

**THE CITY OF EDINBURGH COUNCIL  
&  
THE UNIVERSITY OF ST ANDREWS**

**EDINBURGH 2020**

**SCENARIO PLANNING EXERCISE  
FOR THE EDINBURGH CITY REGION**

**FINAL REPORT**

**January 2004**



**◆ EDINBURGH ◆**  
THE CITY OF EDINBURGH COUNCIL

This report has been prepared by The City of Edinburgh Council. The Scenario Planning Exercise for Edinburgh City Region (ECR) was undertaken in conjunction with the University of St. Andrews. The exercise was sponsored by the following organisations:

- The City of Edinburgh Council
- Scottish Enterprise Edinburgh & Lothian
- East Lothian Council
- Midlothian Council
- West Lothian Council
- Scottish Financial Enterprise
- Lothian Health Board

### **Disclaimer**

The development of these scenarios under the auspices of the University of St. Andrews, the sponsors and steering group members does not imply that it recommends either a) their adoption, b) any particular policy implication or c) the commitment of any expenditures or resources.

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## **APPENDICES (Separate Documents)**

- A One-to-One and Group Workshops Detailed Interview Notes Workbook
- B Feedback Analysis Workshop Slides
- C Issues Workshops Notes
- D Scenarios Development Workshop Notes

## **ES EXECUTIVE SUMMARY**

- ES1 This report summarises the major scenario planning exercise recently undertaken by The City of Edinburgh Council and University of St. Andrews in partnership with key public agencies and the private sector. A complete list of the organisations involved and their representatives is attached in the “Participants and Acknowledgements” section of this report.
- ES2 The two scenarios trace two possible futures for the ECR between now and 2020. “Capital Punishment” illustrates how a long-run genteel decline would impact on Edinburgh. Conversely, “Capital Gains” shows how the city could become the Capital of Northern Europe.
- ES3 “Capital Punishment” features a cushioned decline, deteriorating quality of life, conservative views, gridlock and poor public transport, lack of social housing, disjointed and timid vision, infrastructure decay, business becomes detached, government spending focuses on the West of Scotland, exodus of head offices and a general feel bad factor.
- ES4 “Capital Gains” illustrates the impact of a boom in the financial sector, population growth, the introduction of an integrated solution to the transport problem, desirable quality of life, political change, women in leadership, bold vision, great pride, big events, immigration and a feel good factor.
- ES5 Underlying both scenarios is the following set of key assumptions:
- Scotland’s demographic decline
  - Feminisation of the labour market
  - Financial pressures on public services
  - Continued growth of globalisation.
- ES6 The scenarios focus on a series of critical choices to be made over the next 2 decades. These include transport, public/private engagement, leadership, networks, a voice for Edinburgh and immigration policy.
- ES7 The two futures can be characterised by a series of consequences:
- Growth v stagnation
  - Resilience v fragility
  - Diversity v homogeneity
  - Dynamism v decay.
- ES8 The two scenarios that have emerged from the process are robust and well founded, based on a lengthy primary data gathering exercise. They have been deliberately written in a non-academic style to stimulate debate and engage as wide an audience as possible.

- ES9 In publishing these scenarios the project sponsors are launching a consultation about the future of the issues facing the ECR.
- ES10 It is intended that the views from this consultation will be brought to a joint conference with The Centre for Scottish Public Policy in spring 2004. The conference will focus on ECR in the 21<sup>st</sup> century.
- ES11 Thereafter it is intended to develop a shared vision for ECR in 21st century that will shape and inform the strategy and actions of all those responsible for, and with an interest in, the region's future prosperity.

## 1 SCENARIOS

- 1.1 The scenarios for ECR have been published in a shorter, summary format available separately from The City of Edinburgh Council. The full scenarios are detailed below.

### **Capital Punishment**

- 1.2 The Lord Provost was not looking forward to the press conference. Although she knew that Edinburgh desperately needed assistance from the Executive she still could not help feeling it was an enormous admission of economic failure to have to establish an Employment Task Force for the city. But she had no choice, not now the Royal Bank had successfully concluded its takeover of the Chinese State Bank and under its new branding as the Royal Bank of Beijing had announced that it was moving its HQ, and the remaining processing jobs, to Pearl River City. At the turn of the century, when she had been finishing her MBA at Harvard, it had all looked so different. Where had it all gone wrong?
- 1.3 The decline of a great city is a slow process. Capital assets accumulated over centuries provide a buffer against the full impact of deterioration in competitiveness. Many are the cities which have maintained outward splendour while behind elegant facades the family silver has been sold off to pay for keeping up appearances - think of the long, slow decay of Venice. So it proved in Edinburgh's case. The city's heritage of social, economic and physical capital protected it from feeling the full effect of the collapse of its key industries in the first two decades of the twenty-first century. It was not until 2020 that the majority in the city were willing to recognise that two decades of genteel decline had all but bankrupted the city.
- 1.4 The last decade had been brutal. The ageing of Scotland's population had hit hard – though not in the way the doom-merchants had warned in the nineties. There was no huge increase in the costs of either long term care or health care. Older people had lived longer – indeed after the state pension age was raised to 70 they had grudgingly worked longer – and been healthier than previous generations. The problem was their dead hand on the economy. As the birth-rate declined so too did the business birth-rate. Younger people, it turned out, were both more innovative and less risk-averse than their elders and therefore more likely to establish new companies. They were also a far more receptive customer base for new goods and services. Eventually annual growth had declined to 0.5% a year.
- 1.5 Too late Scotland regretted not having been a full member of the Baltic Federation. The Baltic strategy in the years following EU enlargement had been bold. Firstly, openly welcoming workers from the second wave accession countries, particularly Turkey, Bosnia and Croatia, had led to a huge boom in productivity. As in America, a regular influx of new workers created new jobs not unemployment. Secondly, the free trade agreement with St Petersburg had consolidated the Western Capital of the new Russia as the fastest growing

European metroplex - the Dallas/Fort Worth of the North. Few were surprised when Scottish and Newcastle moved their HQ there in 2015 – after all Baltika was by far their biggest global brand. Thirdly, the powerful north-south relationships between the Baltic Federation and NEPAD (the New Economic Partnership for African Development) were paying off. Flows of aid, trade and workers back and forth were generating real growth and prosperity in Africa and providing a steady supply of entrepreneurial talent to the Baltic economies.

- 1.6 Edinburgh had failed to position itself for the demographic downturn. Throughout the 1990s and the 2000s it had faced no real labour supply issues. Demand for workers grew, but the travel to work area grew just as fast. As long as workers in the Lothians, Borders and even Lanarkshire were willing – and able – to travel to Edinburgh what was the problem? Two fundamental ones were revealed in short order.
- 1.7 First, population downturn is like sand in an hourglass – drifting slowly at first but then with an ever quickening pace. The battles soon started between public and private sector organisations. Of course everyone needed graduates. All the professions, from accountancy and the law through to teaching and medicine were built on a model of recruiting young people at age 21 and keeping them until 65. Scarcity resulted in labour costs being bid up well beyond what the public sector could pay. The normal route of international recruitment was not open. In part this was because the US was drawing service labour – particularly medical workers – towards itself as its baby boomers turned 60 and demanded previously unmatched standards of personal care. In part also it reflected the fact that England was able to out-bid Scotland for those who were willing to come to the UK. The Barnett squeeze had bitten hard – and the imposition of absolute equality of spending in the 2010s had been the final nail. The good times of the early 21st century were not coming back. But most devastatingly the brutal truth was that the most mobile labour in the world was black, Asian and Chinese – and given the choice they did not want to come to Scotland. They valued racial diversity in their host communities. And it was too late to prove that Edinburgh could provide what they wanted.
- 1.8 Second, workers will only travel if the journey is of predictable ease and length. The long boom of the 2000s proved sustainable because the city reached deeper into the surrounding Labour market. Women from Winchburgh once condemned to part-time minimum wage employment were occupying skilled jobs in the city at higher pay. Midlothian's long term unemployment had disappeared into the diverse service industries of the capital. But as funding crunches hit the Executive infrastructure investment was the first to suffer – it is so easy to cut capital and sacrifice the long term for the short term. The cracks took a while to appear, but not long. The patch and mend of the 2000s had been on top of 25 years of under-investment. Random road closures and train cancellations caused journey times to lengthen unpredictably. When they stretched to over an hour and a quarter some workers from outlying areas chose to value their leisure time more highly than the pay they could get in the city and started to work closer to home. They were often

returning to relatively low paid, and often part time jobs, but that did not matter so long as they could collect their kids from school. Some nimble organisations relocated to the edge of the city region and for a time it looked as though Dalkeith, North Berwick and Galashiels would become to Edinburgh as Luton, Croydon and Brighton are to London. But too many moves became bogged down in planning appeals, land use disputes and boundary arguments between public authorities.

- 1.9 If only the city had been different in the first decade of the 21st century. There had always been those whose underlying view could be expressed as “Edinburgh’s quite big enough, thanks”. In the past they had grumbled about change – what, precisely, was the need for more restaurants? And from time to time they had combined to defeat individual planning applications. But by and large they had had to adjust to the sustained growth of the 1990s and Edinburgh’s gradual change into a more outward-looking, European city. However, they kept their discontent bottled up and cherished it. When road pricing was suggested they got their chance to strike back against the forces of change. The whole question seemed blindingly obvious to them. If growth brought congestion, then the answer was to end the growth. And if you couldn’t end the growth directly then perhaps the answer was to let the congestion carry on for long enough to make the growth go away.
- 1.10 At this point things began to lock into a spiral of decline. Growth continued unabated at first, though business, frustrated at the lack of progress on investing in transport infrastructure, began to detach from engagement with the local authority except where absolutely necessary. Lacking new investment, public transport became increasingly a poor service for poor people. More journeys to work were made by car and overall journey times by road continued to increase. Without new transport links housing developments were given over completely to housing for professionals. Working families had to move further and further out of Edinburgh and were faced with the choice of unsustainably long journeys to work by public transport or driving a car. Congestion built and built.
- 1.11 Gridlock on the streets was not helped by an inability to find a modus vivendi with Glasgow. The two cities could have combined to compete. There was the Scandinavian industrial model of co-opetition - co-operating where you can, competing where you must. Instead there was the zero-sum game of total conflict. The result was the Scottish Executive missed the opportunity to invest in a truly vibrant economic region in the central belt – the opportunities to create synergy and develop trust between Scotland’s two great cities were overlooked. Everything operated on the basis that while Edinburgh had jobs then Glasgow should have any spare public investment. So Glasgow got its much needed airport rail-link and Cross-Rail. But it was at the expense of equally needed investment in Edinburgh. And the long-term challenge of making it easier for companies and workers to get between the twin cities was once again down-graded. Indeed, at Waverley Station the Strategic Rail Authority pushed through a cheap and cheerful re-development which left Edinburgh with renewed capacity constraints

within five years and still no adequate transfer between modes of transports. This did not bite at first, but by the time of the 2009 global turn-down things were turning nasty. Entrances to cities are critical to perceptions. Visitors, whether for business or tourism, who arrived by plane or by train to Edinburgh got one message loud and clear – “you’re on your own, no-one cares about how you get to where you are working or staying”. As companies with multiple bases started to think about reining in costs Edinburgh was increasingly failing to get the benefit of the doubt. Congestion wasted staff time and increased costs, high property prices bid up the cost of some labour and moved other workers so far out of the city that they did not want to travel back in, thereby creating a severe shortage at some levels. Tourism, a growth area for most of the 1990s and 2000s stumbled. The deteriorating public sphere put many off making return visits and, indeed, as environmental concerns continued to move up the social and political agenda across Europe many potential tourists simply declined to visit a capital which did not place sustainability centre stage.

- 1.12 It was a slow process at first, companies kept their offices in Edinburgh but started to divert growth into other lower cost, better serviced areas. Then the growth in the Indian economy started to impact. Just as in software development and call centre management smart Indian companies had started to move up the value chain, so they did with financial services. From phone lines to data processing to market intelligence to product development and finally to money management, the process was straightforward and inexorable. Where once Edinburgh had welcomed Asian workers and their families, now workers from Lothian were settling in Mumbai and Chennai.
- 1.13 At a distance it is no longer clear what the actual tipping point was. Many had warned that long term under-investment in the railway infrastructure on the East Coast could create substantial problems. The failure of the Winchburgh Tunnel and the lengthy closure of the Forth Railway Bridge were accepted by most and shrugged off phlegmatically – what can you expect from the railways. The most telling symbolic moment was the State Visit of the President of China Hu Jintao. His fond memories of visiting in 2001 were washed away when a fire on Lothian Road coincided with the rush hour and a pop concert at Murrayfield. Nothing moved for three hours, including Hu Jintao’s limousine. He may have laughed it off and compared it to downtown Shanghai but there were jobs at stake. We needed them and they went to Warsaw instead.
- 1.14 It turned out then that a lot of people had given up on Edinburgh – the city had gained a feel-bad factor. That was when corporate headquarters started to move out. And when they cut their sentimental ties they left completely – not just for somewhere else in Scotland or England but for the centre of the new EU where they knew that everything from transport to education would be in place and be high quality. For in the sharpest of all possible blows against the city it was now internationally recognised that our education system had fallen behind substantially. A funding squeeze on Scottish universities left them vulnerable – their best lecturers were poached and their research base withered. The screw

tightened as bright, ambitious undergraduates moved south for post-graduate work leaving Scotland's research base even narrower. Gradually the supply of overseas post-graduates dwindled to a trickle.

- 1.15 The final bitter twist came when the full consequences of head office relocation hit Edinburgh's established reputation as a cultural capital. First, as companies left, corporate sponsorship faded away from the International Festival reducing it to a shell of its former glory. Secondly, the flight of the high spending middle classes destabilised the delicate retail economy of central Edinburgh – the final indignity was when “Eurostretcher” moved into George Street. Finally, as shops, firms and people moved out of the historic buildings in the centre, the fabric of the Old and New Towns fell into disrepair. Maintaining world class architecture is expensive – and it relies on substantial, invisible investments of private money. Now, the situation was so bad UNESCO were considering removing World Heritage Site status from the capital.
- 1.16 In the end it was clear that Edinburgh's growth and prosperity in the 1990s were more fragile than most had understood. Most in the city had looked down on other conurbations when they tried to re-brand and market themselves. “Glasgow's miles better”, “I ♥ New York” – how déclassé. As the jibe went, if Edinburgh had a slogan it was the un-stated one – “Edinburgh's slightly superior”. The only trouble was, that was not true any more.

### **Capital Gains**

- 1.17 The Lord Provost relaxed as her flight took off. As the land fell away, below her she could see the data havens of Dunfermline, the bio-campus of Bathgate and the bullet train heading to Glasgow. Being the first leader of a European city to hold the post of President of the European Union was an enormous privilege, but having led the decade long fight to have city-regions acknowledged as the fundamental building blocks of the new European prosperity she did not anticipate anything she would be unable to handle. The very flight she was on was a symbol of Edinburgh's advance in the last two decades. It was hard to remember that the Executive had once had to underpin direct flights to and from Scotland and now all Edinburgh's major partner cities – LA, Shanghai, Petersburg and Mumbai – were all on direct routes. With a million people living in the City Region air travel opportunities had been transformed. Perhaps it could have been different, but somehow it had all gone right.
- 1.18 The Edinburgh City Region's growth at the end of the twentieth century had taken many by surprise. Respectable, reliable prosperity had always been anticipated but it was the long boom in financial services which turned the capital into the key economic driver of the whole of Scotland which was transformative. Growth, though, brought with it congestion as well as jobs. Though workers travelled into Edinburgh and the Lothians from increasingly great distances, investment in the transport infrastructure did not follow. Public transport did not provide the frequency, flexibility or quality of journey demanded by many. The result was

many more journeys by car on a fraying network of roads. Edinburgh was in sight of gridlock. Paradoxically, it was the prospect of immobility that unlocked the vision and leadership that has given Edinburgh its most successful decades.

- 1.19 The turning point was the creation of a modern transport infrastructure for the Edinburgh City Region on the model of a European city. This required substantial investment, but there was no easy source: capital was not readily available from a cash-strapped Executive; nor did anyone imagine that either the city's council tax payers or its businesses could foot the bill either. The key was understanding that road infrastructure was a utility and then finding an intelligent way to charge for usage. The proposal was then embedded in a broader vision of the future of the Edinburgh City Region. This vision was socially inclusive in shape: improving transport links throughout the Lothians, bringing opportunities to disadvantaged communities, transforming land values and reinvesting the gain in the public sphere. The paradigm was that of classic Northern European social democracy – we will all do well only if we can all do well together. The optimism and energy of that sense of the future was a critical factor in getting almost all of the region's different interests to sign up to a common vision and to campaign for it.
- 1.20 The new revenue streams allowed the rapid construction of a modern tram network. As trams started running urban space was redefined, redeveloped and, where possible, returned to local communities in the form of wider pavements, gardens and even new urban parks. Previously inaccessible land became developable but where once pure commercial demands would have driven projects business and amenity groups agreed on the need for substantial provision of social housing. The tide of the 1990s which had swept working families further out of Edinburgh as young professionals priced them out of previously mixed neighbourhoods was reversed. Without the need for continual access to cars denser development spread out from the city centre again as it had once done in the nineteenth century.
- 1.21 The campaigners for change realised that they had stumbled on something new and powerful – the creativity of networked alliances. On the surface environmentalists might be seen to have interest which were completely at odds with those of business. Yet, in place of disputes and trade offs, it seemed that there were many win-win situations. Denser housing and modernised public transport provided a massive boost to business. Retail firms had more customers, service industries found it easier to get staff once they had reliable journeys to work, and all organisations found recruitment problems easing – busy lively centres beat desiccated business parks hands-down. Even the most committed conservationists realised that a city needed to be wealth generating if it was to provide effective stewardship of its physical and cultural heritage. As the new approach to transport developed it became a subtler – but even more powerful – economic driver. Because changes were funded by charges mainly paid by residents of Edinburgh and the Lothians an immense effort was made to explicitly demonstrate benefits to those who had paid. Gradually at first, then more quickly, public transport shifted from its provider driven perspective – cheap but inflexible

routes – to a more customer oriented service. Just as the coach industry had modernised from bone-rattling charabancs, so buses became smaller, more frequent and much more comfortable. Equally important was the way in which investment was ploughed back into the surrounding communities outside the city. Rail, road and bus improvements became – quite literally - the routes to prosperity for those communities in the Lothians which had missed the full benefit of the long boom of the nineties.

- 1.22 The vision which had been articulated for the future of the Edinburgh City Region proved powerful – and lasting. A virtuous circle became established. As businesses grew they generated increasing wealth. As they required new employees they worked with local groups to extend opportunities out to those who had traditionally missed out on them. Where new infrastructure – whether training and skills or physical transport links – was required to bring communities closer to the labour market, business lobbied and part-funded. The rising tide was raising all boats. However, one major problem remained - Edinburgh was still finding itself characterised as the home of Scottish government. There was need for the capital to have a distinctive identity. Holyrood had to be to Edinburgh as Westminster was to London – a hugely important, but not a determinant part of the whole. In part this required the establishment of a clear voice that spoke for Edinburgh. In previous decades the solution might well have been simply an adaptation to existing political structures. Now, with the power of networked leadership apparent, a truly twenty-first century solution was found. All mobilised behind the vision for the capital, each group making its own part of the case for change – the slogan soon became “one vision, many voices”. Central to that vision was the city’s status as a capital with a clear European, indeed world, identity. As a capital Edinburgh had specific needs, but more importantly it had broader ambitions than Scotland’s other cities. The tourist industry had for long wanted Edinburgh to be the most popular destination in Northern Europe. This ambition was co-opted and then elevated by the wider civic coalition into the stretching target of becoming the “capital of Northern Europe”. By which was meant becoming the best place in Northern Europe to live, work and learn. Edinburgh’s networked leadership decided that key to achieving that must be achieving the location of at least one major international institution to the capital by 2015. The creation of the World Environmental Organisation – the sustainable mirror to the World Trade Organisation – proved just the right opportunity. Combining World Heritage status with a sustainably managed economy and access to excellent education (being in English was an additional bonus) and a world class environment (including golf) proved just the right package for international diplomatic class.
- 1.23 Success in this sphere led to greater ambitions. London had failed to win the Olympics in 2012 – transport congestion and quality of life issues overwhelmed their pitch. Spurred on by this failure Edinburgh decided that the time had arrived for a major sports event to Scotland – more precisely to the Central Belt. With the success of the Ryder Cup in 2013 the bid for Euro 2020 proved unstoppable. Next stop the World Cup argued some.

- 1.24 Achievement in one sphere – the new tram system – had become infectious. Optimism began to characterise the approach to Edinburgh’s other abiding problems. Issues that would normally have been unresolved or fudged were instead fully thought through. The redevelopment of Waverley Station was a case in point. The approach of the Strategic Rail Authority and Network Rail was swept aside by a tide of public outrage. The safe, desiccated, short-term cost-benefit driven plans were rejected. This was a once in a hundred year development and it had to be done in a way that adequately stewarded this vital public asset. The rebuilt station preserved the best of the old, created a model transport interchange and created substantial expanded capacity.
- 1.25 The feel-good factor spread. As did the ambition to be the best. The redevelopment of Princes Street was a model in creating public value. A blighted street-scape of decaying retail outlets has become a world-renowned architectural achievement, proving – at last – that Edinburgh’s built heritage did not judder to a halt after the Victorian era. The long decline of city centre shopping was reversed as the new Princes Street reinforced the impact of new housing and public transport. The city was becoming liveable in a completely new way.
- 1.26 Not everything went smoothly. Edinburgh’s local politicians were swift to recognise that what was emerging around them was a new form of networked civic leadership that could not be beaten – only joined. But the institutional form of local government in Scotland took longer to catch up. It was not until the mid-2010s that Scotland saw its first directly elected Provosts. The majority of these were women. The long march through the institutions which had started fifty years earlier in the mid-1960s was finally coming to fruition.
- 1.27 Women’s place in the new leadership positions looks obvious in retrospect. While many local authorities were paralysed by a lack of local leadership there were still a multiplicity of issues which had to be addressed within communities. Many of these were quality of life issues, or work-life issues, like parks, child care or environmental concerns. Women organised not merely to agitate on these matters but often to provide the solution through direct or indirect models of provision. With traditional political leadership stuck in a quagmire more and more women came to prominence in networked organisations – a dispersed form which suited them far more than the hierarchical structure of mainstream parties. When direct elections came along a generation of successful women activists seized the power.
- 1.28 The City Region was challenged when the long boom which started in the 1990s came to an end. This could have been dreadful, coming as it did as the Barnett squeeze really bit in. The pressures of the down-turn demonstrated how right it had been to use resources in the 2000s to invest in physical, intellectual and social infrastructure for the future. But three things, above all else, helped Edinburgh here.
- 1.29 Firstly, the expansion of the European Union – and the dawning reality of a single market in banking and financial services had been hugely beneficial. Scottish

based organisations swooped on opportunities. Many US companies had realised that they needed a European head office now that the EU was such a significant and growing market. Edinburgh was their first choice for similar reasons to those which brought the WEO to the capital.

- 1.30 Secondly, and perhaps more importantly, Edinburgh had taken a leading position in the globalising health and education industries. The strategic advantage in health came about initially because of a strategic advantage in the regulatory framework. The combination of UK wide legislation permitting stem cell experimentation combined with Scottish intellectual property law proved an enormous attraction to US biotech companies. Then building on this, a medical sciences corridor was created on the south of Edinburgh leveraging Medical Research Council grants together with University research, development and commercial spin-offs and core NHS expenditure. Education too flourished for a number of reasons. Edinburgh's education had retained its international reputation for quality and was marketing itself hard. At university level this had a double pay-off. The fees from overseas students supported a substantial increase in the research base which then itself span off new industrial applications. More importantly, overseas doctoral and post-doctoral students liked the feel of the new dynamism in Edinburgh and they wanted to be a part of it. Staying, they helped to feed the growing SME sector and they enriched the mix of the capital. Talent and heterogeneity became pillars of the Edinburgh economy. An important new educational industry emerged: the international market in secondary education. Important emerging economies – China, Russia and India – do not have enough decent schooling to satisfy their growing middle classes. Edinburgh's large private sector absorbed a lot of that demand. The young people who have started to come through Edinburgh schools are the leaders of the next generation in their countries – and they are Scotophiles.
- 1.31 Thirdly, an open-door approach to immigration. It had started when refugees and asylum seekers had been allowed to fill long-term vacancies in the National Health Service. The city had rapidly realised that there was much sense in being willing to host dispersal centres because then potential workers would be on your doorstep. It was consolidated by the clever use of the provisions of the Home Office's new Green Card scheme to provide residency not only for the smartest students but also to draw in near-accession workers along with those from the new EU. As in the US immigration fuelled growth and prosperity.
- 1.32 In the late 1990s, the Lord Provost reflected, she had heard the Vice-President of the World Bank identify five key industries for the next century. Edinburgh was a world leader in three of them – finance, education and biotechnology. Not bad, she thought, as she rehearsed the Kyiv speech.

## **2 BACKGROUND**

### **Report Structure**

2.1 This report is presented in two sections. The first section presents an outline of the background to the process itself and the second section “Exercise” describes how the exercise was undertaken. In essence, the principles behind it were:

- To use St Andrews’ University as a facilitator and coach, so The City of Edinburgh Council and its partners learn the processes and also “own” the outcomes and resultant scenarios.
- To involve a broad constitution of those that live and work in the ECR in order to understand what they believe are the important issues facing the ECR over the next 20 years and so that they may also “own” the scenarios.
- To explore how the most important/uncertain of those issues might evolve over the next 20 years and to weave a number of scenarios from the outcomes.
- To test current policies and strategies against the scenarios, identify the “gaps” and adjust/change policies and strategies as necessary.
- To generate a common and aspirational vision for the ECR using this process as an important building block.

### **Project History**

2.2 The need to better understand the issues facing the key sectors of the city’s economy arose out of a number of internal meetings within the City Development Department in relation to the emerging draft Structure Plan and discussions around The City of Edinburgh Council’s response to The Royal Bank of Scotland’s plans to develop their world headquarters at Gogarburn.

2.3 Within the City Development’s Economic Development service it was decided that an extensive programme of consultations with senior managers of companies and institutions in the city’s key sectors would provide a significant insight into the most pressing issues. It was also decided that Economic Development staff, as opposed to external consultants, would undertake the consultation programme.

2.4 During September 2001, 48 key representatives from the various sectors highlighted above were identified and contacted. All those consulted held senior management positions, the majority at Chief Executive level.

2.5 From the findings in “A Report into the Key Sectors of Edinburgh’s Economy”, it emerged that the three most important issues/challenges facing the city in the medium to long term were identified, in order of importance, as follows:

- Transport

- Labour
  - Accommodation (especially private housing).
- 2.6 On the basis of issues raised and high level of interest expressed during the consultation programme, The City of Edinburgh Council considered that a scenario planning exercise would be worthwhile. It was intended that the work would add value and input to the structure planning process and generate a future vision for the city. In turn, this would be used to engage with the Edinburgh and Lothian Local Economic Forum and other stakeholders with an interest in economic development to facilitate a debate on future pathways. The exercise would also articulate a revised economic development strategy for the city and inform the various policies of the city's key agencies.
- 2.7 In addition to raising interest and awareness of the major issues facing the city, the key sectors consultation programme generated a desire to take positive action to address the issues raised. Accordingly, The City of Edinburgh Council felt that having successfully completed the preliminary work, the time was right to develop an aspirational vision for the city through a wide-ranging and inclusive scenario planning exercise.
- 2.8 Professor Peter McKiernan, Professor of Management at the University of St. Andrews, was commissioned to undertake the scenario planning exercise for ECR. He led the work for the well-regarded "Scenarios for Scotland – A journey to 2015" and has undertaken several large scenario planning projects for major public and private bodies.
- 2.9 The project was launched in March 2003. The ECR scenarios were sponsored by the following organisations:
- The City of Edinburgh Council
  - Scottish Enterprise Edinburgh & Lothian
  - East Lothian Council
  - Midlothian Council
  - West Lothian Council
  - Scottish Financial Enterprise
  - Lothian Health Board.
- 2.10 The steering group was constructed from representatives from the project sponsors along with representatives of the following organisations and companies:
- Edinburgh and Lothians Tourist Board

- Scottish Retail Consortium
  - The Royal Bank of Scotland Group
  - HBOS
  - Ryden
  - Halcrow.
- 2.11 The members of this group are listed in the “Participants and Acknowledgements” section towards the end of this report.

### **Why Scenarios?**

- 2.12 The scenario process explores, in depth, the critical uncertainties that will influence the ECR over the next 20 years. Key external factors include: the global/UK and Scottish economic performances, competition from other cities/regions, political developments (local, Scottish, etc.), demographics, taxation, expectations of citizens and society as a whole, environmental developments, technological advancement and so on.
- 2.13 Having explored these issues in detail, two scenarios were written to illustrate how they might evolve and, more importantly, highlight the decisions and choices that public leaders and policy makers would face.
- 2.14 Scenarios can also provide:
- A road map against which the progress of the ECR can be measured
  - A common and inclusive focus
  - An inspirational future to aim for
  - A forum that stimulates debate and leads to a set of commonly agreed actions and their priority
  - A practical and proven learning vehicle for a strategic conversation
  - A powerful set of data on which to build policy and strategy.
- 2.15 It is very difficult to predict the future, especially when looking into the medium/long term. Scenarios do not try to predict or forecast. They explore different avenues of how critical issues facing the ECR might evolve in the future. They often look at both an optimistic and pessimistic future based on the facts and opinions gathered and formulated during the scenario process. A recent example of this type of scenario formulation is that developed for Scotland by the University of St Andrews in which a High Road scenario (optimistic) and a Low

Road scenario (pessimistic) painted a picture of how Scotland might look in 2020. However, such pictures are rarely all positive or all negative. Sometimes, issues have to reach breaking point before recovery is possible and, in negative stories, there are often pockets of success.

- 2.16 Hopefully the ECR scenarios throw down a challenge to policy makers; the challenge is to make the most of the positive scenario and defend against issues that could lead towards the negative scenario. This is achieved by undertaking a “gap” analysis. This identifies a) those policies that require formulation to deal with any future that may come about and b) those resources that have to be built or acquired to achieve the aspirational scenario and avoid the threats inherent in the pessimistic one.

### **3 THE EXERCISE**

3.1 The scenario planning exercise involved the following 5 phases:

- Data gathering and analysis
- Feedback workshops
- Issues workshops
- Scenario writing
- Strategic review and development.

3.2 At the time of writing (January 2004) 4 phases have been completed. The following provides a brief description of what was done and why and also provides detail of the outcomes, illustrating how each completed phase provided the basis on which to proceed to the next one. In other words, the building blocks and evidence of information that has led to the published scenarios.

3.3 The exercise has been managed and controlled by the Steering Group. An Advisory Panel (listed in the “Participants and Acknowledgements”) was also formed, made up of those people who were invited but unfortunately could not commit the time to be members of the Steering Group but who wished to remain involved. They played a similar role as the Steering Group in helping to select those who should be interviewed, reviewing the draft scenarios and so on, but rarely were able to attend workshops or meetings.

3.4 Before commencement of the exercise, two meetings were held with the Steering Group and Advisory Panel scoping the question they wanted to explore using scenarios. After much discussion the following was agreed: “How might the ECR evolve over the next 20 years?”

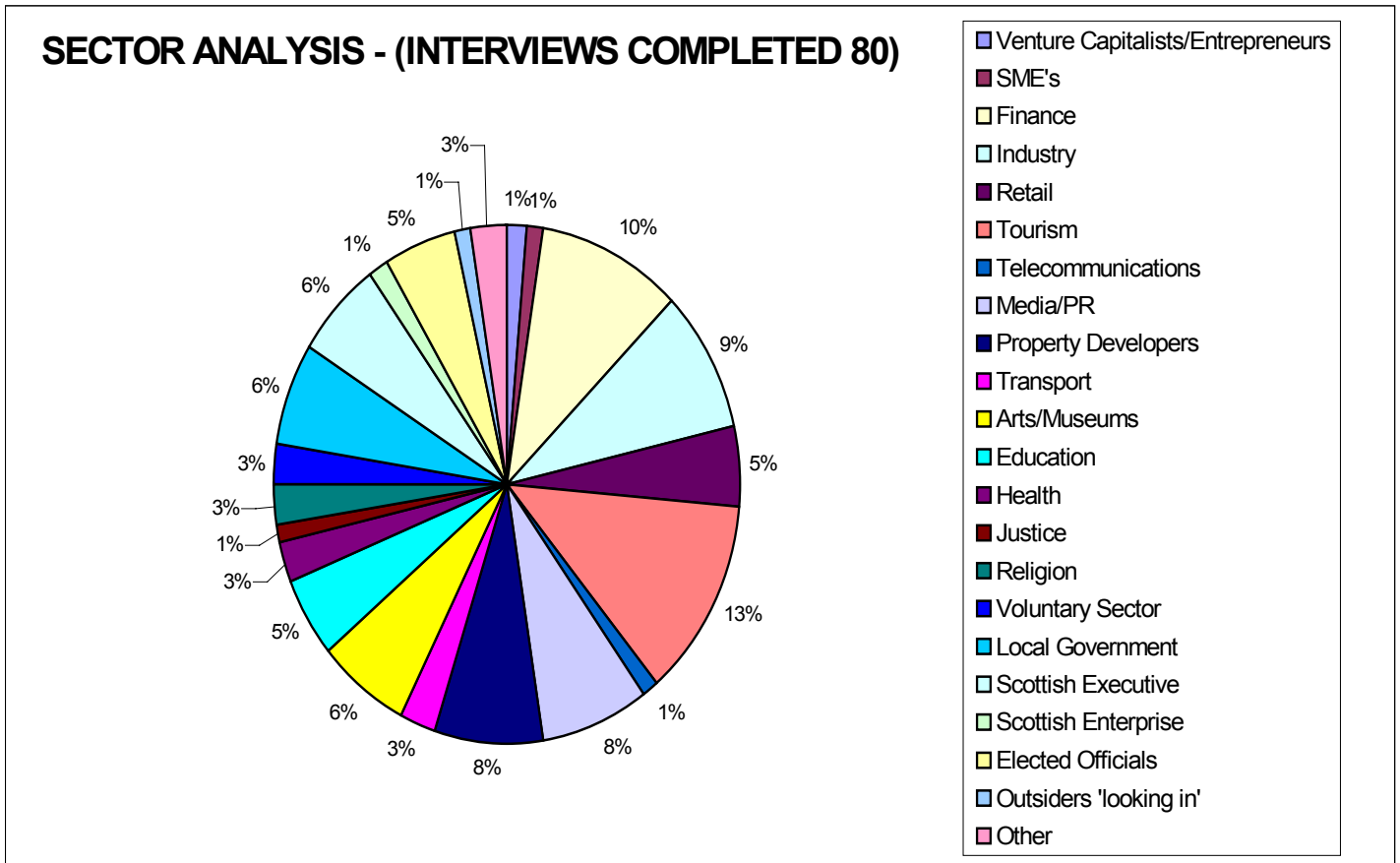
#### **Phase 1 – Data Gathering And Analysis**

##### ***Interviews – one-to-one interviews and group workshops***

3.5 The Project Plan suggested conducting 60 interviews with knowledgeable people and 4 group workshops. In the end, the Steering Group selected 116 to be interviewed on a one-to-one basis, of which 80 were happy to participate or able to do so in project timescales. Seven group workshops were also held. In total, approximately 150 people have been involved in the process. They represent a broad spectrum of society. (See “Participants and Acknowledgements” for names of participants).

3.6 The chart at Figure 1 illustrates the coverage within the various sectors of the ECR.

**FIGURE 1: COMPLETED INTERVIEWS BY SECTOR**



3.7 Seven open-ended questions were used in each interview. These are designed to allow interviewees to talk about those things that concerned them and not be led by questions from the interviewer. The questions used were:

- The Clairvoyant. If you could spend some time with someone who knew the outcome (future), what would you want to know? (i.e. what are the critical issues?)
- An optimistic outcome - optimistic but realistic. If things went well for the ECR, how would you expect it to perform? What would it look like?
- A pessimistic outcome. How could external forces/environment/influences within which the ECR operates hurt the ECR?
- The internal situation. From your knowledge of culture, organisations, systems and resources (including people), how would these have to be changed to achieve the optimistic outcome?
- Looking back how did the ECR get to where it is today?

- Looking forward, what decisions need to be made in the near term to achieve the long-term outcome?
  - The epitaph. If you had a mandate, without constraints, what more could the ECR do or achieve?
- 3.8 The detailed notes taken from the interviews and workshops were non-attributable. They were analysed by issue and ordered into a research workbook. All notes were amalgamated into a “One-to-One and Group Workshops Detailed Interview Notes Workbook” – Appendix A, a separate document.

### ***Desk Research***

- 3.9 A team of 5 post-graduate students from the University of St. Andrews reviewed the extant published material (articles, reports, web-based material, books) on ECR. They adopted a social science methodology developed from the CAFÉ principles used in the “Scenarios for Scotland” exercise. These principles cover major political, economic, social and technological influencers, significant events, a past and future event analysis, an analysis of data puzzles, significant technological breakthroughs, significant policy changes by major actors and the resolution or complication of key issues. Their results were compiled into a “Research Workbook” (available separately on request) to be used as part of Phase 2.

### **Phase 2 - Feedback Workshops**

- 3.10 From both workbooks, a member of the University team, who had not been involved in the process to date, Professor Peter Grinyer, undertook an analysis of the key emerging issues. This was done to ensure that, as far as possible, the analysis did not reflect any bias that other members of the team might have formed while conducting interviews, etc. The information was condensed into a series of slides containing the key messages that were used for a “Feedback Slides” – Appendix B, a separate document.
- 3.11 The purpose of the workshop was to “feedback” to the Steering Group the messages, issues, concerns, hopes and fears contained in the Workbooks, to ensure that issues had been explored and to give “ownership” of the analysis back to the Steering Group.
- 3.12 Once ownership had been taken back, the Steering Group were asked to identify from the analysis the 10 most important issues facing the ECR over the next 20 years in order of importance. They identified the following issues:

### **Ranking**

1. Economy
2. Quality of Life

3. Transport & communications
  4. Leadership and vision
  5. Education
  6. Social cohesion and inclusion
  7. Labour supply
  8. Housing
  9. Alliances (local and international)
  10. Global events.
- 3.13 From this list a matrix (Figure 2, p25) was formed showing not only the ranking of importance of these issues but, as well, the degree of uncertainty as to their outcome over the next 20 years.
- 3.14 Those “issues” appearing in the top right hand quadrant were identified as the most important and uncertain (uncertainty of outcome) ones facing the ECR over the next 20-year period. Accordingly, the Steering Group decided that these issues should be explored further during Phase 3.

### **Phase 3 - Issues Workshops**

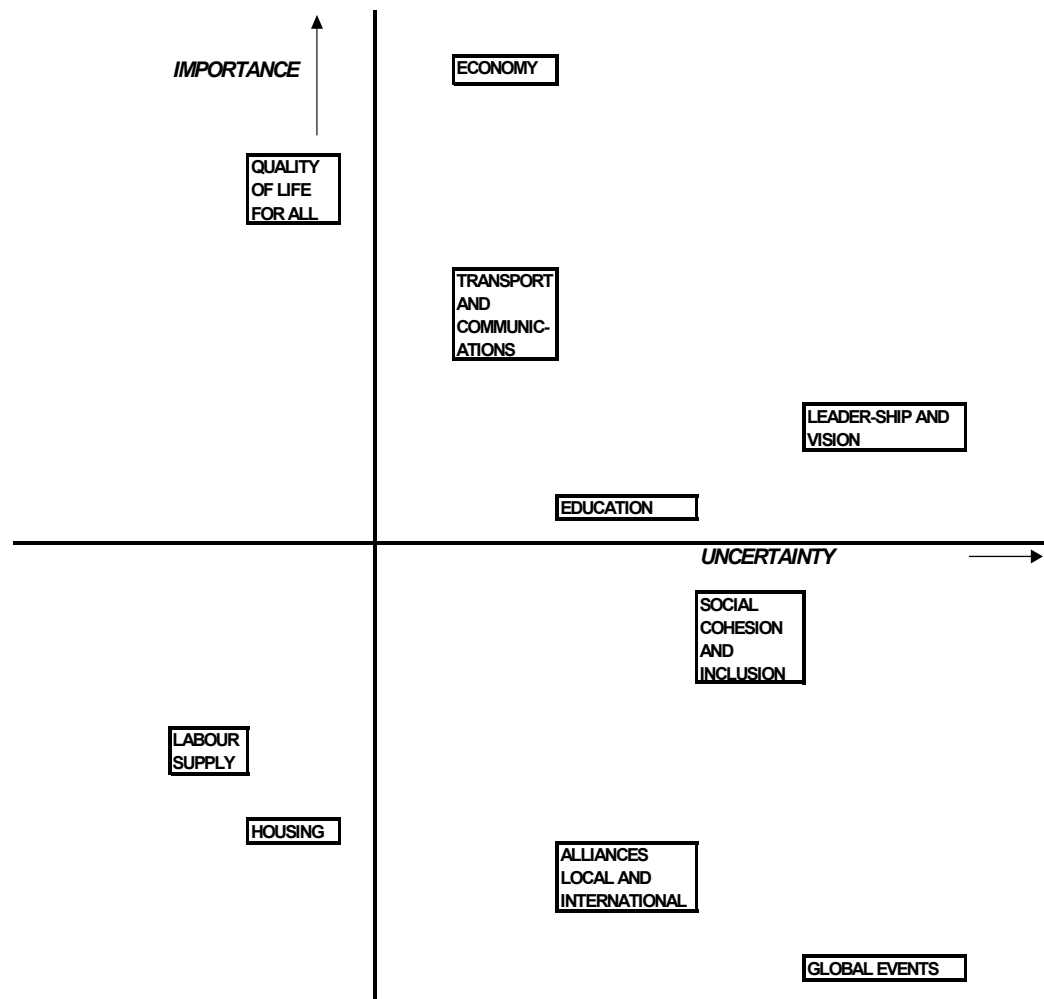
- 3.15 Members from the Steering Group and Advisory Committee were invited to attend four half-day workshops on the ECR Economy, Transport and Communications, Leadership and Vision and finally Education. Experts in these fields provided further thought-provoking observations and information. The thoughts and opinions of the experts were added to the existing database. This was used to develop the scenarios. The notes from the workshops are available as a separate document - Appendix C.

### **Phase 4 -Scenario Development**

- 3.16 Two half-day workshops were held to explore how each of the four most important /uncertain issues might evolve over the next 20 years. Members of Steering Group and Advisory Committee, as well as John McTernan, the scenario writer, attended the meetings. Attendees broke into two groups, each group being asked to develop both an aspirational and negative story around a particular issue e.g. the economy. They reported back to a plenary session where the outlines for the stories were discussed and eventually agreed. The notes from the workshop are available as a separate document - Appendix D.

- 3.17 Two scenarios were then drafted by John McTernan and circulated to the Steering Group and a half-day “wind tunnelling” workshop was held where the scenarios were tested for:
- Plausibility – are the stories believable?
  - Internal consistency – can you see the path of events leading from the past to the present to the future?
  - Surprise/challenge – is there an element of shock, is it challenging?
  - Relevance – are they relevant to the ECR and also to the stakeholders?
  - Gestalt – are the scenarios complete? Do they cover all the important issues facing ECR over the next 20 years?
- 3.18 The scenarios were redrafted to incorporate and reflect the outcome of the workshop redistributed and a further expanded “wind tunnelling” workshop was held, this time attended by Steering Group, Advisory Committee and experts from the Issues workshops. A similar exercise was undertaken and the scenarios again redrafted and circulated for approval by all those participants attending wind tunnelling workshops, as well as those unable to attend from the Steering Group and Advisory Panel. Further testing was undertaken with other significant stakeholder groups, including the Scottish Executive Senior Management Team.
- 3.19 The agreed final scenarios are those that are presented at the start of this report.

**FIGURE 2 - ISSUES IMPORTANCE/UNCERTAINTY MATRIX**



NOTE: This matrix was developed by the project Steering Group, it identifies those 10 most important issues facing the ECR over the next 20 Years, ranked first by order of importance and then by uncertainty of outcome. The Group's decisions were based on the interviews workbook/summaries and 'Feedback' workshop.

The purpose of this part of the process is to identify those few most important and uncertain issues (i.e. top right quadrant) which a) need more exploration/understanding in terms of how they might evolve over the next 20 years and b) which will form the central themes of the scenarios.

## 4 SCENARIO FRAMEWORKS

- 4.1 The issues and themes described in the resultant scenarios were checked against the workbooks and workshop notes to ensure that the stories captured the most important issues facing the ECR over the next 20 years.
- 4.2 These scenarios trace two possible futures for the ECR between now and 2020. “Capital Gains” shows how the city could become the Capital of Northern Europe; “Capital Punishment” illustrates how a long-run genteel decline would impact on the city and its hinterland.
- 4.3 The approach to building these two scenarios was first to identify a series of “fundamentals” or “givens”. These are issues and/or trends that will happen in any event. These fundamentals raise a range of high order strategic choices that need to be made. From the choices made flow a series of consequences. The route from fundamental assumptions through choices to consequences underpins the scenarios that emerged from the process. The following section highlights the key issues in each scenario.

### Themes

#### Capital Gains

- Boom in the financial sector and success in education, biotechnology, tourism and SME’s
- Population growth over 20 years to +1 million in Greater Edinburgh
- De-congestion on roads, modern, cheap, efficient public transport throughout ECR
- Desirable quality of life
- Political change of partisan attitudes
- Women in leadership (networking style)
- New inclusive political networked alliances
- Common bold vision for the ECR and Central Belt
- Great pride throughout the Capital
- Big events (European Championship jointly Glasgow, etc)
- Feel good factor
- City heavily involved in EU and key economic sectors of Europe
- Immigrants welcomed

#### Capital Punishment

- Cushioned decline of City (“boiled frog” syndrome)
- Deteriorating quality of life – expensive housing, poor education, etc.
- Conservative views (“Edinburgh’s big enough thank you”)
- Grid lock and poor public transport
- Housing – high prices and lack of social housing drive out social mix
- Disjointed and timid vision
- Infrastructure decay (including historic – loss of World Heritage site status)
- Business detached from the City
- Government spending in the West of Scotland to cost of Edinburgh
- Exodus of Head Offices
- Feel bad factor

## **Fundamentals/Assumptions**

4.4 Underlying both scenarios are some shared assumptions. It is taken as given that certain key trends will inevitably continue:

- demographic pressures continue to push Scotland's population downwards: an ageing population is matched by a significant decline in the number of young workers;
- social changes already evident become overwhelming in their impact: the continued feminisation of the labour market sees women reaching and retaining a proportionate number of the most senior positions;
- financial pressures on public services grow as the good years of the early 2000s are followed by a far tighter financial regime; and
- globalisation proceeds apace: both China and the Indian sub-continent continue to grow and just as manufacturing industries relocated in the late 20<sup>th</sup> century so service industries start to move in the late 2000's.

4.5 Growth industries for the future:

- banking
- biotechnology
- education: secondary, further and higher
- environment
- energy: particularly from renewable sources

## **Choices**

4.6 There are a series of critical choices to be made over the next two decades. Each choice on its own leads to differing paths - cumulatively they lead to starkly distinctive futures:

- Transport infrastructure: introduction of a modern transport infrastructure based on model of a European city; if not, roads – the economic arteries of the city – continue to clog up
- public-private engagement: a success for congestion charging would lead to greater and more imaginative public private engagement – wider than traditional PPP/PFI; gridlock on the roads would be followed by civic disengagement by the broader business community

- leadership: deeper public-private engagement enriches the city and the region's leadership; or, in contrast business disengagement leaves the city's political leadership isolated
- networks: new networked leadership emerges from business, political and community organisations to sustain a growing city region; or every interest group looks after itself with the common weal being ignored
- voice for ECR: a sophisticated, networked leadership creates for ECR one vision supported by many voices; or because the ECR's voices are divided the interests of the capital are ignored by the Executive
- immigration: ECR's leadership successfully argues for immigration to refresh the capital's and its surrounds labour market and business communities; or labour supply dries up as ECR's traffic snarls up and journey times increase.

### **Consequences**

4.7 The two futures can be characterised as a series of oppositions:

- growth v. stagnation
- resilience v. fragility
- diversity v. homogeneity
- dynamism v. decay.

## **5 CONCLUSIONS/NEXT STEPS**

5.1 The purpose of developing these scenarios is to:

- Form the basis on which to build a common, aspirational vision for the future of the ECR
- to understand the thoughts of a broad cross section of society about the future of ECR and to engage them in the ownership of the scenarios and ultimately the vision
- to develop challenging scenarios against which The City of Edinburgh Council, its partners and all other public and private bodies can test and modify their policies and strategies.

5.2 Included in the process, to varying degrees of commitment, have been approximately 150 people from all walks of life. The majority have enjoyed their involvement, have found it challenging and are interested in being further involved. As well, it has also nurtured rapport between The City of Edinburgh Council and a broad spectrum of business leaders.

5.3 In publishing these scenarios the project sponsors are launching a consultation about the future of the ECR. The exercise to date has been as inclusive as is possible within the constraints of time and money. The project team has spoken to some of the most influential people not only in Edinburgh but also in Scotland, including politicians, business leaders, journalists, entrepreneurs and civil servants. We are confident that the scenarios capture the range of issues the city region will have to face up to and we now want to test that and to hear your views.

5.4 Our intention is to host a conference in association with The Centre for Scottish Public Policy in spring 2004. The conference will focus on the ECR in the 21st Century. In addition to presenting the result of the scenario planning consultation we would invite leading academics, politicians, consultants and practitioners to provide comment and insight. Thereafter we intend to develop a shared vision for the ECR in the 21st century that will shape and inform the strategy and actions of all those responsible for and with an interest in the region's future prosperity.

## **PARTICIPANTS AND ACKNOWLEDGEMENTS**

The City of Edinburgh Council and the University of St Andrews would like to thank all those who participated in this scenario exercise and, who in many cases, gave a considerable amount of their valuable time without recompense. In particular:

**John McTernan** for the extraordinary amount of effort he gave to writing the scenarios.

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In addition we would like to especially thank **Andrew Holmes**, The City of Edinburgh Council's City Development for chairing the steering group, sponsoring and overseeing the success of this project as well as for his considerable input.

To **Garry Sturgeon and Suzanne Lockhart** of the City of Edinburgh Council's City Development Department and their team, Susan Garvie and Paul Smith who participated in the data collection and conducted most of the administration.

Finally, to members of the University of St. Andrews team, particularly **Professor Peter McKiernan and John Randall**, the post graduate students led by Gary Bowman and Joanne Davies who conducted the desk research; Chris Carter, Brad Mackay, and Rachel Doern who also participated in the data collection; Professor Peter Grinyer who analysed the data and Swapnesh Masrani who provided administrative back-up.

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PDF copies of this report and the shorter consultation document are available in the links and research section of [www.edinburgh.gov.uk/capitalreview](http://www.edinburgh.gov.uk/capitalreview)

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Fred	Goodwin	Group Chief Executive	The Royal Bank of Scotland
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Richard	Griffith	Director	Edinburgh World Heritage Trust
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Lucy	O'Carroll	Head of UK Macroeconomics	The Royal Bank of Scotland Group
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Terry	Smith	Property Director	Forth Ports plc

Tim	Steward	Chairman	Federation of Small Businesses
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