum 2017 and throughout the year, via the Political Challenge Series, SCDI Influencer Series and roundtable events, supported by our partners.

Government representatives included Keith Brown MSP, Cabinet Secretary for Economy, Jobs & Fair Work, The Scottish Government; The Rt Hon David Mundell, Secretary of State for Scotland, UK Government; Mark Garnier MP, Parliamentary Under Secretary of State for the

Department for International Trade, UK Government; and Derek McKay MSP, Cabinet Secretary for Finance and the Constitution, The Scottish Government.

Leading industry and political figures engaged with SCDI across a range of current issues including Brexit and digital, with the programme informed by the Blueprint focus on productivity, innovation, internationalisation and infrastructure investment.

SCDI also facilitated discussions with international representatives, including roundtables with US Embassy Officers, the Ethiopian Ambassador and Foreign and Commonwealth Office Heads of Mission.

The business engagement programme provided updates on SCDI policy plans and priorities, alongside the opportunity to network with fellow SCDI members.

North East

The 2016/17 period in the North East was characterised by a continuation of the economic downturn precipitated by the sudden decline in oil price from mid-2014 onwards. Cutbacks in investment and a drive for improved efficiency across the oil and gas sector led to job losses, downsizing and the closure of many businesses. However, the 2017 period, aided by a more stable and slowly rising oil price, led to some optimism that the worst of the downturn was over. This was reflected by an increase in the mergers and acquisitions activity across the sector



Martin Temple CBE (right), Chair of the Health & Safety Executive, delivered the 13th Annual North East Lecture, at Ardoe House.

and an increase in passenger numbers at Aberdeen International Airport, after several years of decline.

As SCDI reflects the economy, retaining members – and the scope for recruiting new members – was limited. Despite this, the level of resignations was not significantly greater than previous years and new members continued to be recruited. This was achieved by maintaining an active member visit and events programme. 22 events were organised during the 2016/17 period and attendance, both in terms of numbers and seniority of attendee, remained high.

The flagship event was SCDI's 13th Annual Lecture, at which Martin Temple

CBE, Chair, Health & Safety Executive, was guest speaker. It was attended by 240 members and guests on 19th January 2017 at Ardoe House Hotel & Spa.

Throughout the year, policy submissions were made by the North East Committee to the Scottish Government on the impact of the Business Rates increase and to Aberdeen City Council regarding proposals for a new Aberdeen Football Club stadium and training complex at Kingsford. On the latter the Regional Director gave verbal evidence to the Council's Pre-Determination Hearing in September 2017.

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Membership

Highlands & Islands

2016/17 saw tourism and food and drink flourishing across the Highlands and Islands with visitor numbers up and continued investment across whisky distillation, salmon production, and other sectors. In particular, the acquisition of the Lochaber smelter by the GFG Alliance with their growth ambitions is a real boost to the West Highlands. Access to labour and the provision of sufficient housing to meet growth are an increasing challenge for businesses in the face of an aging population but there remains strong optimism for the future.

Over 2016/17 SCDI held a host of events focused on the Inverness and Highland City Region Deal to help businesses and organisations understand the projects that were taken forward as part of that Deal. This included events in Inverness with Professor Andrew Morris the Chief Scientist at the Scottish Government Health Directorate, with Keith Brown MSP the Cabinet Secretary for Economy, Jobs and Fair Work, as well as a dinner in Fort William with Paul Wheelhouse, Minister for Business, Innovation & Energy. We also held a dinner with Paul Mason, the Director of Emerging & Enabling Technologies at Innovate UK, in Elgin, and at Inverness Airport in support of new KLM services.

In September we held the eighteenth SCDI Highlands and Islands Annual Dinner and Business Excellence



Chairman's Award: Jane Cumming (Chair SCDI H&I), Fraser Grieve, presenting Freda Newton with her award.

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SCDI has continued to be actively engaged as a member of the Inverness and Highland City Region Deal Programme Board and also sit on the Moray Growth Deal Programme Board.

Awards with Deputy First Minister John Swinney MSP as the guest speaker and comedian Marcus Brigstocke as the awards host. SCDI has continued to be actively engaged as a member of the Inverness and Highland City Region Deal Programme Board and also sit on the Moray Growth Deal Programme Board. SCDI has also been supportive

of members on issues such as the Enterprise and Skills Review and providing support following the acquisition of the Rio Tinto smelter in Fort William by the GFG Alliance.

Young Engineers and Science Clubs

SCDI's Young Engineers and Science Clubs (YESC) Scotland programme has played a key role in inspiring young people towards STEM (Science, Technology, Engineering, Maths) careers for almost 30 years.

The YESC programme exists to support Scotland's future economy by informing and inspiring young people about STEM subjects and careers, through a range of innovative projects and exciting events.

2016/17 saw a further 135 schools across Scotland join our network bringing the total number of schools registered with YESC to over 1,500; representing 90% of Scottish secondary schools and 61% Scottish primary schools across all 32 local authority areas, with an estimated membership of over 35,000 boys and girls.

Our annual Celebration of STEM took place in June at Glasgow Science Centre, with hundreds of young engineers & scientists showcasing their work to industry experts and taking part in a series of STEM challenges including the national final for this year's annual STEM challenge: Construct a Crane, supported by EnerMech.

The Club of the Year Awards went to Mearns Primary, East Renfrewshire, and Monifieth High School, Angus.

Regional Celebrations of STEM also took place in Dundee, Aberdeen, Inverness and Ayrshire throughout March.

Programme highlights 2016-17

- Provided 720 grants and STEM resources to schools including Raspberry Pis to support development of digital skills.
- By popular demand we developed and launched a new first level project, Little Lighthouse, to engage P2-4 pupils in almost 100 schools to develop STEM knowledge and skills.
- 226 schools took part in Construct a Crane challenge with EnerMech.
- 13 primary schools in Orkney took part in a solar panel investigation and presented findings as part of Orkney International Science Festival in September 2017.
- 59 secondary schools took part in the 3rd year of the Tomorrow's Engineers Energy Quest programme.

Lead Partners of Young Engineers and Science Clubs Scotland during 2016/17



Principal Partners of Young Engineers and Science Clubs Scotland during 2016/17



TOTAL
COMMITTED TO BETTER ENERGY

wood.

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SCDI's YESC resources and support allow our STEM Club to run successfully all year. The challenges set are what the children look forward to. Invaluable experiences.

Simon Corrie, Andover Primary

Committees

Memberships at AGM 2018

President

Dame Susan Rice DBE

Board Directors

Chair: **Brendan Dick**, BT Scotland

Deputy Chair: **Ian Wall**

Karen Betts, The Scotch Whisky Association

Stephen Boyle, RBS

David Cameron, EDF Energy

Stewart Carruth, Stirling Council

Jane Cumming (Chair, Highlands & Islands Committee), Platform PR

Lord Andrew Dunlop

James Fowlie, COSLA

Trevor Garlick OBE (Chair, North East Committee)

Edel Harris, Cornerstone

Carolyn Jameson, Skyscanner

Dame Barbara Kelly

Jim McColl, Clyde Blowers Capital

Willie Maltman, Future Proof Learning

Steve Montgomery, FirstGroup

Ray Riddoch, Nexen Petroleum UK

Ian Ritchie CBE

Malcolm Robertson (Chair, London

Committee), Charlotte Street Partners

Malcolm Roughead OBE, VisitScotland

Grahame Smith, STUC

Policy Committee

Chair: **Brendan Dick**, BT Scotland

Martin Armstrong, Wheatley Group

George Baxter, SSE

Kersti Berge, Ofgem

Karen Betts, The Scotch Whisky Association

Stephen Boyle, RBS

Paul Brewer, PwC

Jackie Brock, Children in Scotland

Carroll Buxton, Highlands & Islands

Enterprise

Catherine Cairns, Scottish Enterprise

David Cameron, EDF Energy

Stewart Carruth, Stirling Council

Jane Cumming (Chair, Highlands & Islands Committee), Platform PR

Caroline Donaldson, Kynesis

Prof Pete Downes, Universities Scotland

Bill Duguid, Ryden LLP

Lord Andrew Dunlop

Peter Farrer, Scottish Water

Pete Flockhart, Bank of Scotland

James Fowlie, COSLA

Trevor Garlick OBE (Chair, North East Committee)

Cllr Stephen Hagan, COSLA

Edel Harris, Cornerstone

Carolyn Jameson, Skyscanner

Dame Barbara Kelly

Paul Little, City of Glasgow College

David Lonsdale, Scottish Retail Consortium

Calum MacDonald, SEPA

Jim McColl, Clyde Blowers Capital

Willie Maltman, Future Proof Learning

Alexandra Miller, The National Library of Scotland

Steve Montgomery, FirstGroup

Maggie Morrison, CGI IT UK Ltd

Tom Murray, Mercy Corps Europe

Duncan Osler, MacRoberts LLP

Grahame Paterson, City Building

Julie Pirone, Royal Mail

Ronnie Quinn, The Crown Estate

David Reid, Jacobs

Ray Riddoch, Nexen Petroleum UK

Ian Ritchie CBE

Malcolm Robertson (Chair, London Committee), Charlotte Street Partners

David Rodger, Shell U.K. Limited

Alastair Ross, ABI

Ken Ross OBE, Ross Development and Renewables

Malcolm Roughead OBE, VisitScotland

Alastair Sim, Unviersties Scotland

Douglas Smith, CBRE Ltd

Grahame Smith, STUC

Ian Smith, Diageo Scotland Limited

Tim Smith, BP p.l.c

Shona Struthers, Colleges Scotland

Sara Thiam, Institution of Civil Engineers

Scott Walker, NFU Scotland

Ian Wall (Deputy Chair, SCDI)

Andy Willox OBE, FSB Scotland

Damien Yeates, Skills Development Scotland

Observers

Joe Brown, The Scottish Government

Tom Cartlidge, Scotland Office

William Dowson, Bank of England

Mary McAllan, The Scottish Government

Lucy Smith, Cabinet Office

International Business

Chair: vacant

Martin Bell, The Scotch Whisky Association

Su Cox, The Scottish Salmon Company

Afzal Khushi CBE, Trespass

Marcus Kneen, IndigoVision Plc

Scott Landsburgh, Scottish Salmon Producers' Organisation

Jaap Matthijsen, A G Barr Plc

William McIntosh, Brodies LLP

Bertrand Pons, SUEZ Purification & Disinfection Systems Ltd

Stephen Telford, High Voltage Instruments

Ian Walker, Johnson & Johnson

Highlands & Islands

Chair: **Jane Cumming**, Platform PR

Stuart Black, Highland Council

Steve Bracken, Marine Harvest (Scotland) Ltd

Carroll Buxton, Highlands and Islands Enterprise

Robbie Drummond, David MacBrayne Limited

Chris Gaffney, Johnstons of Elgin

Rhona Gunn, Moray Council

Bill Hamilton, KLM Partnership

Alastair Kennedy, Global Energy Group

Stephen Knight, Mott MacDonald

Fiona Larg MBE, University of the Highlands and Islands

Inglis Lyon, Highlands and Islands Airports

Ewen Mackintosh, Gordon and MacPhail

Kevin McCreath, Scottish Water

Donald McLachlan, Morrison Construction

Ranald Robertson, HITRANS

John Scott, LifeScan Scotland

Marianne Townsley, SSE

David Whiteford OBE, North Highland Initiative

North East

Chair: **Trevor Garlick OBE**

Gary Atkinson, Carmelite Hotels

Carol Benzie, Aberdeen International Airport

Iain Brothie, Total E&P UK Limited

Kevin Burnett, Mott MacDonald Ltd

Stephen Christie, BP

Roy Choudhury, WorleyParsons

Mark Dames, BT Scotland

Prof Sir Ian Diamond, University of Aberdeen

Stuart Garrett, Serco Northlink Ferries

John Irvine, Bancon Group

David Kemp, Wood Group

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Prof Ferdinand von Prondzynski, Robert Gordon University

Kevin D Reynard, PwC

Jo Robinson, VisitScotland

Jim Savege, Aberdeenshire Council

Angela Scott, Aberdeen City Council

Duncan Skinner, Glencraft (Aberdeen) Ltd

Donald Smith, LiceComb Engineering

Peter Thain, NORR

John Wallace, Peterhead Port Authority

London

Chair: **Malcolm Robertson**, Charlotte Street Partners

Dr Sandy Dobbie

Craig Forrest, Arup

Prof Pamela Gillies CBE, Glasgow Caledonian University

Barry Glew, Siemens

Dermot Grimson, The Crown Estate

Bobby Hain, STV Group

Phil Henderson, ScottishPower

Christopher Parker, London & Scottish International

SCDI Fellows

Graeme C Archibald

Robert Armour OBE

Prof Christopher Blake CBE

Craig Campbell

Ian Christie

Bill Cockburn CBE TD

Richard Cole-Hamilton CBE

Jane Cumming

Donal Dowds

Bill Drummond

Sir James Duncan

Trevor Garlick OBE

Francis Hamilton

Rod Johnstone

Afzal Khushi CBE

Peter Lederer CBE

Sir William Lithgow Bt

Shonaig Macpherson CBE FRSE

The Hon Sir William McAlpine Bt

Iain McLaren

Jack McLaren

George Menzies

Dr James Milne CBE

Joe Moore

Hamish R Morrison OBE

William C C Morrison CBE

Brian Nicholls

Colin Parker

David Paton OBE

Dr Ian M H Preston CBE

Esther Robertson

Ronnie Scott Brown

Duncan R Skinner

James Smith

Matt Smith OBE

Prof William Stevely CBE

Donald Turner

Michael Urquhart

Alan Wilson OBE

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Board and membership, we take a long-view
on Scotland's economy. Our policy work,
communications and events convene the private,
public and not for profit sectors – as well as
individuals – to inform and inspire action. Using
our ability to focus and amplify, we influence
change across sectors and governments, in
Scotland and the UK, aspiring for sustainable
economic growth and flourishing communities
everywhere in Scotland.*
