



Operating Plan

2022/23



Contents

Foreword	3
Who We Are	4
We Said, We Did	6
Economic Context	8
Our Action Plan	10
Our Organisation	11
Arriving at Our Priorities for 2022/23	12
• Supporting Economic Recovery and Resilience	13
• Developing Our Offer	14
• Driving Change and Influencing Others in Action	16
• Investment Priorities	18
Measuring Success	19

ANNEXES	20
Appendix A - Our Board	21
Appendix B - Our Organisation	25
Appendix C - Our Operating Budget for 2022/23	26
Appendix D - Summary of Grant Awards 2021-2022	27



Foreword

We are delighted to introduce you to South of Scotland Enterprise's third operating plan, which sets out our priorities for the year ahead.

To help us to provide the most relevant support for our region, one of our key tasks has been to listen. The views of hundreds of people in the south have informed our plans, including our first-ever Action Plan, set to be launched in 2023. This five-year plan will set out our longer-term aims and will allow us to focus on the areas where we can really make a difference.

The conversations we have had are essential but also a highly enjoyable part of our role. We intend to continue getting out to meet and listen to as many businesses, social enterprises, communities and people across the region.

As we navigate these challenging economic conditions, we remain committed to ensuring our region is heard, represented and opportunities are developed on a local, national and international level.

We have also seen many businesses and communities innovate in response to current challenges, and we want to support them as much as possible to continue being at the forefront of change.

Our Operating Plan is closely aligned to the South of Scotland Regional Economic Strategy (RES), which is targeting a fairer, greener and flourishing South for everyone.

We are also alive to the need to ensure that in delivering for the South, all that we do supports the Scottish Government's National Strategy for Economic Transformation (NSET)

- which aims to maximise the opportunities of the next decade to achieve Scotland's vision of a wellbeing economy.

To do this, we want to drive change in some key areas. Achieving Net Zero and enhancing our Natural Capital assets are priorities for us all, and provide massive opportunities for our region.

We are fully committed to supporting and encouraging Fair Work, to give everyone an effective voice, opportunity, security, fulfilment and respect in their workplace.

Innovation in both our traditional and emerging industries also represents a huge opportunity for the South of Scotland, and we want to play a key role in driving this innovation forward.

We now have over 140 incredible staff with a collective vision to support the overall wellbeing of the South of Scotland's communities, economy and environment. We are stronger and better placed than ever to deliver for the South of Scotland and our message remains simple - if you need support then please get in touch.

We look forward to the year ahead and truly believe that 'Success Starts Here' in the South of Scotland.



A handwritten signature in black ink, appearing to read 'Russel Griggs'.

Professor Russel Griggs OBE
Chair, South of Scotland Enterprise



A handwritten signature in black ink, appearing to read 'Jane Morrison-Ross'.

Jane Morrison-Ross
Chief Executive, South of Scotland Enterprise

Who We Are

As South of Scotland Enterprise, SOSE for short, we have been set up to bring a fresh approach to economic and community development in the South of Scotland.

We were established through the South of Scotland Enterprise Act 2019, assuming our powers and launching on 1 April 2020. We have been established in direct response to the unique economic opportunities and challenges facing the South of Scotland, and we are here to lead the delivery of a fresh and locally focused approach required to succeed in responding.

Our Aims

Our twin **AIMS**, as set out in legislation, are to further the sustainable economic and social development of the South of Scotland, and to improve the amenity and environment of the South of Scotland.

Our Vision

Our **VISION** is to drive inclusive growth, increase competitiveness and tackle inequality within the region. We want to establish the South of Scotland as a centre of opportunity, innovation and growth.

Our Mission

Our **MISSION** is to work together with people across the South of Scotland to grow its economy in a just and sustainable manner. We will provide investment, expertise and mentoring to people and businesses and by doing so, we will inspire the region to think bigger and unlock the great potential of the South.

Our Board

Our **BOARD** has a broad range of knowledge and experience and is chaired by Professor Russel Griggs OBE, with the organisation being led by our Chief Executive, Jane Morrison-Ross.

You can meet our Board at [Appendix A](#)

*“We are... **FOR** the South, **BY** the South and **IN** the South.”*

Our Values

Our VALUES are at the heart of all we do. They have been shaped by a process of collaboration and are grounded in an understanding of the South of Scotland and its needs. We will be...

...Inclusive

- Collaborative, long term.
- Building trust, bottom up not top down.
- Supporting diverse thinking from diverse communities and business.

...Responsible

- We do what's right for communities and the planet.
- We are honest, transparent and straight-talking.
- We champion the South; its people, communities and businesses.

...Bold

- Open-minded, creative, lateral.
- Optimistic, pioneering and ambitious.
- Aiming high, providing hope and encouragement.

...Striving

- We take pride in all that we do.
- We never give up, we fight for what's right.
- We challenge ourselves to always be better.

We Said, We Did...

Our Operating Plan priorities are defined by our national and regional context, as well as the underpinning South of Scotland Enterprise Act 2019. Before setting out our priorities for the year ahead we have taken stock of last years plans and priorities. Looking back to 2021-22 we set out to:

1. Support Economic Recovery
2. Develop Our Offer
3. Drive Change and Influence Others

In responding to these, our headline achievements include:

Support Economic Recovery



Assisted over **700** businesses, communities and projects through our one-to-one engagement, advice and support.



Awarded just over **£13.5m** from our own grant funds, supporting **191** businesses and community projects, safeguarding **2,367** jobs and creating **1,164** more.



Distributed **£2.1m** of loan funding, supporting **6** business and community projects



Helped distribute **£0.4m** of Scottish Government COVID Recovery funding, supporting **172** businesses and projects

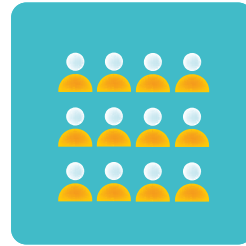
Develop Our Offer



Enhancing and furthering our reach – growing our social media and digital presence and introducing a new e-newsletter



Developing and adapting our organisational structure, **positioning ourselves to deliver newly defined regional and national ambitions**



Growing our headcount to 145 to enhance our capacity and capabilities



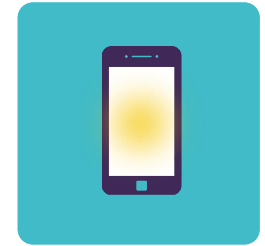
Establishing a **new Net Zero Directorate**, demonstrating our commitment to support an accelerated Just Transition to Net Zero in the South of Scotland



Strengthened our **focus on Innovation & Entrepreneurship**, establishing clear leads and new enterprise coaches including a dedicated focus on supporting women and young people



Creating and launching a **new SOSE Client Hub**, helping to make our **client's journey easier, faster and more effective**



Made it easier to access us and our support, having **launched an interactive mobile App**, with around 250 people signed up and scope to grow this significantly across the year ahead

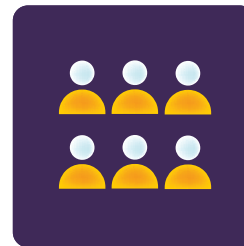
Drive Change and Influence Others



Supporting the development and launch of the **South of Scotland's first ever Regional Economic Strategy** – setting out a vision for a Fairer, Greener and Flourishing region by 2031



Visiting many of the region's towns and villages through our **SOSE Engagement Tour** – hearing first hand from **500** people – including seldom heard voices about what matters most to them



Establishing a **South of Scotland Business Panel** – with a growing number of over 470 of the regions businesses already signed up



Achieving a **Carbon Literate Organisation Bronze Award** having rolled out climate and carbon literacy training to nearly all our Board and Staff Members

Economic Context

National Strategy for Economic Transformation

The [National Strategy for Economic Transformation \(NSET\)](#) was launched by the Scottish Government in 2022 and sets out a long-term collective vision for Scotland's economy by 2032. It heralds a new approach towards the creation of a wellbeing economy. It seeks to drive a green economic recovery to meet our climate and nature targets while ensuring the benefits are maximised as part of a Just Transition for Scotland and all its regions.

The strategy focuses on five policy programmes which have the greatest potential to transform the economy. They are designed to:

- Stimulate entrepreneurship
- Open new markets
- Increase productivity
- Develop the skills Scotland needs for the decade ahead
- Ensure fairer and more equal economic opportunities.

These programmes are underpinned by a strong culture of delivery, which aims to transform the way support is delivered to people and businesses across Scotland.



Figure 1: NSET Vision, Ambition and Programmes of Action for Scotland's Economy by 2032

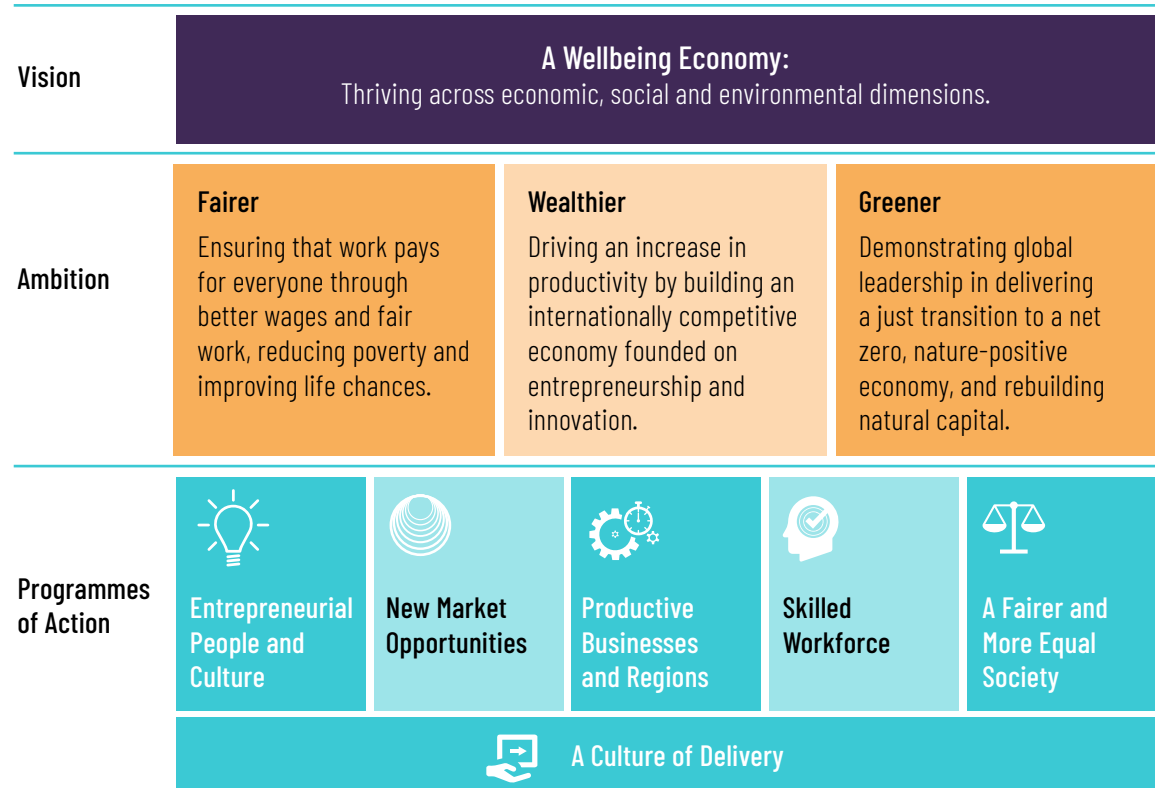


Figure 2: Vision, Themes and Priorities of the South of Scotland Regional Economic Strategy

Regional Economic Strategy

The [South of Scotland Regional Economic Partnership \(REP\)](#) met for the first time in September 2020, and comprises leading members of Scottish Borders Council, Dumfries and Galloway Council, South of Scotland Enterprise, together with appointed members from business, communities, social enterprise, registered social landlords, and representatives from colleges, universities and public bodies including the Scottish Funding Council, Skills Development Scotland, and VisitScotland.

The [Regional Economic Strategy](#) was developed by the REP and launched in 2021, setting out the economic priorities for the region until 2031. It has been created following engagement with over 1,400 individuals, businesses, communities and organisations across the region.

The strategy contains six themes, each containing four priority areas for action. The themes are all interlinked and of equal importance in realising the vision at the strategy's heart.

“ We will be a region of opportunity and innovation – where natural capital drives green growth, ambition and quality of life rivals the best in the UK, communities are empowered and cultural identity is cherished, enabling those already here to thrive and attracting a new generation to live, work, visit, learn and invest in the South of Scotland. **”**



Our Action Plan

Legislation requires us to publish an Action Plan setting out in detail how we intend to achieve our twin aims of “furthering the sustainable economic and social development of the south of Scotland” and “improving the amenity and environment of the south of Scotland”.

Given the immediacy of the need to support businesses through the pandemic, the decision was made to defer production of our first Action Plan into 2022. This also allowed us to embrace the opportunity to align with the National Strategy for Economic Transformation (NSET) and the Regional Economic Strategy (RES) and align our strategic planning cycle with other enterprise agencies.

Looking up to five years ahead, our Action Plan will be critically important, setting out our strategic direction and our key priorities. It will:

- tell people who we are and what we are here to do;
- communicate our vision and long-term priorities – the difference we intend to make;
- provide a framework to guide our short-term focus and investment decisions;
- demonstrate how what we intend to do delivers both for the South of Scotland and Scotland as a whole;
- set out our approach to making it happen, including key partners we will look to work with; and
- make clear how we will measure our impacts and judge our performance – enabling those who we are here to serve hold us to account.

Before developing our Action Plan, we consulted with those living, working and operating across the South of Scotland. This is important given that listening and acting on what we hear goes to the heart of what we have been set up to do. We want to focus our efforts and resources on addressing those issues that matter most to those in the South of Scotland. To help inform what will be our first Action Plan, we undertook a significant effort to meet and hear from people across the South of Scotland during the latter part of 2021 and early part of 2022. We held 25 events, 23 in person in towns and villages across the region and 2 online.



Figure 3: Key Influences on Our Action Plan

Our Organisation

We are still a young organisation, and we continue to evolve as we grow and develop. Having increased our headcount to over 140 over the past year – we have significantly expanded and strengthened our existing teams, capabilities and ultimately our ability to deliver for the South of the Scotland.

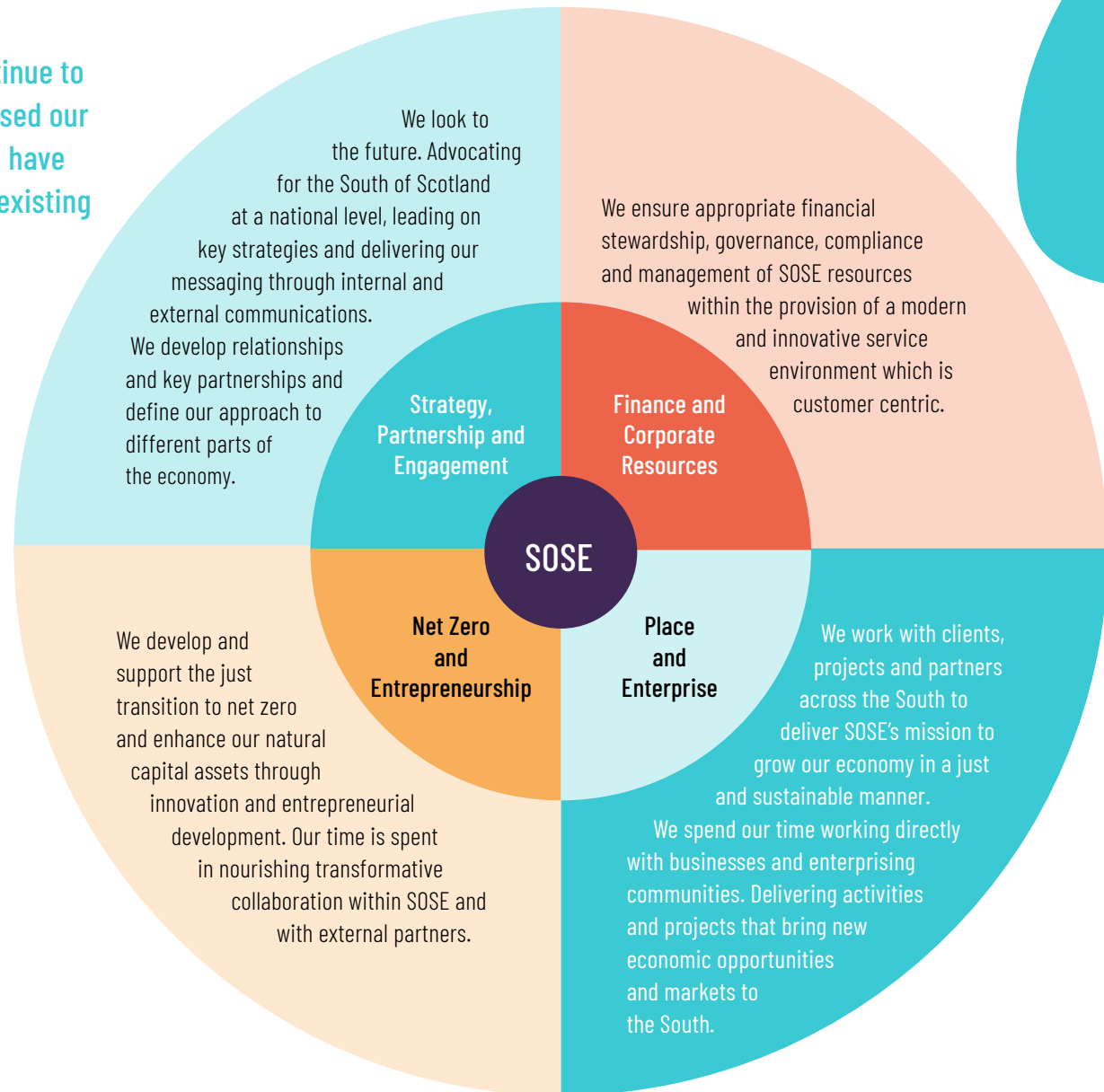
Our internal structure reflects the wider economic context and particularly our relentless focus on helping to realise the vision for a fairer, greener and flourishing South of Scotland by 2031 – making sure we contribute to national ambitions for a Wellbeing Economy as we do so.

Being a new organisation has enabled us to pioneer new ways of working. We have built high performing teams around a ‘dynamic cluster’ approach to working together – enabling us to put the right expertise in the right place at the right time.

We are championing a Fair Work approach and are proud to have created an inclusive working environment where every member of our team can feel valued and contribute to our organisational culture and outcomes.

You can find out more about our organisation – and meet our Directorate leads – at [Appendix B](#).

Figure 4: Overview of Our Directorates



Arriving at Our Priorities for 2022/23

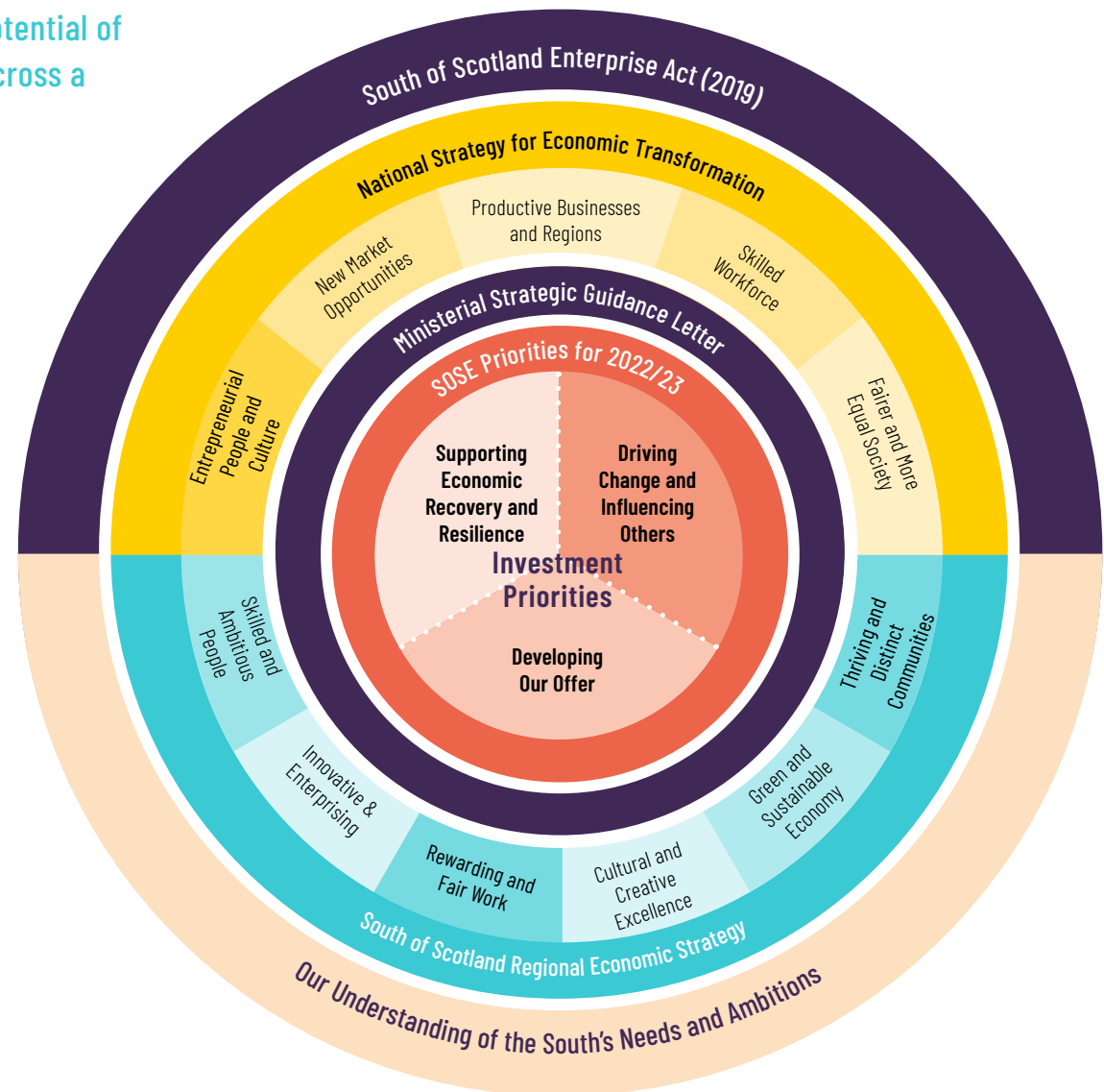
All that we do continues to be underpinned by the South of Scotland Enterprise Act 2019, that recognises to realise the full potential of the South of Scotland, our actions need to be directed across a wide range of activities.

As a Non Departmental Public Body (NDPB), we receive an annual strategic guidance letter from Scottish Government – the purpose of which is to make clear what is expected of us in terms of our focus.

Our guidance letter for 2022/23 highlights a need to focus our effort and resources on delivering the ambitions and actions of the National Strategy for Economic Transformation (NSET), and for us to tailor what we do in response to evidenced regional strengths and opportunities. Accordingly, NSET and the South of Scotland Regional Economic Strategy provide the wider national and regional economic context for us to develop our own programme of work.

In refining our focus, we have had regard to a real-time understanding of our region's needs and ambitions – drawing on feedback from our Board, staff and those who live, work and operate across the South who we engage with.

Figure 5: Factors Influencing Our Priorities



Supporting Economic Recovery and Resilience

Global economic conditions continue to impact on and present challenges for many businesses and organisations across the South of Scotland. Efforts to recover and regain momentum lost to COVID has, for many, been significantly hampered by labour and supply chain issues as well as rising inflation and particularly energy costs.

In the face of arguably the most challenging conditions many businesses and organisations have had to contend with, there remains a critical ongoing need across 2022/23 to help those enterprises, who have the potential to thrive in the future, to survive.

What we are focussed on:	What we are doing:
<ul style="list-style-type: none">• Enhancing our understanding of the scale and nature of economic shocks affecting businesses and organisations within the South of Scotland.• Working collaboratively with national and local partners to identify and promote actions and opportunities to help mitigate known impacts.• Delivering proactive, personalised support with a strong focus on business improvement to help realise efficiencies and/or increase productivity as a means of overcoming challenges.• Sustaining as many viable jobs as possible, recognising the real risk of significant redundancies across a number of sectors within our economy.• Championing the needs of the South of Scotland by contributing intelligence and influencing Government thinking and actions.• Supporting communities by encouraging and supporting them to develop sustainable projects that create jobs and aid community wellbeing.• Investing in opportunities to increase resilience through accelerating a Just Transition to Net Zero.• Creating opportunities for Responsible Investment in Natural Capital.	<ul style="list-style-type: none">• Adopting a Team South of Scotland approach – working seamlessly with partners to pool intelligence on known or potential impacts and to coordinate support efforts.• Engaging with as many businesses, communities and other initiatives seeking support, assisting or signposting where we can.• Investing in a programme of expert help focussed on attracting and retaining talent to support those businesses and organisations experiencing difficulties in recruiting.• Sharing learning and best practice on adaptation, diversification and innovation as a means of mitigating economic impacts.• Regularly sharing intelligence on potential redundancies and supporting appropriate response action including business crisis support and PACE activity.• Partnering with Fuel Change to set up a range of sustainability-focused challenges in collaboration with local businesses and organisations, to encourage the development of new, innovative and Net Zero solutions.• Promoting the benefits of investing now to accelerate a Just Transition to Net Zero• Collaborating with partners to develop a pipeline of Investment Ready Nature Based Solutions

Developing Our Offer

Growing our head count and our capacity to deliver for the South of Scotland has enabled us to continue to develop our offer through initiating new services, support and funding focused on addressing the specific needs and issues of our region in a way that will also contribute to national ambitions. We will focus on building our expertise and increasing awareness across the region of what we offer, continuing to collaborate on key regional initiatives.

What we are focussed on:	What we are doing:
<p>Developing and expanding our service offer for businesses, social enterprises, communities and initiatives / projects</p>	<ul style="list-style-type: none"> • Continuing to offer individual support, tailored to clients' needs, issues and opportunities • Developing our range of support, services and funding for businesses, social enterprises, communities and initiatives / projects • Delivering Business Gateway Scottish Borders working closely with Business Gateway Dumfries and Galloway to ensure a strong and consistent support offering • Ensuring our service offer complements other locally or nationally available support or funding • Participating, supporting and building on the work of the Business Support Partnership • Developing our sectoral experience, including creative industries, tourism and manufacturing • Refreshing our website to ensure that our offer is clearer and our people more accessible
<p>Providing strategic leadership and support to accelerate a Just Transition to Net Zero (JTNZ)</p>	<ul style="list-style-type: none"> • Supporting all in our region to adopt new practices that support and accelerate a Just Transition to Net Zero (JTNZ) • Supporting the decarbonisation of regional Supply Chains, as well as embedding adaptation & business resilience planning • Working collaboratively to help bring forward new market opportunities arising from the JTNZ for example Hydrogen; and building capacity in the construction and energy supply chains • Developing programmes that look to embed net zero at the heart of our region's enterprises be that through Fuel Change or the Environmental Placement Programme • Deliver a Green Jobs fund to invest £800,000 capital grant funding to create new businesses and jobs in the green economy
<p>Understanding the functions of our natural capital assets to deliver a Wellbeing Economy, addressing biodiversity loss and climate change impacts</p>	<ul style="list-style-type: none"> • Driving the development of the Regional Land Use Partnership pilot through an extensive programme of public engagement • Collaborating and co-designing the Borderlands Natural Capital Programme, leading on the development of the Data and Investment projects • Supporting and promoting the activities of innovative Natural Capital projects such as the Galloway and Southern Ayrshire UNESCO Biosphere and Langholm Initiative

What we are focussed on:	What we are doing:
Supporting communities across the region to grow and thrive for the realisation of a fairer and more equal society	<ul style="list-style-type: none"> • Offering support to community organisations that is tailored to their individual needs, issues and opportunities • Delivering targeted support to priority communities / places as identified by local authorities to develop leadership and capacity to stimulate new local economic and community opportunities • Working with partners to deliver activities to nurture and grow entrepreneurial talent in our communities and stimulate enterprising activity • Contributing to the ongoing development of place planning across the South of Scotland in conjunction with Local Authorities and other partners • Supporting partners to shape significant regional funding programmes such as the Levelling Up Fund and UK Shared Prosperity Fund to empower and improve opportunities for our communities
Creating an entrepreneurial culture within the South, which supports people to start new enterprises and existing enterprises to respond to new and emerging market opportunities	<ul style="list-style-type: none"> • Developing and implementing an Entrepreneurial Roadmap to guide support • Working in partnership with Converge to find and help build entrepreneurial talent • Co-developing and delivering ambitious approaches to supporting Women's and Youth-Led enterprise across the South of Scotland, working with partners including Young Enterprise Scotland • Sponsoring and taking forward South of Scotland CivTech challenges, enabling solutions to be co-developed with business start-ups • Collaborating with Interface to inspire greater numbers of businesses and communities in the south of Scotland to work with and benefit from the knowledge and expertise of Scotland's Universities and Colleges
Attracting inward investment and encouraging investment from within the South of Scotland, seizing new market opportunities and creating new jobs with a strong focus on creating a just and green economy	<ul style="list-style-type: none"> • Providing tailored support to businesses to seize immediate new market opportunities • Developing a regional inward investment strategy, founded upon an enhanced understanding and baseline • Developing and rolling out international branding to raise the profile of the South • Launching a new website based regional inward investment portal • Identifying land and buildings across the region that could be developed for Inward Investment and growing local businesses - highlighting where gaps exist to inform future capital projects • Developing and strengthening relationships with key partners including Scottish Development International and Department for International Trade • Developing a Team South of Scotland approach to inward investment enquiries to ensure an approach which enables a collaborative and efficient response.
Collaborating with partners, organisations and industry bodies to deliver key regional focussed programmes, projects and opportunities in pursuit of a productive region	<ul style="list-style-type: none"> • Supporting implementation of the Borderlands Inclusive Growth and the Edinburgh and South East Scotland City Region Deals - continuing to work with UK and Scottish Governments to do so and seeking to maximise the benefits for the South of Scotland • Taking an active lead in delivering key elements of the Borderlands inclusive Growth Deal including the Mountain Bike Innovation centre and Natural Capital Innovation Zone • Working collaboratively to drive forward key actions within the RES Delivery Plan including the delivery of a South of Scotland Cycling Strategy • Strengthening links with Scotland's Innovation centres, working collaboratively to identify opportunities to drive increased innovation in the region • Identifying opportunities to connect our business clients to the Advanced Innovative Manufacturing Service to maximise potential for each business • Delivering the outcomes and goals outlined in our SOSE Digital Strategy • Establishing a strategic partnership with Zero Waste Scotland to work together in accelerating the region's circular economy ambitions • Developing our understanding, engagement and action in key thematic areas for the South of Scotland • Leading the collaborative development of Community Wealth Building approaches in the region

Driving Change and Influencing Others in Action

Aided by an enhanced and growing understating of our region – coupled with the clarity of ambition that the Regional Economic Strategy (RES) and National Strategy for Economic Transformation (NSET) provide – we are stepping up to lead change and being proactive in influencing others to accelerate the realisation of a fair, green and flourishing South of Scotland, working collaboratively with a wide range of partner organisations to do so.

What we are focussed on:	What we are doing:
Continuing to develop our strategic thinking, vision and priorities.	<ul style="list-style-type: none"> Developing our strategic Action Plan ensuring alignment with the South of Scotland Regional Economic Strategy (RES) and National Strategy for Economic Transformation (NSET). Agreeing our performance framework to measure and assess our progress.
Providing leadership to develop a shared agreement about the opportunities, challenges and priorities for growing a fairer, greener and flourishing South of Scotland.	<ul style="list-style-type: none"> Actively contributing to the Convention of the South of Scotland (COSS) shaping the agenda and discussion, as well as the Regional Economic Partnership (REP) – hosting the secretariat and working with partner organisations to reach agreement on key issues and priorities.
Becoming a Net Zero organisation and acting as a catalyst to collaboratively developing a regional approach to the Just Transition to Net Zero (JTNZ).	<ul style="list-style-type: none"> Co-developing a South of Scotland Routemap to Net Zero, including identifying which sectors offer the greatest economic opportunity. Co-developing an Energy Just Transition Plan for the South of Scotland, including the development of regional hydrogen and offshore wind projects.
Championing and taking forward Fair Work.	<ul style="list-style-type: none"> Working with employers and trade unions in key (low pay and precarious work) sectors to co-deliver sectoral Fair Work agreements. Providing advice, tools and resources to support clients to take action to achieve the Fair Work First criteria – as well as monitoring their actions.
Promoting Community Wealth Building (CWB) principles to create and retain wealth, economic & social benefit in the South.	<ul style="list-style-type: none"> Working with CLES and others to deliver a CWB pilot study and engaging with local and regional partners to implement its recommendations. Leading by example in delivering fair and sustainable procurement, including working collaboratively to open up opportunities for more locally based SMEs.

What we are focussed on:	What we are doing:
<p>Understanding the value of the region's Natural Capital and establishing a baseline.</p>	<ul style="list-style-type: none"> • Working collaboratively to drive forward the <u>Regional Land Use Pilot</u> in the South of Scotland, and delivery of a Regional Land Use Framework • Working with partners to develop metrics for <u>Responsible Investment in Natural Capital</u> that can be applied to projects across the South of Scotland • Developing a GIS platform to assess the quality and quantity of our Natural Capital assets, supported by robust decision-making mechanisms • Collaboratively developing technology to help land managers and communities make informed land-use decisions, enhance biodiversity and increase carbon sequestration
<p>Using our influence to:</p> <ul style="list-style-type: none"> • Shape national and local policies for the benefit of the region. • Ensure the South of Scotland gets a fair share of investment and resources from all sources. • Raise the profile, credibility, ambition and aspiration, of the South. • Increase awareness of SOSE and our mission to drive change in the South of Scotland. 	<ul style="list-style-type: none"> • Participating in industry and policy forums as a voice for the South, to shape national policy, support and resources in the interests of the South and reflecting rural needs • Establishing an Economics committee and growing our business panel membership to enhance our intelligence • Responding to key consultations and policy developments, advocating for the South • Work with partners to maximise regional access to and benefit from UK regional and other funding programmes including Levelling Up and Shared Prosperity Funds • Enhancing and diversifying our methods of communication with businesses, communities and individuals – extending our reach across the South of Scotland • Ensuring a presence at key events across the region, helping to raise our profile • Showcasing successes in the region, hosting key policy lead and Ministerial visits and developing <u>case studies</u>
<p>Understanding the impact of national and regional partnerships, strategies and plans on the South of Scotland and continuing to foster a coordinated Team South of Scotland approach/response</p>	<ul style="list-style-type: none"> • Developing our relationships with key networks and partnerships to understand where SOSE can best add value and unlock opportunities
<p>Supporting delivery of the South of Scotland Tertiary Education Pathfinder – one of two national pilots – and its focus on improving access to education, skills and training and career pathways to create opportunities to retain and attract young people.</p>	<ul style="list-style-type: none"> • Supporting the work of the Education and Skills Strategic Group and the implementation of the <u>South of Scotland Regional Skills Investment Plan (RSIP)</u>

Investment Priorities

Investment Priorities – Already Committed 2022/23

We continue to focus on recovering from COVID-19 in 2022/23, and while many of the programmes we have committed to date have this as their focus, others are very much focused on longer-term developments. Our staff represent an investment in the South of Scotland economy through the help they bring to businesses and our communities.

What we have invested in	Investment and Value (£)
Committed Programmes	(£10.986m)
Client Facing Teams	Operational resources costs related to service delivery (£6.227m)
Organisation Running Costs (excluding Client Facing Teams)	Resource costs for delivery including estates and staff (£4.840m)
Collaborative Partnerships	Collaborations with other strategic public body partners to deliver essential transactional services relating to finance, HR and IT (£1.204m)

Investment Priorities – Future Programmes 2022/23

While we continue to focus on recovering from COVID-19 in 2022/23, we will also take opportunities to focus our resources on creating and investing in opportunities which act to sustain and strengthen our economy, businesses and communities for the longer-term. Our funding is arranged through a range of different funds and these will be invested flexibly to support strong and innovative ideas.

Future investments	Investment and Value	Our approach to funding. We will:
Revenue Programmes	£0.863m	<ul style="list-style-type: none"> invest in areas which will have the biggest impact be bold and innovative in our thinking develop robust business cases with a focus on the Just Transition to Net Zero, Fair Work and retaining wealth locally (Community Wealth Building). be open to a greater share of risk work with key partners to support the implementation of, and add value to, regional investment priorities such as Borderlands Inclusive Growth Deal and Edinburgh & South East Scotland City Region Deal
Capital Programmes	£10.105m	
Loan Funds	£6.000m	
Borderlands	£1.155m	

Measuring Success

At SOSE we are driven by achieving positive impact for our region and its people, communities and businesses. We are committed to tracking progress and change as a result of the services, projects and programmes we deliver and through our wider strategy and partnership working.

To enable this we have continued to develop a performance measurement framework that will:

- Represent the unique challenges and opportunities of the South
- Reflect our wider remit as a development agency that wants to achieve economic, social and environmental transformation
- At the same time, align with the Scottish Government's ambitions, for example as articulated through the NSET, and support consistency with our partner agencies.

By capturing our impact, we can:

- Report it, in our Annual Report and Accounts and to other stakeholders
- Tell the stories of change that are happening in our region
- Enable continuous improvement within SOSE, adapting and evolving our delivery to increase our impact.

Our focus for 2022/23 is to design the overall framework, develop a suite of measures and map the system and process changes that are needed to support data collection and reporting. This will allow us to commence data collection in line with the performance measurement framework in 2023/24.

The overall framework will be made up of:

- **Primary Measures**, representing SOSE's organisational priorities for impact
- **Supporting Measures** to enable us to track other aspects of our performance, outputs and investments
- **Wider Impacts**, which include regional-level indicators. We expect our direct impact to positively influence the performance of the South of Scotland as a whole, so we need to monitor change at this level
- **Evaluation capability**, so that we can conduct in-depth evaluations of specific areas of work to build the evidence base of our impact, for example in relatively untested areas of activity where we want to prove our contribution to wider areas of strategy
- **Management Information**, which focuses on internal performance and activity, rather than external, but is critical to understand if we are operating effectively as an organisation so we can deliver for the region.

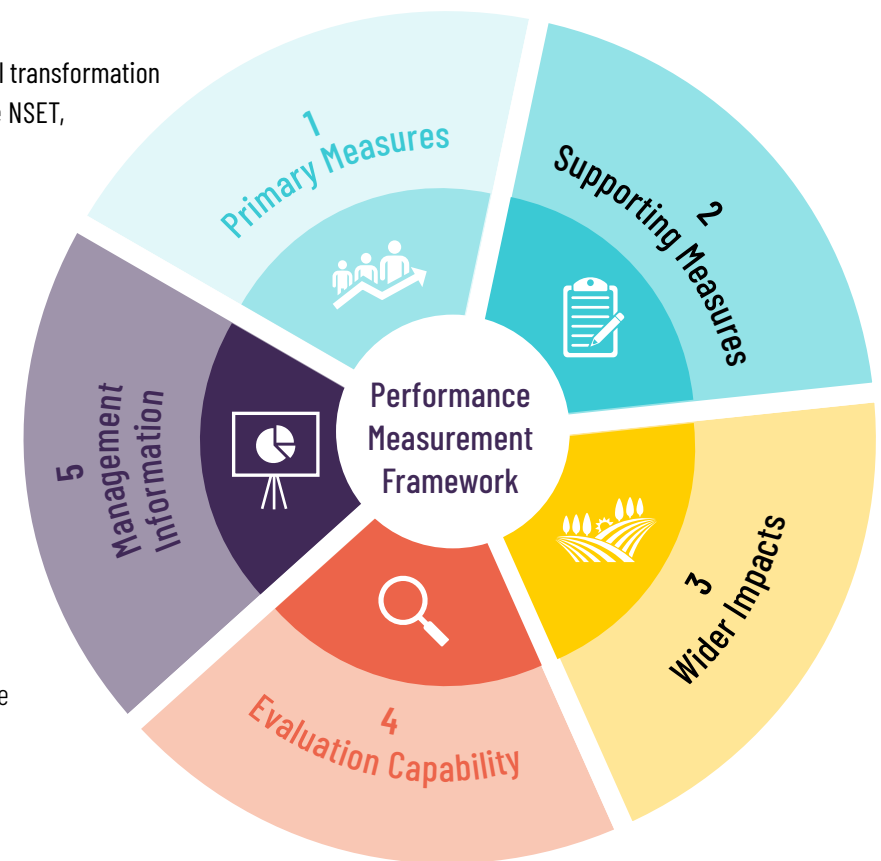


Figure 6: SOSE's Performance Measurement Framework

Annexes

Appendix A - Our Board	21
Appendix B - Our Organisation	25
Appendix C - Our Operating Budget for 2022/23	26
Appendix D - Summary of Grant Awards 2021-2022	27

Appendix A

Our Board

Direction for SOSE and all aspects of our work are overseen by our Board, currently comprised of twelve Members, chaired by Professor Russel Griggs. Taken as a whole, our Board brings together a broad range of relevant interests, skills, experience and expertise with knowledge of the whole of the South of Scotland and the issues facing those who work in the South of Scotland. It is brimming with enthusiasm, passion and a genuine commitment to drive forward our vision and deliver lasting change in the South of Scotland.

You can find out more details about [our Board](#) on our website.



Professor Russel Griggs OBE
Chair, South of Scotland Enterprise

Professor Russel Griggs OBE was also Chair of SOSEP, the body that created SOSE. Russel chairs the Scottish Government's independent Regulatory Review Group, who advise and work on better regulation in Scotland. He is a member of the Scottish Government's Aquaculture Council, Chair of Scottish Mines Restoration Trust, is a board member and senior independent director on the oversight board for the Comptroller and Auditor General for the States of Jersey, and board member of the financial services company, Lenlyn Holdings Ltd. He is honorary professor at the University of Glasgow. He was an associate professor at Boston University, and a member of the board of the Business School at Georgia Southern University. He was awarded an OBE in the Queen's Birthday Honours list in 2008 for services to Scottish industry.



Jane Morrison-Ross
Chief Executive, South of Scotland Enterprise

Jane is a highly experienced executive with over 25 years working across the public and private sector. She brings to SOSE significant expertise in strategy, transformation, local economic regeneration and creating collaborative partnerships, built from a wide ranging career including most recently as CEO of Scotland IS - Scotland's industry body for digital and technology industries. Jane Chairs a charity in Dumfries, sits on the Governance Board of Connecting Scotland and is a member of the Lay Court of Edinburgh Napier University.



Alistair Cameron
Managing Director, Scotmas Group

Alistair leads the SOSE Just Transition Committee and was previously a member of the SOSEP that led to the creation of SOSE. Alistair has built his career in the Life and Chemical sciences sector, scaling a 2 person, home based business to becoming a major local employer, exporting to 32 countries Worldwide. Alistair strongly believes that investment in innovation, advanced manufacturing technologies and people development can lead to sustainable economic growth in the region. Having led an entrepreneurial business through good times and bad, Alistair is well placed to understand the challenges and opportunities being faced by businesses across the region. Having worked in a variety of international markets, he has an excellent awareness of how others see our region, and the unique opportunities that we can exploit as a centre for opportunity and growth.



Professor Sara Carter OBE FRSE
Vice Principal and Head, College of Social Sciences, University of Glasgow

Sara leads an academic unit comprising the Adam Smith Business School, the Schools of Education, Law, Social & Political Sciences, and the School of Interdisciplinary Studies at The Crichton, Dumfries. She provides strategic leadership and support for the University of Glasgow's School of Interdisciplinary Studies in Dumfries, and is helping to shape the portfolio of teaching, research and outreach activities in the South of Scotland. As Professor of Entrepreneurship, her research focuses on the small business sector and self-employment, including focus on the agriculture, rural and food sectors; gender differences in access to business finance; and the economic wellbeing of entrepreneurial households. Sara has served on national and international bodies, including the UK Women's Enterprise Taskforce, the Council of Economic Advisers to the First Minister of Scotland, and co-chair of the British Bankers' Association Diversity & Inclusion Council. She is currently a Non-Executive Director of Women's Enterprise Scotland.



Viv Cockburn
Vice-Chair, Berwickshire Housing Association (BHA)

Vivienne is self-employed and serves on number of boards, as well as undertaking advisory work. Vivienne is a chartered accountant who has specialised in public finance, including infrastructure investment. Within the South of Scotland, she is vice-chair of Berwickshire Housing Association, and Public Interest Director with High Wood Health, the company responsible for developing and maintaining the Dumfries & Galloway Royal Infirmary. Her director roles straddle a range of sectors, including health care, low carbon energy and the just transition to Net Zero, and social housing. She was previously a director with Museums Galleries Scotland. Vivienne chairs the Audit & Risk Committee.



Helen Forsyth
SOSE Deputy Chair

Helen Forsyth is the Deputy Chair at SOSE, and holds a number of board appointments in third sector and housing bodies in Scotland. She chairs the Scottish Federation of Housing Associations, Space@the Broomhouse Hub, and The Forth Act, a community theatre company. She is on a housing association board in England and mentors up-and-coming leaders in the third sector. Helen was the Chief Executive of Berwickshire Housing Association for over 13 years, during which time she inspired staff to become number nine in the Sunday Times Best Companies 'not for profit' section. To help solve the problem of building new homes at a time when funding was in decline, she led the team who developed the groundbreaking 'Fisherman Three' Community Wind Farm, near Cockburnspath. Helen has many current links with the South of Scotland, and is passionate about promoting its economic development, and ensuring rural communities thrive.



Emma Guy
Project Manager for ESO Sports, 2023 UCI Cycling World Championships and founding Director of Scottish Community Tourism (SCOTO)

Emma is Project Manager for the 2023 UCI Cycling World Championships, which take place at Glentress in August 2023. She is also Founding Director of Scottish Community Tourism (SCOTO). Emma is a graduate of fine art turned professional downhill mountain biker. She has represented Great Britain at European and World Championship level, as well as travelling internationally, and racing on the mountain bike World Cup circuit as a sponsored rider.

Following retirement from racing, Emma set up a mountain bike cafe, bike shop, and skills school with her partner at Glentress Forest, which operated for ten years. Since then, she has been involved in various tourism projects in the South of Scotland, including Scottish Community Tourism, which represents community-led tourism enterprises.



Kirsten Hannay
Managing Partner of Kirkdale Estate, Solway Firth

Kirsten has over ten years' experience in global publishing firms in London, where she ran the global print marketing arm for The Economist Intelligence Unit, a division of the Economist Group. She subsequently established and ran a property management firm in Edinburgh.

For the last 15 years, Kirsten has worked as managing partner for Kirkdale Estate on the Solway Firth. Kirsten's role includes responsibilities for land management, farming, rural diversification, forestry, native woodland creation, and long and short-term property management and has significant expertise in these areas.

She has set up and runs a holiday let business, worked on native woodland planting, and created a lodge park on the estate. She lives and works in Dumfries and Galloway, and is very attached to the south of Scotland, and keen to see it flourish.



Duncan McConchie
Managing Director, Laggan

Duncan is managing director of Laggan, a rural destination of excellence with tourism, hospitality and sustainability at its core. He also serves as chair of the Scottish Wedding Industry Alliance. Duncan and his wife Vicki have transformed the family farm over the last six years, with the creation of on-site accommodation, GG's Yard wedding and conference venue, and Gather, their hillside kitchen-bistro. Their aim is to create new opportunities, grow the business to sustain future generations on the land, and focus on becoming a carbon positive organisation.

Duncan also cofounded the Scottish Wedding Industry Alliance, to give the industry a voice during the Covid-19 pandemic. He continues as chair. The organisation is now working to promote Scotland as the wedding destination of choice. He brings to the SOSE board an understanding of rural businesses, and a can-do attitude aimed at getting things done, with a special focus on business operations.



Lindsay McDowall
Head of Family Engagement for the
National Deaf Children's Society (NDCS)

Lindsay McDowall worked across the private and public sectors both in the UK and overseas, before moving into the third sector, where she has been a senior manager for the past ten years.

Currently Lindsay is Head of Family Engagement for the National Deaf Children's Society (NDCS), managing services across the UK. She also runs a holiday let business in Dumfries. Previously, Lindsay was Head of Services for Visibility Scotland, managing projects and services across Scotland. Locally, Lindsay led and developed an award-winning community project in Dumfries and Galloway for Visibility Scotland, and has a strong interest in building community resilience, as well as improving opportunities for young people across the South of Scotland.



Jeremy Sainsbury OBE, FRICS
Director, Natural Power

Jeremy has over 30 years' experience in the renewable energy sector. He has been instrumental in the growth of international renewable energy consultancy Natural Power. The company employed just seven people when he joined as a director, now has 420 staff across 14 offices in four countries and is still growing at 10% per annum. He is responsible for policy and regulation issues, natural power, photovoltaics, hydro, biomass and renewable heat.

Jeremy is based at the international headquarters of Natural Power, Forrest Estate, in the heart of rural Dumfries and Galloway. Jeremy is a serving director of Energy UK, chairing their Renewable Energy Committee, and is a member of the Generation Committee. He works closely with the Scottish Government on policy for the renewable sector. Jeremy was a founder member of Scottish Renewables, serving as chairman, vice chairman and chair of the grid group and serving on the board from 2000-2019. In 2013, he was awarded an OBE for services to renewable energy and to the community of Dumfries and Galloway.



Paul Winstanley
CEO, CENSIS

Paul runs one of the Scottish Innovation Centres, CENSIS. Their primary mission is to create economic activity (new companies, new products, new jobs) in their thematic area. They do this by building and supporting relationships between companies and academic institutions, or by supporting the company directly.

Paul studied Applied Physics at university. He has worked across the public and private sector nationally and internationally. On moving back to the UK, he did a period of consulting, and founded his own company. This developed his interest in economic development and laid the foundation for his current role.

Paul brings two areas of expertise to the board. Firstly, he has deep knowledge of digital transformation, and supports Scottish Government on the digital transformation of manufacturing. Secondly, he has worked on the development and delivery of innovative projects for many years and is passionate about using innovation to deliver beneficial outcomes.

Appendix B

Our Organisation

As an organisation we are structured around four Directorates – Finance and Corporate Resources; Net Zero; Strategy, Partnership & Engagement; and Place and Enterprise – led by our Chief Executive, Jane Morrison Ross. Our current headcount is 145 employees.



Jane Morrison-Ross
Chief Executive, South of Scotland Enterprise



Anthony Daye
Director of Finance and Corporate Resources

- Facilities & Office
- Finance & Audit
- HR & Information Governance
- IT & Digital
- Procurement & Legal
- Programme Management
- Risk & Compliance

29 Employees



Dr Martin Valenti
Director of Net Zero and Entrepreneurship

- Entrepreneurship
- Fair Work
- Natural Capital
- Net Zero

27 Employees



Karen Jackson
Director of Strategy, Partnership & Engagement

- Communication & Marketing
- Economy & Insights
- Strategy, Planning & Partnerships

27 Employees



Bryan McGrath
Director of Place and Enterprise

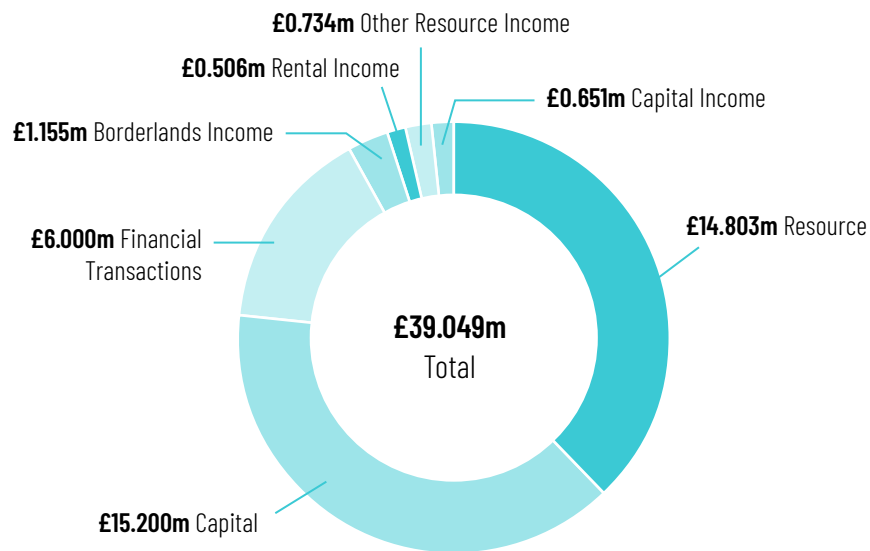
- Business Development
- Community Development
- Economic Infrastructure

62 Employees

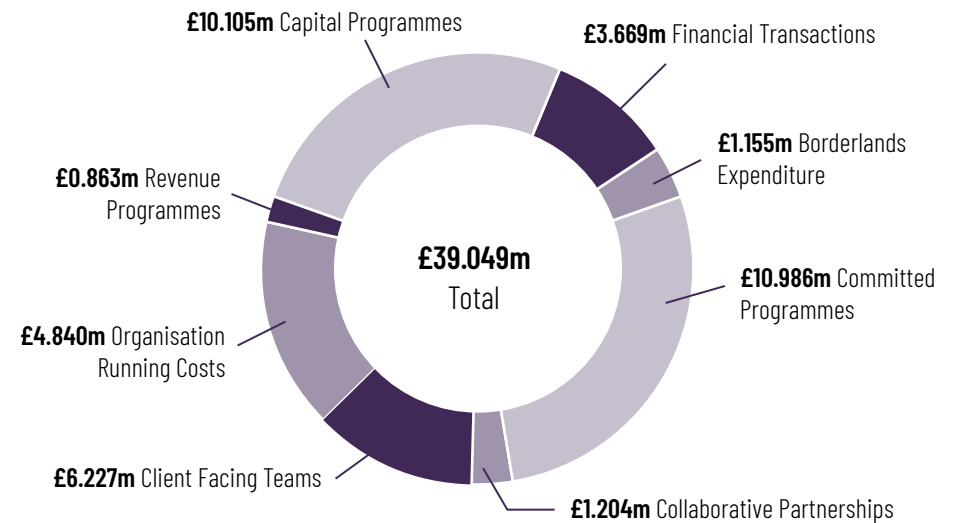
Appendix C

Our Operating Budget for 2022/23

INCOME



INVESTMENTS



Note:

- The overall budget for SOSE is £39.049m which includes other elements relating to administration and non-cash items
- Collaborative Partnerships with other strategic public bodies includes finance, IT and HR support
- Organisation running costs include all remaining staff costs out with the client facing teams, and other business and estates costs

Appendix D

Summary of Grant Awards 2021-2022

Scottish Government Funds, administered by SOSE



Scottish Wedding Industry Fund Top up Funding

SOSE was involved in distributing this funding in two phases across 2021/22 - to those businesses across the South of Scotland who benefitted from the original 2020/21 Scottish Wedding Industry Funding, the purpose of which was to help as many businesses as possible operating in the Scottish wedding industry - and their supply chain - to survive the COVID-19 pandemic and to restart once restrictions eased.

Total funding awarded:
£279,875

Number of businesses supported:
160



Tourism Recovery & Leadership Fund

SOSE joined a panel with representatives from Scottish Enterprise, Highlands and Islands Enterprise, Skills Development Scotland, Visit Scotland and Scottish Tourism Alliance to assess ten project applications from across Scotland for this pilot fund to support innovative, collaborative, high-impact projects that would support recovery from COVID-19. Two projects from the South of Scotland were successful.

Total funding awarded:
£80,196

Number of businesses supported:
2

SOSE's Funds:

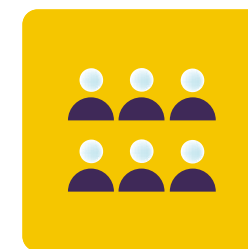


Business Improvement and Innovation Fund

To assist businesses looking to improve or work on innovative working practices that help them trade more effectively in existing or new markets, and to sustain and grow businesses and employment in the South of Scotland in support of inclusive economic growth post-COVID.

Total funding awarded:
£6,299,970

Number of businesses supported:
89



Enterprising Communities Development and Opportunities Fund

To support community organisations and other inclusive businesses to improve or develop enterprising projects that have greater social, economic and environmental impact and sustainability, including the acquisition and development of viable community assets.

Total funding awarded:
£4,699,970

Number of businesses supported:
35

SOSE's Funds



Covid Recovery and Restart Fund

To support businesses who have no other sources of cash, to sustain businesses and employment in the South of Scotland so that they can recover and grow post-COVID.

Total funding awarded:

£1,567,009

Number of businesses supported:

34



Green Jobs Fund

To support businesses, and social enterprises that are creating new and emerging green jobs, utilising specific funding from Scottish Government.

Total funding awarded:

£549,496

Number of businesses supported:

2



Community Ideas Fund

To support communities, social entrepreneurs and existing community organisations to initiate new ideas in response to identified community, social, or environmental need.

Total funding awarded:

£240,124

Number of businesses supported:

28



Priority Town Regeneration Programme

To provide additional capacity to communities to help drive economic development through identifying and progressing enterprising community activities that have potentially sustainable revenue streams.

Total funding awarded:

£144,868

Number of businesses supported:

3

SOSE Loan Funding



Loan Funding Awarded

As our focus looked more towards development and expansion and less on COVID-19 rescue and recovery, SOSE was able to offer more flexible models of finance for organisations looking to improve and innovate. Loans, or a mix of grant and loan, were discussed with most projects seeking funding support.

Total funding awarded:

£2,077,197

Number of businesses supported:

6

Contact Us

Find out more and sign up for our newsletter at
www.southofscotlandenterprise.com

Or get in touch to find out how we can tailor our support to your individual needs and circumstances

www.southofscotlandenterprise.com/contact-us
0300 304 8888

To request this document in an alternative format, such as large print, different language or on coloured paper please get in touch with us.

Correct as of November 2022

