



Smarter + Fairer

Tay Cities Region Deal ANNUAL PERFORMANCE REPORT

1 October 2024 - 30 September 2025



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Riaghaltas na h-Alba

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The Tay Cities Region Deal enters Year 6 and successfully draws down £156.6m of funding from the Scottish and UK Governments.



Introduction

An Introduction from the 2025 and 2026 Chairs of the Joint Committee



Cllr Flynn
Dundee City Council
(Joint Committee Vice Chair
2024 and Chair 2025)



Cllr Meechan
Angus Council
(Joint Committee Vice Chair
2025 and Chair 2026)

The Tay Cities Region Deal (TCRD) continues to demonstrate successful partnerships between the UK and Scottish Governments, Angus, Dundee, Fife and Perth & Kinross councils, the Higher and Further Education sector, business sector, third sector, Tactran, VisitScotland, Scottish Enterprise and Skills Development Scotland.

Signed in December 2020, the TCRD includes capital funding of £150m from the UK Government, and £150m from Scottish Government, with a programme that intends to leverage an additional £400m, leading to a total investment of £700m within the region.

Now in its sixth year the Deal has enabled investment of £156m of the approved funding, leveraged a further £253m of external Investment and supported 5,307 jobs. In the past 12 months significant progress towards the delivery of projects has been made including some key milestones being reached.

First Minister John Swinney and Secretary of State Ian Murray opened the James Hutton Institute Advanced Plant Growth Centre in October 2024, creating world-leading plant science and delivering innovative solutions for food and environmental sustainability.

In March 2025, celebrating its first anniversary, Perth Museum was one of five finalists for the

world's largest museum prize, the Art Fund Museum of the Year.

Just a month later construction was completed on the Growing the Tay Cities Biomedical Cluster project, which will allow high-growth companies to deliver the therapeutics, diagnostics and healthcare innovations of tomorrow, at the same time as increasing industry partnership.

In May 2025 Hospitalfield participated in the popular and prestigious RHS Chelsea Flower Show. The Arts Garden was awarded a Silver Gilt medal, with plans to celebrate its legacy and core focus in hand to ensure that the garden has a final and permanent resting place at Ladyloan School, Arbroath, where it can be looked after and enjoyed.

The TCRD is currently undertaking a reshaping exercise, with the approach presented and agreed to Joint Committee in March 2025. Assurance is being sought on all Fund, Programmes and Projects within the Deal Programme that they can still deliver to the Deal Commitments that they entered into Deal with. This work will enable the Partnership to be in the best position, both for future economic investment funding opportunities and to continue to effectively deliver the remainder of the Deal Programme.



Executive Summary



Up to the end of September 2025, **£231.69m** of funding has been approved for investment by the Tay Cities Region Joint Committee.



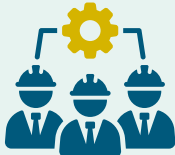
£156.443m of Government investment released.



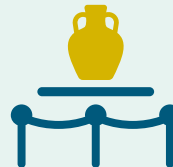
The Tay Cities Region Deal **enters Year 6** and has **claimed over half of £300m** funding allocated.



£253m leverage has been secured by Projects within the Deal. This equates to **63% of the overall leverage commitment** of the Deal.



Growing Tay Cities Biomedical Cluster Project now complete.



Perth Museum celebrated the 1st year and was one of five finalists for Art Fund Museum of the Year 2025, the worlds largest museum prize.



The Tay Cities Partnership started a **Reshaping exercise** to ensure the effective delivery of the Deal Programme for the remaining 5 years.



The James Hutton Institute has First Minister John Swinney and Secretary of State Ian Murray officially open the **Advanced Plant Growth Centre**.



£344.3 million in current **Gross Value Added (GVA)** generated for the region through Deal investment to date.



5,307 jobs created by Projects since Deal Signing. This equates to **88%** of the overall job commitment of the Deal.

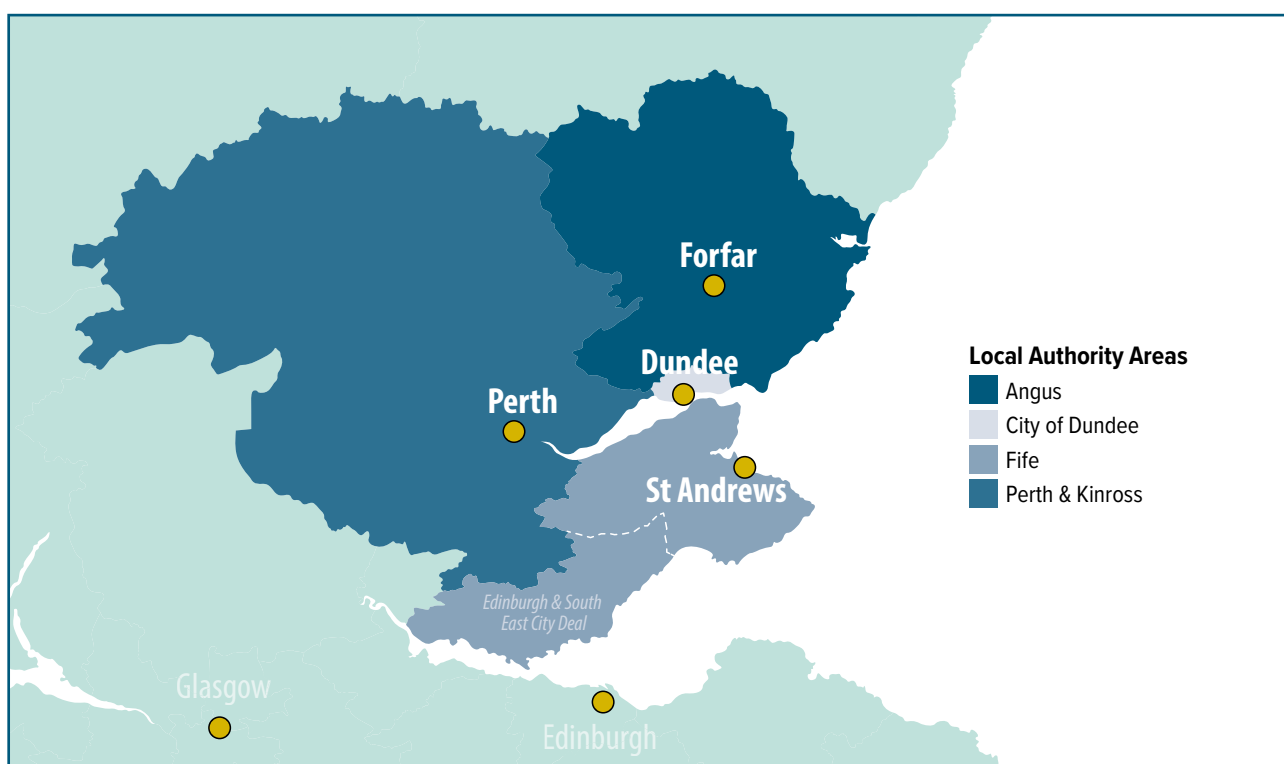


The Joint Committee is supported by a number of bodies which are summarised in the governance chart diagram on the Tay Cities Region Deal website². More information on the governance structure and the Deal can be found in the Deal Document.

Geographical Overview

The map below shows the geographical area of the four Local Authorities within the Deal: Angus, Dundee City, Fife and Perth & Kinross. Only North-East Fife is included within the Deal, with the remainder of Fife within the Edinburgh and South-East City Region Deal.

Diagram 1



National PMO Networking Group

The Tay Cities Region Project Management Office (PMO) continues to lead and provide the secretariat for a National PMO Networking Group, which includes representation from Regional and Growth Deals from across the UK. The group aims to share best practice and exchange guidance, use the platform for presentations from various organisations, and utilise the knowledge of its members to start sub-groups specific to enhancing City Region and Growth Deals.

² www.taycities.co.uk/sites/default/files/2024-10/TCRD%20Governance%20Structure_2.pdf



There have been a number of short and longer-life sub-groups established to date including the:

- Decarbonisation sub-group
- Benefits Realisation sub-group
- Subsidy Control sub-group
- Finance sub-group.

The wider network and various sub-groups are a valuable source of information and present an opportunity to share knowledge and expertise. The Tay Cities PMO is presented as an exemplar by Governments for the sharing of best practice to other City Region and Growth Deals.

The PMO Network has regular engagement with both Governments, other organisations and regional opportunities including:

- Green Book Training with the HM Treasury in July 2025. To date, the PMO have worked with UKG to deliver HM Treasury Green Book training to 857 people involved in City Region and Growth Deals in Scotland.



The Deal is comprised of 1 Fund, 3 Programmes and 38 Projects. Within the Programmes and Fund, there will be additional Projects emerging as the Deal progresses.



The Deal

This section of the Annual Performance Report summarises the Projects that have entered into the implementation or delivery stage following full Government and Joint Committee approval, up to and including September 2025. The Projects are categorised by Tay Cities Region Deal themes and are aligned to the Implementation Plan, with any updates to milestones and risks highlighted.

Status of Fund, Programmes and Projects

The Deal is currently comprised of 1 Fund, 3 Programmes and 38 Projects. Within the Programmes and Fund, there will be additional Projects emerging as the Deal progresses. Table 1 below shows an overview of the status of the Programmes, Fund and Projects up to the end of September 2025.

Table 1: Status of Funds, Programmes and Projects up to end of September 2024

Programme/Project		Location	Stage
An Empowered & Inclusive Tay			
Regional Skills & Employability Development Programme	Regional Skills & Employability Development Programme ³	Regional	Implement (Phase 1)/ Define (Phase 2)
	Skills Programme Manager	Regional	Implement
	Digital Skills (Phase 1)	Regional	Implement
	Life Sciences Biotechnology and Medical Technology: Growing the Tayside Biotech, Biomedical and Agritech	Regional	Implement
	Supporting SME Skills	Regional	Implement
	Digital Skills (Phase 2)	Regional	Define
	Hospitality Skills	Regional	Define
	Sustainable Construction Skills	Regional	Implement
	Tay Cities Engineering Partnership	Regional	Implement
	Aviation Academy for Scotland	Regional	Define
An Innovative, International Tay			
	Growing the Tay Cities Biomedical Cluster	Dundee	Deliver
	International Barley Hub	Perth & Kinross	Deliver
	Advanced Plant Growth Centre	Perth & Kinross	Deliver

³ There are a number of Phase 2 Regional Skills and Employability Development Programme Projects to be defined and delivered. These will be included in future Annual Performance Report updates, as and when they are agreed by Governments and the Partnership.



	Programme/Project	Location	Stage
Angus Fund	Angus Fund	Angus	Implement
	CASI Programme	Angus	Define
	Mercury Drone Port	Angus	Implement
	Angus Rural Mobility Hub	Angus	Define
	Zero Four	Angus	Define
	Low Carbon Housing	Angus	Define
	Connecting Montrose	Angus	Define
Regional Culture & Tourism Investment	cyberQuarter	Dundee	Implement
	Just Tech	Dundee	Define
	Perth Innovation Highway	Perth & Kinross	Define
	Studio Dundee	Dundee	Define
	Advanced Manufacturing Programme	Regional	Define
	Eden Campus	Fife	Implement
	Stretch Dome Simulator	Fife	Deliver
	Project Beacon	Perth & Kinross	Define
Regional Culture & Tourism Investment	Regional Culture & Tourism Investment Programme ⁴	Regional	Implement (Phase 1)/ Define (Phase 2)
	Hospitalfield	Angus	Implement
	Discovery Point Transformed	Dundee	Implement
	Pitlochry Festival Theatre	Perth & Kinross	Deliver
	Perth Museum	Perth & Kinross	Deliver
Regional Culture & Tourism Investment	Innerpeffray Library	Perth & Kinross	Define
	Crieff International Highland Centre	Perth & Kinross	Define
	Aero Space Kinross ⁵	Perth & Kinross	Implement

A Connected Tay			
	Rural Angus and Rural Perth & Kinross Highspeed Broadband	Angus and Perth & Kinross	Deliver
	5G Digital Testbeds	Regional	Implement
	Broxden Low Carbon Travel Hubs	Perth & Kinross	Implement
	Perth Active Travel Hub	Perth & Kinross	Define
	Hydrogen Refuelling Station	Perth & Kinross	Define

⁴ There are a number of Phase 2 Regional Skills and Employability Development Programme Projects to be defined and delivered. These will be included in future Annual Performance Report updates, as and when they are agreed by Governments and the Partnership.

⁵ Aerospace Kinross currently has Joint Committee approval subject to conditions and is still in the feasibility stage. When the Project is in a position to proceed to delivery it will be added to a future Annual Performance Report.



Programme/Project	Location	Stage
Dundee Airport Investment revenue	Dundee	Implement
Dundee Airport Investment capital		Define
Perth Bus & Rail Interchange	Perth & Kinross	Define

Stage No.	Definition
1. Define	Business case being developed, and not yet approved by Joint Committee.
2. Implement	Business case has been approved by Joint Committee, and is being implemented. In a capital Project, this may be construction; for skills Projects this may be establishing/delivering a course.
3. Deliver	Project is in place and monitoring and evaluation is in framework to assess if it is achieving its objectives.
4. Legacy	Project has resulted in mainstreaming or improvements to business as usual (impact) that is generated beyond the funded period.

Project Progress

The following information provides a snapshot of progress throughout the year and are shown by Tay Cities Region Deal theme, for the Programmes, Fund and Projects in delivery.

This includes a description of the Programme, Fund and Projects, headline achievements, and where appropriate, upcoming milestones and a case study. The summaries also set out the funding awarded to each.

The Projects which have recieved Full Business Case approval from Joint Committee since October 2024 are listed below and have been added to this years Annual Performance Report update:

- Sustainable Construction Skills - Regional Skills and Employability Development Programme.





Regional Skills & Employability Programme

Programme Owner: Perth & Kinross Council

Enabling the region to...: Empower & Promote Inclusion

Thematic Board: Skills



Programme Description & Headline Achievements

The Regional Skills & Employability Development Programme sets out the Partnership’s proposition to bring about the changes in skills and employability services that will support the vision of the skills and employability landscape in the region, and make a positive, tangible difference to our citizens, businesses and other stakeholders. The Programme is making incremental changes to improve the complex regional employability and skills landscape to deliver better outcomes for all.

Up to £20m of Scottish Government investment has been allocated to help develop a new collaborative, pan-regional approach and put necessary interventions in place to drive improved economic performance and inclusion across the region. To date, the investment is helping to drive up skill levels and productivity across the region through developing employment, training, and skills development opportunities.

Since September 2024, the Programme has had its own SharePoint site for project owners to upload claims and project data, ensuring better version control and audit trails. This data will feed into Power BI, enabling the display of individual project and overall Programme performance. The programme also now has a monthly newsletter to showcase programme successes and updates.



The Programme has four approved Phase 1 Projects and one approved Phase 2 Project. A further four Phase 2 Projects are to be developed. The approved Phase 2 Project is Sustainable Construction Skills which received Joint Committee approval in June 2025.

Key Milestones & Progress

In order to achieve the aims for the Programme, the next milestones to support its delivery and their status are set out below:

Milestone	Due Date
Approval and start of second tranche of Projects. Content and outcomes to be defined in project 2025/2026 business cases	2025/2026
Assessment, review and evaluation of projects to ensure they flexibly respond to emerging 2025/2026 labour market needs within the City Deal region and deliver specific project aims and objectives detailed within project business cases	2025/2026

Key Risks

Risk	Mitigation
There is a risk for the Skills Programme in relation to the profile. Due to the level of underspend in years 1-6, the Scottish Government will need to agree allocations on an annual basis. The Government is committed to the £20m for the Programme, however, is unable to guarantee when the money will be made available and Projects may need to spend and only recoup funding in year 10	Programme Manager and Project Owners to be aware of the risk. Partnership will work with the Scottish Government to mitigate the risk



£516k



Skills Programme Manager

Programme Owner: Perth & Kinross Council

Enabling the region to...: Empower & Promote Inclusion

Thematic Board: Skills



★ ACHIEVEMENTS

To date, the Skills Programme Manager has:

- released £184k of Government funding; and
- created 1 new job.

Programme Description & Headline Achievements

The Skills Programme Manager Post supports the Regional Skills and Employability Development Programme. The Skills Programme Manager drives the strategic agenda and ensures delivery activity remains consistent with the overall Programme business case, the strategic context of the Deal and with the ambitions of partners, stakeholders, and citizens.

An important aspect of the role has been building consensus and collaboration across the region’s four local authorities and other relevant stakeholders such as the Higher Education and Further Education sector and local employers on the future direction and focus of regional skills activity, ensuring this effectively compliments and enhances existing local and national Programmes. This is supported through building relationships with key partners with regular communication.

The Skills Programme Manager is working closely with the Skills Advisory Board and other partners to develop the Regional Skills and Employability Development Programme OBC refresh.



Key Risks

Risk	Mitigation
<p>Programme Manager is leaving post and there is a risk of there being an impact on the management and coordination of the Programme</p>	<p>Programme Owner is carrying out recruitment process</p>

CASE STUDY

The Skills Programme Manager is currently supporting the Skills Advisory Board in developing a new Regional Skills Action Plan, which will replace the 2019 Regional Skills Investment Plan. This refreshed strategy is aligned with the Regional Economic Prospectus introduced last year.

The development process has included a series of workshops with key stakeholders and the Tay Cities Regional Deal Thematic Boards. The resulting plan outlines the region’s skills priorities for the next three years, structured around three core missions:

- Skills for Future Growth
- Job Entry and Progression
- Securing the Future Workforce

The final document, scheduled for publication towards the end of 2025, will also feature an implementation plan and a comprehensive monitoring framework to track progress and impact.



CASE STUDY

Launched to tackle the growing demand for digital talent in the Tay Cities Region, Phase 1 of the Digital Skills Project was successfully completed in September 2025 supporting 896 individuals to upskill or reskill in Data, Software Development and Cyber Security. At the heart of DigiTay's mission is diversity, equality, and inclusion. The project has invested in initiatives that support underrepresented groups (women, people with disabilities and people from BME backgrounds) access digital skills. Examples include:

Archaeology Scotland: providing 11 women from migrant, asylum-seeking, and refugee backgrounds in Dundee with a unique opportunity to develop digital and data skills. They employed digital surveying techniques, 3D modelling, and GIS mapping to record and analyse historical sites, while training in Power BI enhanced their data analysis capabilities. This initiative not only upskilled learners but also fostered confidence in digital tools, broadening their educational and career prospects.

Code Division's 'Empowering Neurodiverse Women in Data Science': enrolled 16 neurodiverse women in the Tay Cities Region. Participants worked towards SQA-accredited Data Science units at Level 8, building a portfolio of projects that showcase their expertise. Designed in collaboration with neurodiverse experts, the holistic programme ensured an inclusive learning experience. A showcase event connected learners with potential employers, reinforcing pathways to employment and helping to bridge the local digital skills gap.

The Data Lab Scotland: DigiTay has expanded the reach of the Data Skills for Work programme across the Tay Cities Region, benefiting over 200 learners between 2023 - 2025. Key subjects included Machine Learning, Data Analysis, Data Literacy, Project Design and Appraisal, Data Engineering, and AI & Automation, skills that are increasingly essential in today's digital first economy. Courses are specifically designed to benefit women, neurodivergent individuals, those from lower SMID areas, and people who are unemployed or underemployed, ensuring inclusive access to opportunity and skills development.



Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below:

Milestone	Due Date
Procurement for 2025/26 between partner colleges	March 2026
Development of online HNC courses	March 2026

Key Risks

Risk	Mitigation
Lower than expected student uptake in newly developed courses. This results in missed revenue opportunities for the colleges; and for industry, an undersupply of skilled entrants into the labour force. Sector growth may be inhibited, or companies will look out with the Tay Cities Region	The partner colleges will promote the new courses and training opportunities. There will be regular engagement with local schools (primary and secondary), host annual events, and engage in programmes at the Dundee Science Centre to promote their courses and careers within the sectors. The project will also engage with local companies to promote in-work courses and training
Forecast industry growth and demand for labour is lower than expected. The Tay Cities Region will absorb the cost of training and upskilling but full economic benefits will not be realised or will leak out of the Tay Cities Region economy	There will be regular engagement with industry partners (through the Curriculum Development Steering group and project manager) to assess the current and future demand for skilled workers. As this is a 7-year project it is expected that demand will evolve over time and the project will respond to these changes

CASE STUDY

As part of the Science Futures project, two targeted training courses were developed to upskill individuals working or studying in the science sector across Tayside. The Essential Laboratory Skills course ran over three days and welcomed 10 registered students. Participants gained hands-on experience in core lab techniques, including pipetting, solution preparation, aseptic techniques, experimental design, PCR, and gel electrophoresis. The course also covered key industry practices such as traceability and auditing. Two attendees shared their experience:

“As a top-up learner who has not had any recent lab experience, it was very helpful at building back confidence in basic lab skills.”

“It is extremely rare to be given the opportunity to do lab skills training and therefore this is a wonderful opportunity for all levels of interest. Thank you for keeping the teaching relevant to current industry.”

The Good Manufacturing Practice (GMP) course was delivered as a one-day session to 14 participants. It introduced GMP principles, compliance strategies, and how to apply GMP throughout their careers. Attendees came from a range of institutions, including Dundee and Angus College, NHS, Abertay University, University of Dundee, and senior phase school pupils.



Key Risks

Risk	Mitigation
Project does not meet the needs of the business base	Engagement from key partners and options workshop to agree the scope. Ongoing engagement with the business base via established relationship and channels to inform project design



CASE STUDY

The Supporting SME Skills Project have the ability to tailor make a course for individual SMEs in receipt of funding. One example of this has been their support of the Balgillo Nurseries.

Since opening in 2008, the Balgillo Nurseries have grown into a well established childcare provider with four nurseries. The owners recognised a gap in soft skills across the team, particularly in communication. Staff needed support with confidence, eye contact and managing difficult conversations.

Through Skills Development Scotland, they were introduced to Dundee and Angus College. The Tay Cities SME Skills Fund offered a cost-effective way to provide structured training.

The Project team then worked on designing a bespoke customer service programme covering nursery-specific customer service, conflict management, and communication for a supporting workplace.

The training was delivered online and in person. Staff became more confident, teamwork improved and relationships with parents strengthened.



£1.98m



Sustainable Construction Skills

Project Owner: Dundee & Angus College

Enabling the region to...: Empower & Promote Inclusion

Thematic Board: Skills



Project Description & Headline Achievements

The Sustainable Construction Skills Project has been awarded up to £1.98m of Scottish Government investment. The Project received Full Business Case approval from the Joint Committee in June 2025.

The Sustainable Construction Skills project will address the skills and labour gaps resulting from the Scottish Government’s commitment to reach Net Zero standards by 2045. It will address the gaps by focusing on developing new and enhancing existing training and qualifications to create new learning and career pathways. The Project will also upskill the existing workforce, reskill career changers and unemployed, and train new entrants in the construction sector.

The project will cover professional, technical and trades/craft construction skills related to Decarbonisation of Buildings (domestic and commercial), Energy Efficiency and planning for sustainable towns and building.

Milestones and achievements will be reported in the following TCRD Annual Performance Report in March 2027.



Milestone	Due Date
Mobile Engineering Technology Unit Purchased	2024/25
Mobile Engineering Technology Unit Commissioned and Tested	2024/25

Key Risks

Risk	Mitigation
Operation of the TCEP Mobile Unit beyond March 2026 due to previous underspend	The Project will seek sponsorship from local businesses and organisations
Resource within partner organisations affected by sector budget cuts	TCEP manager reviewing options to use associate trainers for delivery where teams have been through restructuring exercises and resources reduced since FBC approval



- Increase the translation and application of this research around the globe;
- Support a “Barley Cluster” of related processing, innovation and product interests; and
- Develop a supporting skills and knowledge programme.

The International Barley Hub has been developed in parallel with the Advanced Plant Growth Centre. For more news and updates, please visit the International Barley Hub website International Barley Hub.

Key Risks

Risk	Mitigation
Construction inflation is higher resulting in a funding gap	The extent of the potential funding gap is lessening as various actions crystallise positively

CASE STUDY

Following on from its official Ministerial opening last year, the IBH continues to reshape the future of barley and redefine how science, industry and communities work together to tackle climate resilience, crop security and deliver real economic impact.

The IBH’s work was featured in a new economic impact assessment report from BiGGAR Economics which showed that around £31.7m of the value of the UK barley crop can be attributed to the Hutton. In addition, its contribution to barley development and industry resilience was estimated to have helped safeguard approximately £269.9 million in whisky sales in 2024, £136.6 million in GVA and supported 435 jobs across the UK.

TCRD investment also leveraged around £3.2 million worth of new funding from UKRI, EU Horizon Europe; Scottish Enterprise; Novo Nordisk, our BARIToNE (barley PhD programme) and Limagrain for barley research.

Scientists had their work published in the globally respected science publications including Nature and Nature Genetics; offering major breakthroughs in genomics that will help in the development of varieties that can support the long-term sustainability of barley production underpinning key value chains.

Wide-ranging stakeholder engagement saw the IBH taking part in Cereals, the UK’s leading arable sector event; presenting a cereals walk at Balruddery Farm near Invergowrie to showcase over 5000 plots; and the hosting of visits from Scottish Parliament Cross Party Groups and conferences of key international networks including Rhizosphere 6 and Barley Genome Net.

There was a strong media presence throughout the year on TV, radio, in print and online in local, national and international outlets highlighting the latest research breakthroughs as well as new appointees in the IBH team with Dr Tim George as new Director and Isabelle Colas, Kelly Houston and Sarah McKim as Deputy Directors.



- Next-generation controlled environments which can simulate any current or future environment anywhere in the world (for example, increased greenhouse gases) to test the effect on crops
In the last year, key partners in the National Alternative Protein Innovation Centre network was awarded £38m to enable translation of disruptive technologies and approaches in alternative proteins (APs).
- Additionally, the Project has continued engagement with stakeholders, with seminar series on vertical farming design, AI, genomics, plant breeding, food sustainability etc and in person events, including Controlled Environment Agriculture 4.0, Future Food-Tech 2024, and Phenome UK Conferences.

Key Risks

Risk	Mitigation
Construction inflation is higher resulting in a funding gap	The extent of the potential funding gap is lessening as various actions crystallise positively

CASE STUDY

The Advanced Plant Growth Centre - APGC - progressed into a new phase of innovation and impact development; and the opening of the new Crop Innovation Centre within which the APGC and IBH state-of-the-art laboratories are hosted, accelerated this. Furthermore, this was supported by the appointment of Dr Rob Hancock, a plant biochemist, as APGC Deputy Director.

Engagement with stakeholders, particularly industry, was active with a seminar series covering topics such as vertical farming design, AI, genomics, plant breeding, food sustainability etc as well as in person events to groups such as the Tay Cities Clean Growth, Scottish Alliance for Food, and the charring and key note talks at conferences such as Controlled Environment Agriculture 4.0, Future Food-Tech 2024, Phenome UK etc.

A significant step to impact over the reporting period was the award, with partners at Imperial College and the Universities of Leeds and Sheffield; of the National Alternative Protein Innovation Centre (NAPIC). NAPIC is supported by the Biotechnology and Biological Sciences Research Council, Innovate UK and Industry. With £38M support, NAPIC is building a dynamic, stakeholder co-created nexus of innovators to enable translation of disruptive technologies and approaches in alternative proteins (APs) and leverage the UK’s world-leading science base to catapult national industrial strengths to economic growth in a sector projected to be worth £6.8Bn and the potential for 25000 new jobs by 2030. Crucially, plant-based protein is a key driver in the alternative protein space and so the APGC is a driving force in NAPIC.



£26.5m



Angus Fund

Fund Owner: Angus Council

Enabling the region to...: Innovate & Internationalise

Thematic Board: Innovative, International



Fund Description & Headline Achievements

The UK Government will commit up to £26.5m to the Angus Fund. The Angus Fund will help achieve an investment balance across the region by investing in Projects across Angus to be developed collaboratively with Angus Council and other local partners as part of the Deal. The purpose is to increase productivity through clean growth, protecting places for future generations to live, work, and visit. The Angus Fund will contribute to the development and implementation of innovative, clean technologies, which will also significantly reduce the region’s carbon footprint, contributing to national reductions in carbon use.

To deliver this purpose, the Fund will support three connected components, namely:

- Clean growth;
- Low carbon; and,
- Agricultural technology.

The investment has been provisionally divided between six Projects to support these themes, including:

- Mercury Drone Ports
- Angus Rural Mobility Hub



- CASI Innovation Farm
- CASI AgriTech
- Connecting Montrose
- Low Carbon Demonstrator Housing

The Angus Fund will be used to stimulate The Mercury Programme, which is Angus Council’s visionary £1 billion partnership programme between government, public, private and community sectors. Individual Project business cases will be developed for each of the Projects that comprise the Angus Fund.

Key Milestones & Progress

As the Angus Fund has Full Business Case approval, any milestones for Projects within the Angus Fund will be included in the individual Project entries.

Key Risks

Risk	Mitigation
The selected projects for funding fail to develop a robust business case	Projects will be supported by Angus Council and SE to develop robust business cases
Businesses fail to engage	Regular engagement to ensure projects developed in a transparent and inclusive way
Brexit impact	Impacts of Brexit will continue to be identified as the Business Cases are developed
Projects are unable to achieve match funding	Working to explore external funding options and managing expectations to ensure additional courses of funding are identified and pursued where appropriate





Mercury Drone Ports

Project Owner: Angus Council

Enabling the region to...: Innovate & Internationalise

Thematic Board: Innovative, International



★ **ACHIEVEMENTS**

To date, Mercury Drone Ports has:

- released £505k of Government funding.

Project Description & Headline Achievements

Mercury Drone Ports, part of the Angus Fund, has been awarded up to £1m of UK Government investment. The Project will create Scotland's first Drone Port and drone delivery network, establishing Angus as an international centre for the development of drone technologies and logistics both onshore and offshore.

The Mercury Drone Ports Project supports the adoption of safer, sustainable, green and more cost-effective alternatives to both commercial and public sector activities through drone operations. The Project's primary focus is the development of drone-based technologies and their application within the environments and industries found on and offshore Angus. Operations can include deliveries, long-range inspection/survey missions and autonomous asset surveillance for the following industries:

- Offshore wind
- Offshore oil and gas
- Ports and Maritime
- Agriculture
- Rural public services



The Project has undertaken a feasibility and options study to review the optimal location for the Drone Port in Montrose, as well as identifying airspace infrastructure requirements. Additionally a high level Concept of Operation has been produced, detailing an effective way of delivering the activity at the Drone Port.

Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below:.

Milestone	Due Date
Securing the Land for the Drone port	October 2025
Procure Concessionaire Contract	December 2025

Key Risks

Risk	Mitigation
Lack of commercial viability – demand for drones’ low in Angus	Concessionaires will be required to carry out market engagement to establish use cases and commercial uses for the drone port
Securing a supplier who wants to operate the Project and agreeing to contractual arrangements.	Suppliers interested in operating the Drone port. Support will be given from commercial advisor if/when appointed
Unable to secure commercial advice due to capacity within the industry for this specialist advice and budget available	Prepare robust project plan with tasks, costs, responsibilities, deadlines and sign Partnership Agreement promptly. Seek Committee approval at earliest opportunity



- Two students secured part-time developer roles via connections made at the Dundee Script Meet-up, a monthly tech event hosted at Abertay cyberQuarter.
- The Scottish Government launched a free cyber resilience training module for all university and college students in Scotland during the inaugural Abertay Cyber Student Showcase.
- Hosted over 80 public sector leaders in partnership with NHS NSS for hands-on workshops, tours, and expert-led sessions to strengthen healthcare cybersecurity collaboration.
- Hosted the annual 9/12 Strategy Challenge, bringing together students from universities and colleges across Scotland to simulate national cyber crisis response.

Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below.

Milestone	Due Date
Delivery of Pump Priming Fund	2025+

CASE STUDY

Police Scotland and Abertay cyberQuarter entered into a strategic partnership designed to strengthen efforts to combat cybercrime and improve the country’s cyber resilience.

Under the new partnership, Police Scotland Cybercrime Investigations and Digital Forensics will work with academics, researchers and students on a range of research, outreach and public awareness projects, as well as attending regular meet-up and networking events with a focus on growing the cyber cluster in the Tay Cities Region. The partnership will also promote knowledge sharing between officers and students and staff from Abertay’s Cybersecurity and Computing programmes.

Abertay also received sponsorship for two PhD research scholarships from the Scottish Institute for Policing Research (SIPR), including a project investigating how individuals can determine sophisticated AI-generated visual deepfakes from genuine online media, with the aim of creating training materials to improve detection. The second scholarship will see Abertay students examine the effectiveness of various interviewing techniques through the lens of psychological and sociological research. Police Scotland staff will have access to the Abertay cyberQuarter training space and secure Malware Analysis Lab, in addition to desk space for staff and events facilities.

Assistant Chief Constable (ACC) Stuart Houston, Executive Lead for Organised Crime, Counter Terrorism, and Intelligence, and the Senior Responsible Officer for Cyber Capabilities said: “While we work closely with UK and international law enforcement agencies, we know that partnership working across other sectors, including academia, can further advance our approach to the investigation and detection of cybercrime. Our work with Abertay cyberQuarter will be driven by a newly established Cyber and Fraud Unit, comprising of specialist detectives and staff, that will develop new capabilities and training to tackle emerging digital threats to Scotland.”

Abertay cyberQuarter also signed key partnerships with companies NCR Atleos and Systal Technology Solutions including collaborative research and talent development initiatives.





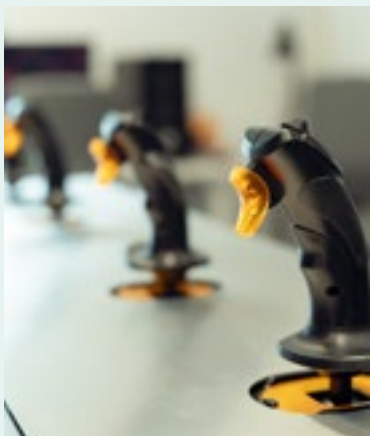
CASE STUDY

Power-To-X: Driving Carbon Reductions and Innovation
Construction of the Power-to-X (P2X) facility has passed the halfway mark, advancing a flagship initiative in sustainable innovation. Designed to produce green hydrogen using renewable energy from the Eden Campus solar farm, the facility directly contributes to regional carbon reduction targets and supports Scotland's net-zero ambitions.

A purpose-built research and development laboratory will anchor the site, enabling collaboration with technology developers in hydrogen and clean energy. The facility's infrastructure – including an electrolyser, hydrogen storage, and refuelling station – will support end-to-end hydrogen production and distribution.

A key upcoming milestone is securing funding for integrated carbon capture systems. These systems will capture live industrial CO₂ emissions from Eden Mill's Distillery and the on-site biomass energy centre, creating a unique demonstration of circular carbon management. Completion is expected in early 2026, with the project already delivering measurable progress toward a low-carbon economy.





CASE STUDY

The D'Arcy Thompson Simulator Centre Limited has continued to grow with development of the sustainaVERSE™ software.

The sustainaVERSE™ platform has progressed from the Tay Cities Deal, Stretch Dome Simulator business case, into a modern, Unreal-Engine-based immersive data-visualisation stack. The move to Unreal Engine enables real-time, GIS-aware visualisation and simulation (e.g., energy and environment scenarios) and aligns with established geospatial pipelines.

This development phase was enabled by St Andrews Innovation (partnering and facilities), Deep Tek Ltd (industry support), and applied projects with University of St Andrews' Estates (integrating visualization energy vectors at its Eden Campus), NHS Fife/Fife Regional Council (envisioning food futures), and the River Eden Sustainability Partnership (controlling invasive species).

Additionally, D'Arcy Thompson's sustainaVERSE™ featured in workshops in Madagascar and Mauritius supported by NiS Africa. These events are progressing implementations in five projects in the region, including photo-voltaic energy, agri-voltaic energy, blue-economy and conservation/restoration.





Regional Culture & Tourism Investment Programme

Programme Owner: Angus & Dundee City Councils

Enabling the region to...: Innovate & Internationalise

Thematic Board: Culture & Tourism



Programme Description & Headline Achievements

The Scottish Government will commit up to £37m to the creation of a Regional Culture and Tourism Investment Programme through the investment in key economic assets in the sector. This is compiled of a £27m investment in a Regional Culture & Tourism Investment Programme and £10m investment in the Pitlochry Festival Theatre project.

The overarching objective of the Programme is to contribute to wider regional ambition to be a highly desirable place to live, work, visit and invest in. It aims to do this by building on and strengthening the region’s existing culture and tourism offering, to deliver a world class region with world class culture and visitor experiences.

The Programme will be managed and delivered collaboratively by a partnership between the four Tay Cities local authorities, Scottish Enterprise, Creative Scotland, Historic Environment Scotland, and VisitScotland, with the support of the Scottish and UK Governments.

Within the Regional Culture & Tourism Investment Programme, 2 Projects were identified for delivery early in the Deal period. These are Hospitalfield and Discovery Point Transformed, which have received Full Business Case approval and are in delivery.



Key Milestones & Progress

In order to achieve the aims for the Programme, the next milestones to support its delivery and their status are set out below.

Milestone	Due Date
Programme Outline Business Case Updated and Approved by the Tay Cities Partnership	2026/27

Key Risks

Risk	Mitigation
Individual Projects are unable to secure match funding due to changes in the funding environment	The assessment criteria will be received after the first tranche of Projects are recommended for approval through the Full Business Case. Including match funding requirements and the current investment position
The investment programme fails to prioritise Projects that help deliver a stronger and more sustainable collaborative approach between the tourism and creative sectors	The prioritisation criteria include scale, significance and transformation capacity for the assessment of individual Projects
The investments fail to deliver inclusive and sustainable growth	The contribution that a Project makes to delivery of accessibility and fair work will be assessment criteria. Each Project’s impact on the built and natural environment will also be assessed



Milestone	Due Date
Design development for Phase 4	2026/2027
Completion of Phase 4	2027/2028

Key Risks

Risk	Mitigation
Fundraising in Phase 4	Ongoing progress with fundraising

CASE STUDY

The development of the new walled garden has received huge coverage and attention over the last two years. It has featured on a number of TV programmes and will be included in a new major publication, Great Gardens of Scotland. The designer of this walled garden, Nigel Dunnett, has become extremely high profile through his activist and design work around horticulture. He is now included in the design team for the Queens Memorial in St James Park, London.

In early 2024 he invited Hospitalfield to make a bid with him to Project Giving Back, which supports the main gardens at Chelsea Flower Festival. The Hospitalfield Arts Garden won the silver gilt medal at Chelsea in May 2025 and the garden was returned, thanks to the considerable funds awarded by Project Giving Back, to Ladyloan Primary School in Arbroath. This is a world class garden of huge interest to many in the horticultural world, sited in one of our newly built primary schools in Arbroath. It will be an aide for teaching and learning in this highly regarded ‘resource’ school that prioritises outside learning.

Our tourism story aligns with the garden currently, however, as we shift the focus towards our heritage and collections, whilst the horticulture programmes continues to be a vital cross cutting theme, we will be able to give greater focus to the wealth of treasures within our collections. There are plans to bring all aspects of Hospitalfield together giving an event balance across the heritage, contemporary art programmes and horticulture.



- Completed a significant roof replacement and insulation upgrades, and the replacement of the glazed curtain walling, significantly increasing the building's thermal efficiency from previously installed low-carbon energy generation.

CASE STUDY

As Pitlochry Festival Theatre's capital redevelopment delivery reached completion in June 2025, the impact of Tay Cities Deal investment is becoming ever more tangible in both employment and local value creation. The enhanced spaces, including the 172-seat Studio, a fully refurbished entry and foyer, replaced thermal envelope, and upgraded Auditorium, public spaces and WC facilities. This project has not only improved the visitor experience but has also generated new, long-term employment.

In FY25, the Theatre created ten new permanent (FTE) roles across the organisation, specifically enabled by the increased commercial activity through the new facilities. This builds on earlier job creation across construction and consultancy phases and has seen the Theatre exceed the employment target committed to at Deal Signing.

Community wealth building has been a guiding principle throughout. The appointment of James F. Stephen Architects based in Glamis leading the design, Elgin-based Robertson Construction North for the thermal envelope works and Dundee-based contractor Bentley's Fit for the final Auditorium and public facilities works, ensured that public funding was reinvested locally. Additional subcontracts were awarded to businesses based in the Tay Cities Region, including MEP, flooring, decorating, and technical equipment specialists. These decisions reflect the Theatre's commitment to local spend, fair work principles, and strengthening regional capacity.

Through this capital delivery, Pitlochry Festival Theatre is embedding long-term economic benefits into the local economy and demonstrating that cultural infrastructure can deliver not only artistic excellence but inclusive, placebased growth.



energy generation from solar carport canopies and a battery storage unit have been deployed to sustainably support the EV charging systems at the site.

Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below.

Milestone	Due Date
Broxden Low Carbon Transport Hub: New Grid Connection	December 2025



CASE STUDY

The Broxden Low Carbon Transport Hub Project aims to tackle one of the largest decarbonisation problems – the transition of fossil fuelled transport to zero emission transport. The Project is helping to decarbonise road transport by providing expanded electric vehicle re-charging facilities at the Broxden Park & Ride site.

Now operational, the Broxden Low Carbon Transport Hub has been able to monitor the usage at the Broxden site. From October 2024 to June 2025, there was a total of 12,337 charging sessions at the new facility. These sessions produced a carbon saving of 471,241 kg and a carbon value of £121,782.

These figures highlight the Project continues to be successful and used at high numbers. With the new grid connection being delivered in December 2025, the Project has started exploring future upgrades to the site.



The Dundee to London point-to-point service is enhanced by other scheduled air routes operating from Dundee as a result of Loganair’s ATR-42 aircraft being based at the airport. Significant online and TV advertising campaigns showcasing the Dundee to London air route by Loganair continue to take place, changing perceptions of the region as place to do business and supporting growth in inbound visitor numbers. Business and leisure customers can now book travel to European and long-haul destinations from Dundee through Loganair codeshare partner websites such as British Airways, Emirates and Qatar Airways and through local, national and online travel agencies.

Key Milestones & Progress

In order to achieve the aims for the Project, the next milestones to support its delivery and their status are set out below and relate to the Project as a whole, capturing both revenue and capital activity.

Milestone	Due Date
Dundee Airport Revenue Project: Business Justification Case Approval	October 2025
PSO Contract Extension - Year 3	November 2025
PSO Contract Extension - Year 4	October 2026

Key Risks

Risk	Mitigation
Public Service Obligation is not renewed following end of current contract	Explore options with both Governments and TCRD to alternate existing capital funding to revenue to allow this to be used as revenue support for the new PSO subsidy





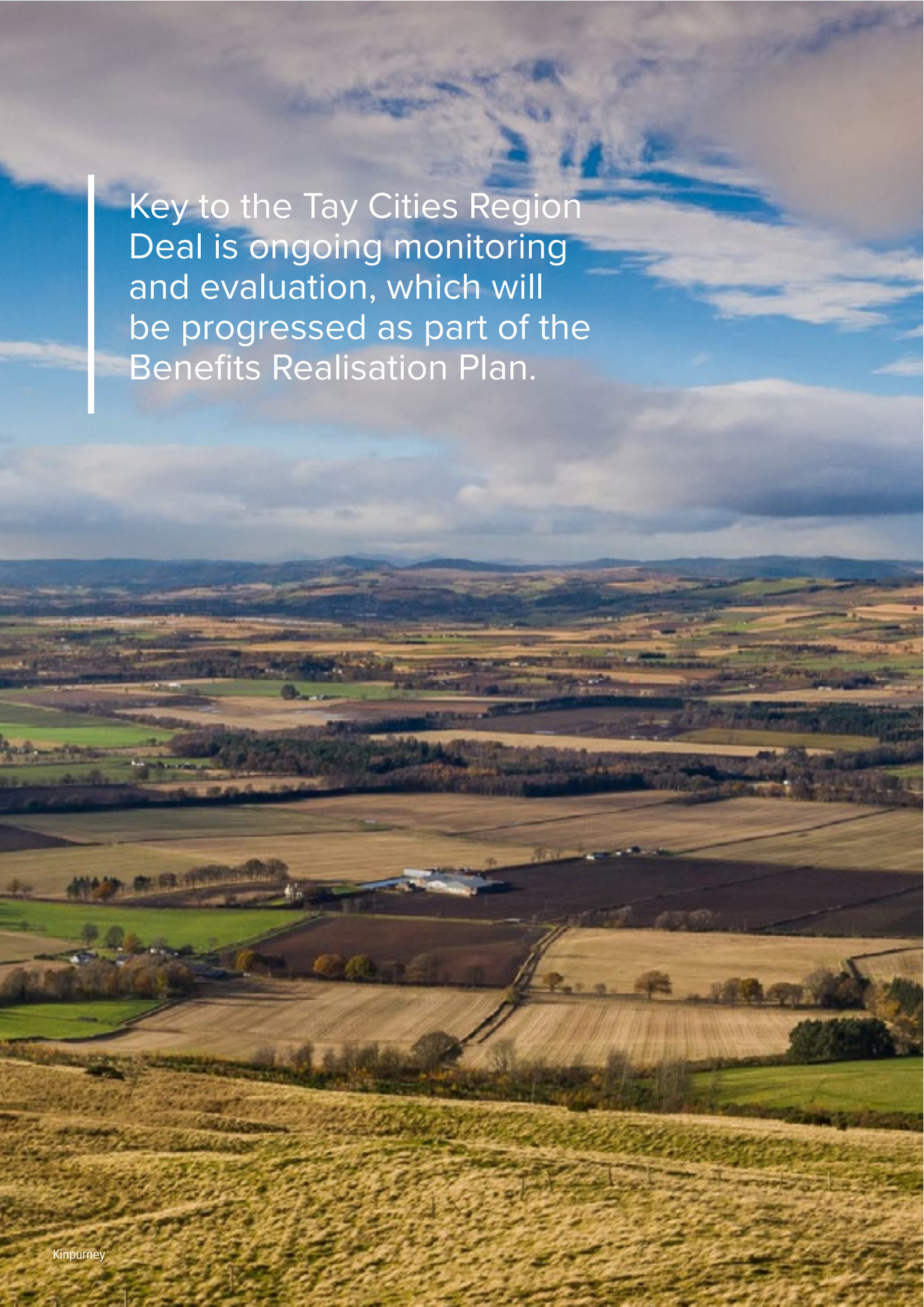
CASE STUDY

Tay5G has delivered a programme of 11 trials (with a further trial underway) where diverse sectors are supported and enabled by advanced, wireless connectivity. This technology paves the way for agile and more cost-effective solutions and realisation of new products, processes and services.

Tay5G worked with partners AIX Live and Abertay University led CoSTAR Realtime Lab to design and execute practical, lowlatency trials to prove how advanced connectivity can unlock new formats in live, immersive and data-rich production. The team built and operated real-time workflows across studio and event settings, ran multi-site demonstrations, and developed an operating playbook that partners can now reuse for future deployments. By coupling technical delivery with strong industry engagement, AIX Live turned Tay5G from a connectivity trial into a route to market, attracting collaboration, de-risking innovation for SMEs, and enhancing the Tay Cities region's profile as a leading UK hub for creative and digital production.

The project culminated in a first-of-its-kind multi-city immersive, interactive watch-party for the Six Nations Rugby Scotland v Wales match. A private 5G network linked two 23m LED volumes in Dundee and MediaCity Salford with CultVR, Cardiff and CoSTAR Screen Lab, Belfast, all centrally controlled from Dundee. Fans used an AIX app to play quizzes, vote and trigger real-time graphics/lighting, while the R&D addressed latency and synchronisation to keep venues in lockstep. This has made a key contribution to development of a distribution platform that can be used nationally and globally for live immersive events. The project also had vital support from the Scotland 5G Centre and collaborators including MediaCity's Immersive Technologies Innovation Hub, dock10 and BBC R&D.



An aerial photograph of a rural landscape. The foreground shows a grassy hillside. Below it, there are several large fields in various stages of cultivation, some green and some brown. A farm with several buildings is visible in the middle ground. The background consists of rolling hills under a blue sky with scattered white clouds.

Key to the Tay Cities Region Deal is ongoing monitoring and evaluation, which will be progressed as part of the Benefits Realisation Plan.

Leverage Statement

At the time of Deal Signing, the named Fund, Programmes and Projects made a commitment to secure £400m leverage through the Tay Cities Region Deal, over 15 years. The Deal definition of leverage is the provision of financial and other incentives to mobilise partner and stakeholder resources. This includes equipment and people as well as funding.

Since Deal Signing in December 2020, a significant amount of leverage has been secured to the end of this reporting period. Table 2 summarises the leverage position up to the end of Q2 2024.

The full leverage figures are based on the named Projects at Deal Signing, and those that have been named as part of a Programme and Fund. The total number of jobs created and committed only includes individual projects.

Table 2: Tay Cities Region Deal Leverage Summary

TCRD Thematic Board	Programme/Fund/Project	Approved Leverage Commitment ⁶ £000	Leverage secured to end of Q2 2025 (£000)	Leverage received to end of Q2 2025 (£000)
An Empowered & Inclusive Tay				
Skills	Regional Skills & Employability Development Programme	0	See Projects	
	• Skill Programme Manager	0	0	0
	• Digital Skills (Phase 1)	0	0	0
	• Life Sciences Biotechnology and Medical Technology: Growing the Tayside Biotech, Biomedical and Agritech	0	0	0
	• Supporting SME Skills	0	0	0
	• Sustainable Construction Skills	0	0	0
	Tay Cities Engineering Partnership	500	566	487
	Aviation Academy for Scotland	0	0	0
An Innovative, International Tay				
Innovative, International	Growing the Tay Cities Biomedical Cluster	119,099	40,286	39,755
	International Barley Hub	0	7,617	7,617
	Advanced Plant Growth Centre	0	14,524	14,524
	Angus Fund	38,900	See Projects	
	Mercury Drone Ports	0	0	0
	cyberQuarter	5,024	10,049	10,049
	Just Tech	0	0	0

⁶ Approved leverage commitment, either at Deal Signing, as part of an approved Full Business Case/Business Justification Case or approved change Request. The Programmes and Fund commitments have been reduced accordingly where commitments have been confirmed for a Project within that Programme or Fund



Other Core Benefits for the Region

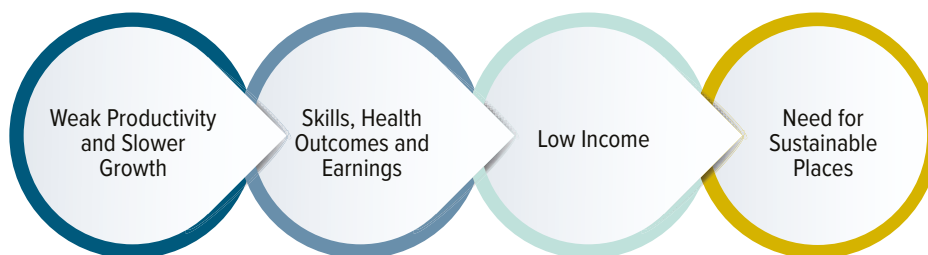
There are a number of other ‘core’ outputs for the Region, as agreed at Deal Signing. These include training places, visitors, development space unlocked, spin-outs created and SMEs supported. The achievements to date are:

Output	Commitment at Deal of Signing	Realised up to Q2 2025/26
 New Jobs	6,083	2,313
 Construction Jobs	648	1,322
 Protected Jobs	172	1,672
 Training Places	591	5,131
 Development Space Unlocked m²	7,755	24,737
 Visitors	24,231	667,680
 Start Ups	28	30
 SMEs Supported	170	2,215



Delivering Inclusive Growth

Recognising that the ultimate aim of the Deal is to enhance the lives of the region’s residents, the Governments, Partnership and Projects are committed to working together to realise a shared ambition for inclusive growth. The inclusive growth challenges that are specific to the Region include the following:



Each Project has set out their approach to addressing the regional inclusive growth challenges as part of their business cases and through position-statements to support the Benefits Realisation Plan. The following case studies demonstrate examples of inclusive growth delivery.

CASE STUDIES



Perth Museum

Perth Museum is committed to addressing the declining cultural tourism visits to Perth and to broaden cultural participation amongst local audiences within Perth & Kinross and throughout Scotland. The Museum promotes Equalities and Fairer Growth within Perth & Kinross and the wider Tay Cities Region through culture and heritage. In the first year of opening Perth Museum contributed to inclusive growth in the following ways:

- The Museum directly employs 30 staff in new roles, exceeding targets for employment opportunities.
- 13 FTEs were also created during the construction phase of the project
- Recorded a 68% increase in Perth High Street footfall between late March 2024 and the beginning of January 2025.
- Independent visitor research conducted in August 2024 found that 67% of people said that Perth Museum improved their perception of the area as a better place to live, work, or visit.

Visits from nearly 40 different schools across Scotland to Perth Museum, including 300 pupils from 10 schools which are in areas high on the Scottish Index of Multiple Deprivation as part of the Museum’s Partner Schools Programme. This 3-year project creates opportunities to participate in bespoke projects to develop content for primary school learning in a heritage setting.





Discovery Point Dundee

Discovery Point Dundee is actively working towards inclusive growth targets by carrying out activities such as:

- Investing in skills: The ShipWright! programme will engage volunteers with heritage skills and help create more capacity in this specialist area.
- Community engagement: Alongside the capital works, our communities will be put into the heart of our galleries through co-curation, exploring the emotions and themes felt by the men aboard Discovery in a way that is relatable to today's audiences.
- Fair access to opportunities: when we engage with communities we will build in support for attendees, including transport costs and subsistence.



Growing The Tay Cities Biomedical Cluster

Several inclusive growth measures benefitting the regional workforce and community were realised throughout the construction phase of the Tay Cities Biomedical Cluster project, facilitated by Robertson Construction, the main contractor for the construction of the Life Sciences Innovation Hub and the refurbishment of Medtech facilities at Wilson House, such as:

- Robertson Construction facilitated 47 apprenticeship opportunities, 11 of which were brand new apprenticeships initiated during the Biomedical Cluster project. These apprenticeships provide opportunities to learn new skills in joinery, plumbing, electrics, heating and roofing.
- The main contractor also provided 25 weeks of meaningful work placements for students from schools, colleges and universities, as well as individuals supported by employability providers such as Barnardo's, Helm and Alexander Community Development, offering insight for these students in the diversity of careers within the construction industry.
- Additionally, 1,729 hours of engagement activities by the contractor were undertaken including career mentoring such as mock interviews, CV advice, and careers guidance as well as engagement with local schools.
- Lastly there were 204 diversity, equality and inclusion (DEI) awareness modules completed by individuals as part of efforts to raising awareness and understanding of inclusion within the construction programme.



Carbon Reductions

On 18th August 2021, the Scottish Government issued guidance relating to carbon assessment and management on behalf of both Governments. This was developed to meet Scotland's net zero whole life carbon emissions trajectory by 2045, and all Projects developing their business case after this date were asked to demonstrate their understanding of the carbon emissions impact of their Project by implementing the guidance. It should be recognised that Projects that received business case approval prior to this date do not have this commitment.

Contributing to the carbon reductions at a regional level will also support the Partnership and Government's commitment to sustainable places, as one of the inclusive growth opportunities. The Growing the Tay Cities Biomedical Cluster, through the Deal investment, have and are continuing to deliver carbon reductions at a regional level. Details of achievements to date are shared below.

CASE STUDIES



Gross Value Added (GVA) for the Tay Cities Region

Whilst many of the City Region and Growth Deals use GVA as a measure for their region to demonstrate the benefits of the Deal investment for a region, the Partnership and Governments agreed that GVA would not be one of the core outputs for the Deal to demonstrate economic growth in the region.

Despite it not being a core output for the Region, best practice and learnings from the Edinburgh & South East City Region Deal have been considered, and their methodology to calculate GVA for the regional associated with jobs created by Projects can be used to demonstrate economic benefits wider than those that the Partnership have committed to.

Based on this, it is anticipated that the current GVA for the region as a result of Deal investment to date is £344,277,400.

This is based on direct new and protected jobs returning £211,152,000 in GVA for the region, and also indirect and direct construction jobs returning £133,125,400 in GVA for the region.

Not only does this demonstrate significant regional economic benefits for the Deal, but it can also be used to support the region's ambitions for economic growth, in line with the Regional Economic Strategy and Prospectus in the future.



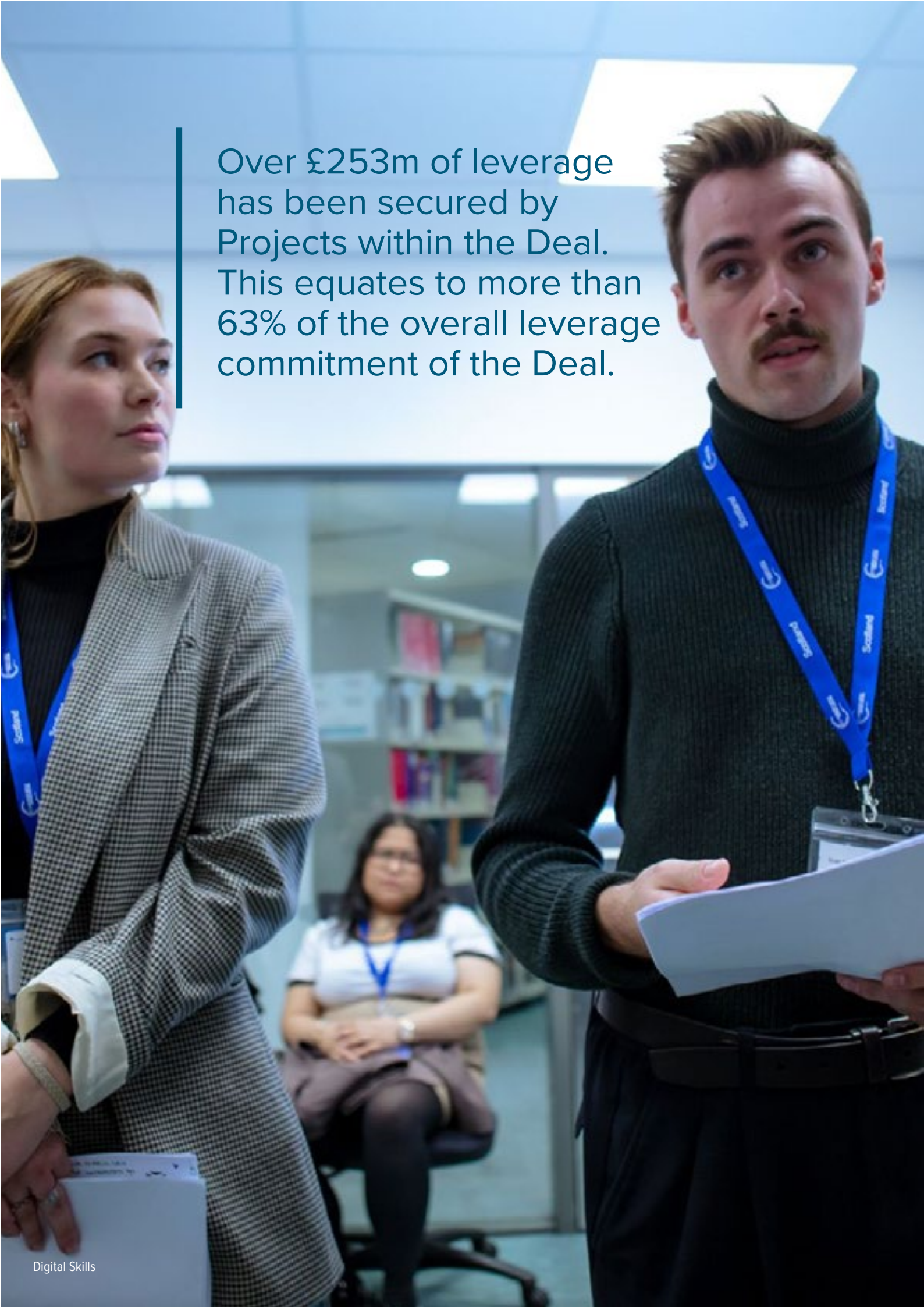


Growing the Tay Cities Biomedical Cluster

Sustainability was a key consideration in the construction of the Life Sciences Innovation Hub, a key component of the Tay Cities Biomedical Cluster project. The building’s orientation optimises daylight and solar gains, reducing overheating and minimising its carbon footprint. A post tensioned concrete frame reduced the amount of concrete required for construction whilst maintaining the performance criteria for lab spaces. The building fabric significantly exceeds minimum airtightness and insulation standards to achieve superior energy efficiency and better occupant comfort.

Moreover, the building was designed to utilise a low carbon heating & cooling solution in a highly efficient and cost-effective way to mitigate the carbon impact of the research and development activities, which are traditionally energy intensive. An innovative, but proven technology was chosen (From Erda Energy) and installed by Black Mountain Developments which consists of fifteen inclined boreholes (each drilled to a depth of 195m), containing coaxial pipes for optimal heat transfer. These boreholes work in conjunction with three ground source heat pumps and air handling units to form a geo-exchange system. Heat extracted from the boreholes is used by the ground source heat pumps, to provide both heating and cooling to the building. In summer, excess heat from the building (captured via air handling units) is recovered and stored back into the ground, effectively using the ground as a thermal energy battery. This stored energy can then be reused during the winter. The system will be continually optimised, relative to changes in ambient temperatures and building occupation etc throughout the year. It is estimated that the system will achieve up to a five-fold reduction on the carbon content to deliver heat compared to utilising gas.





Over £253m of leverage has been secured by Projects within the Deal. This equates to more than 63% of the overall leverage commitment of the Deal.

Financial Statement

The Scottish Government and the UK Government will each invest up to £150m in the Tay Cities Region Deal. A summary of the Deal investment is shown below in Table 4.

Table 4: Tay Cities Region Deal Financial Investment Summary

Tay Cities Region Deal Thematic Board	Programme/Project	Scottish Government Investment (£000)	UK Government Investment (£000)	Partner Investment (£000)	Total Investment (£000)
An Empowered & Inclusive Tay					
Skills	Regional Skills & Employability Development Programme (Phase 2) ¹⁰	8,715	0	0	8,715
	Regional Skills & Employability Development Programme – Skills Programme Manager	516	0	0	516
	Regional Skills & Employability Development Programme – Digital Skills (Phase 1)	1,539	0	0	1,539
	Regional Skills & Employability Development Programme – Life Sciences Biotechnology and Medical Technology: Growing the Tayside Biotech, Biomedical and Agritech	1,975	0	0	1,975
	Regional Skills & Employability Development Programme – Supporting SME Skills	2,470	0	0	2,470
	Regional Skills & Employability Development Programme – Digital Skills (Phase 2)	2,785	0	0	2,785
	Regional Skills & Employability Development Programme – Hospitality Skills	2,000	0	0	2,000
	Regional Skills & Employability Development Programme - Sustainable Construction Skills	1,980	0	0	1,980
	Tay Cities Engineering Partnership	2,000	0	500	2,500
	Aviation Academy for Scotland	0	8,100	0	8,100

¹⁰ The Phase 2 Regional Skills and Employability Development Programme projects are still to be allocated, subject to approval of the Regional Skills and Employability Development Programme OBC refresh.



Tay Cities Region Deal Thematic Board	Programme/Project	Scottish Government Investment (£000)	UK Government Investment (£000)	Partner Investment (£000)	Total Investment (£000)
An Innovative, International Tay					
Innovative, International	Growing the Tay Cities Biomedical Cluster	25,000	0	119,099	144,099
	International Barley Hub	15,000	20,000	0	35,000
	Advanced Plant Growth Centre	2,000	25,000	0	27,000
	Angus Fund	See Individual Projects		38,900	38,900
	Angus Fund: CASI Programme	0	15,000	0	15,000
	Angus Fund: Mercury Drone Port	0	1,000	0	1,000
	Angus Fund: Angus Rural Mobility Hub	0	2,900	0	2,900
	Angus Fund: Zero Four	0	2,000	0	2,000
	Angus Fund: Low Carbon Housing	0	3,000	0	3,000
	Angus Fund: Connecting Montrose	0	2,600	0	2,600
	cyberQuarter	6,000	5,700	5,024	16,724
	Just Tech	0	15,000	0	15,000
	Perth Innovation Highway	0	5,000	17,242	22,242
	Studio Dundee	3,000	0	21,000	24,000
	Advanced Manufacturing Programme	8,000	0	8,000	16,000
	Eden Campus	2,000	24,500	110,394	136,894
	Stretch Dome Simulator	0	300	0	300
Project Beacon	0	5,200	12,425	17,625	
Culture & Tourism	Regional Culture & Tourism Investment Programme ¹¹	19,000	0	19,000	38,000
	Regional Culture & Tourism Investment Programme - Hospitalfield	5,500	0	5,500	11,000
	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	2,500	0	2,500	5,000
	Pitlochry Festival Theatre	10,000	0	10,000	20,000
	Perth Museum	0	10,000	15,217	25,217
	Innerpeffray Library	0	100	0	100
	Crieff International Highland Centre	0	1,000	660	1,660
	Aero Space Kinross	0	1,600	1,285	2,885

¹¹ The Phase 2 Regional Culture & Tourism Investment Programme projects are still to be allocation, subject to approval of the Regional Culture and Tourism Investment Programme OBC refresh.



Tay Cities Region Deal Thematic Board	Programme/Project	Scottish Government Investment (£000)	UK Government Investment (£000)	Partner Investment (£000)	Total Investment (£000)
A Connected Tay					
Digital	Rural Angus and Rural Perth & Kinross Highspeed Broadband	0	2,000	5,980	7,980
	5G Digital Testbeds	2,000	0	0	2,000
Transport	Low Carbon and Active Travel Hubs Programme – Broxden Low Carbon Travel Hub	789	2,000	6,874	10,374
	Low Carbon and Active Travel Hubs Programme – Perth Active Travel Hub	1,265	0		
	Low Carbon and Active Travel Hubs Programme – Hydrogen Refuelling Station	1,446	0		
	Dundee Airport Investment	9,500	0	400	9,900
	Perth Bus & Rail Interchange	15,000	0	0	15,000
TOTAL		150,000	150,000	400,000	700,000

Since Deal signing in December 2020, a significant amount of funding has been released to the end of this reporting period. Table 5 shows a summary of the claims made to date, to the end of September 2025.

Table 5: Summary of claims made to the end of September 2025

Tay Cities Region Deal Thematic Board	Programme/Project	Total Government Investment over Period of the Deal (£000)	Q3 2020 to Q2 2025 funding released (£000)
An Empowered & Inclusive Tay			
Skills	Regional Skills & Employability Development Programme (Phase 2)	6,735	0
	Regional Skills & Employability Development Programme – Skills Programme Manager	516	184
	Regional Skills & Employability Development Programme – Digital Skills (Phase 1)	1,539	1,295
	Regional Skills & Employability Development Programme - Life Sciences Biotechnology and Medical Technology: Growing the Tayside Biotech, Biomedical and Agritech	1,975	549



Tay Cities Region Deal Thematic Board	Programme/Project	Total Government Investment over Period of the Deal (£000)	Q3 2020 to Q2 2025 funding released (£000)
Skills	Regional Skills & Employability Development Programme – Supporting SME Skills	2,470	777
	Regional Skills & Employability Development Programme – Digital Skills (Phase 2)	2,785	0
	Regional Skills & Employability Development Programme – Hospitality Skills	2,000	0
	Regional Skills & Employability Development Programme - Sustainable Construction Skills	1,980	0
	Tay Cities Engineering Partnership	2,000	1,491
	Aviation Academy for Scotland	8,100	0

An Innovative, International Tay

Innovative, International	Growing the Tay Cities Biomedical Cluster	25,000	25,000
	International Barley Hub	35,000	35,000
	Advanced Plant Growth Centre	27,000	27,000
	Angus Fund: Mercury Drone Port	1,000	505
	Angus Fund: Angus Rural Mobility Hub	2,900	0
	Angus Fund: CASI Programme	15,000	0
	Angus Fund: Zero Four	2,000	0
	Angus Fund: Low Carbon Housing	3,000	0
	Angus Fund: Connecting Montrose	2,600	0
	cyberQuarter	11,700	7,132
	Just Tech	15,000	0
	Perth Innovation Highway	5,000	0
	Studio Dundee	3,000	0
	Advanced Manufacturing Programme	8,000	0
	Eden Campus	26,500	26,500
	Stretch Dome Simulator	300	300
	Project Beacon	5,200	0
	Regional Culture & Tourism Investment Programme (Phase 2)	19,000	0
	Regional Culture & Tourism Investment Programme - Hospitalfield	5,500	3,607
	Regional Culture & Tourism Investment Programme – Discovery Point Transformed	2,500	900
Pitlochry Festival Theatre	10,000	10,000	
Perth Museum	10,000	10,000	



Tay Cities Region Deal Thematic Board	Programme/Project	Total Government Investment over Period of the Deal (£000)	Q3 2020 to Q2 2025 funding released (£000)
Innovative, International	Innerpeffray Library	100	0
	Crieff International Highland Centre	1,000	0
	Aero Space Kinross	1,600	0
A Connected Tay			
Digital	Rural Angus and Rural Perth & Kinross Highspeed Broadband	2,000	2,000
	5G Digital Testbeds	2,000	1,901
Transport	Low Carbon and Active Travel Hubs Programme – Broxden Low Carbon Travel Hub	789	757
	Low Carbon and Active Travel Hubs Programme – Perth Active Travel Hub	1,265	0
	Low Carbon and Active Travel Hubs Programme – Hydrogen Refuelling Station	1,446	0
	Dundee Airport Investment	9,500	1,096
	Perth Bus & Rail	15,000	0
TOTAL		300,000	156,443

Key Headlines

- Up to the end of September 2025, the **Joint Committee approved £231.69m of its awarded funding**. This equates to **over two thirds of the overall Deal funding**. Of this, **£170.98m of funding has been approved by the Joint Committee for individual Projects**.
- More than half of the Deal's funding, **£156.443m**, has been claimed to date. This is a significant milestone for the Deal as it enters it's sixth year.



Regional Collaboration

Regional Economic Strategy Prospectus

The Prospectus for Regional Growth was approved by the Tay Cities Joint Committee in December 2024.

The Prospectus restates the Vision from the Tay Cities Regional Economic Strategy 2019-2039 in supporting the missions of the Scottish & UK Governments in delivering growth from collaborative innovation in four priority “opportunity” themes and two “enabling theme.

In 2025, Heads of Economic Development Group (HoED) have been remitted with progressing the identification of “Leads” for these themes. The leads will lead on the development of thematic content and sector road maps, and co-ordinate wider engagement of stakeholders that informs and strengthens sectoral activity and interventions.

The following have now been agreed:

- Clean Growth for Smarter and Sustainable Places: Angus Council
- Life Sciences, Health and Agri Tech: Dundee City Council
- Tourism and Culture: Visit Scotland/Culture lead (tbc)
- Creative, Digital, Cyber and Games Economy: Fife Council
- Connectivity: Perth & Kinross Council/Tactran
- Skills & Talent: Perth & Kinross Council/Skills Development Scotland

During the year, the HoED have focused meetings around “deep dives” into a number of these themes, led by the identified Leads and Partners namely Life Sciences, Creative & Digital, Skills and Talent.

Clean Growth

The past 12 months has seen activity linked to the Clean Growth Initiative’s (CGI) core aims in information and knowledge sharing, building networks, uncovering synergies and driving further engagement.

The collaboration website, www.taycitiescleangrowth.scot, remains the main source of information sharing and knowledge sharing. The CGI secured support from our Local Authority partners and their ‘Invest In’ teams to link successful projects to the platform and hence provide additional visibility.

It was agreed that in addition to the website being utilised as an online and promotional tool to showcase the region and its advantages in clean growth, it is to continually evolve to provide a platform for complementary initiatives and support functions. The addition of an inward investment business support axis (a new tab on the site) is being explored to provide easy to use access to local authority and public sector consenting bodies as a package of support to set a welcoming environment for those who would like to locate their business in the Tay region. It is being trialled in the circular economy sector.



The CGI continues to be active in the development and support of the Tay Cities Circular Economy Strategy and Action Plan and welcomes the industry drive. The circular economy is one of the main pillars and USPs of the Tay Cities region's clean growth ambitions with a buoyant business network, generating new ideas and bringing forward new projects. CGI has been involved in a number of the initial conversations and is aiming to spotlight this sector later in the year with an event.

The Clean Growth Initiative has provided input into the re-fresh and update of the Regional Economic Strategy. Clean Growth for Smarter and Sustainable Places has been identified as a priority theme in the recently approved 'Tay Cities Region: Prospectus for regional growth'. The CGI will liaise with representatives from the Heads of Economic Development Group and the Management Group to understand how best to support the delivery ambitions of the themes during the remainder of the Region Deal's timeline, specifically where clean growth pillars are identified (circular economy, green agri-tech, sustainable mobility, clean energy, data/digital).

Regional Digital Economy

This year, the Digital Thematic Board has been overseeing the implementation of the Tay Cities Digital Ecosystem group's roadmap, which aims to establish Scotland's most collaborative, digitalised region. This initiative seeks to unlock company growth and investment through a connected and inclusive ecosystem that fosters local digital innovation and talent.

Investment continues to flow into the region's digital infrastructure, with BT Openreach, Virgin Media, and CityFibre leading the majority of fixed-line investments. The Project Gigabit initiative, the UK Government's flagship connectivity program, has awarded the £105m Scotland North-East contract (Angus, Dundee and some of Perth and Kinross) to GoFibre, which is currently surveying and significantly investing in the region through fibre installation.

The Shared Rural Network and mobile network operators are being engaged to maximise investment in wireless and telephony services, improving coverage and capacity including urban small cell deployments in Perth. 5G services are now available in most urban areas, with 5G Standalone services set to begin offering additional business functionalities in 2026/27.

As part of the City Region Deal Skills & Employability Programme, the Tay Cities Digital Skills Mapping study was completed alongside the Ecosystem collaboration. This study defined digital skills, benchmarked them against those in other regions and occupations, and proposed potential interventions to address demand and promote growth. The digital skills element of the program in Phase 2 aims to tackle key challenges and seize opportunities within the digital and tech sector.

The Board will liaise with representatives from the Heads of Economic Development Group and the Management Group to understand how best to support the delivery ambitions of the roadmap themes during the remainder of the Region Deal's timeline.



Regional Transport Strategy

The Tayside and Central Scotland Regional Transport Strategy (RTS) is a statutory plan identifying strategic transport priorities for the Angus, Dundee City, Perth & Kinross and Stirling Council. The third iteration of the strategy covering the period 2024-2034 was adopted in June 2024.

The strategy sets out strategic objectives, reflecting regional and national environmental, social and economic priorities; outcomes which identify where regional activity needs to be focused to best support these strategic outcomes; actions which can help deliver these outcomes; and a monitoring framework.

The actions include interventions aimed at:

- Improving access to jobs and training, particularly to reduce inequalities
- Addressing pinch points which affect the reliability of the regional transport network and the Region's connectivity to the rest of Scotland

The strategy recognises that:

- Step changes in activity will be required by all agencies if national aspirations, especially those in relation to climate change and reducing inequalities, are to be achieved
- Given the scale of the challenges and the resources available, activity should be focused on those locations and populations where action will have the biggest impact
- Where we seek to encourage a modal shift from the car or improve access to employment or training, then activity between partners would benefit from co-ordination to provide an integrated solution for the user

During 2024/25:

- Work has been undertaken with partners to develop a Delivery Plan
- In order to improve alignment and coordination, senior officers from the respective Council areas have considered the risks to achieving the outcomes identified in the RTS, and made recommendations to reduce these risks within a RTS Delivery Improvement Programme
- Opportunities to improve efficiency and effectiveness through co-ordination of programmes and resources have begun to be investigated. The Tactran Board have endorsed the establishment of a RTS Delivery Board consisting of a wide range of relevant partners to help co-ordinate the delivery of the Strategy.

The Annual Progress Report 2024/25, presented to the Partnership Board in September 2025, continues to highlight the gap between delivery and the likely achievement of the adopted targets/outcomes, and hence continues to emphasise the scale of the challenge and the scale of change required.

Regional Skills Investment Plan

The Tay Cities Regional Skills Action Plan (TCRSAP) 2025–2028 is a significant step forward for our region. It represents a shared commitment to ensuring that people and businesses across Tay Cities have the skills and opportunities they need to succeed, both now and in the years ahead. The TCRSAP is a framework for collaboration around skills development in the region, informed by a review of evidence as well as employer and stakeholder consultation.



This plan is due to be launched towards the end of October 2025 but is not being launched in a vacuum. Tay Cities already benefits from a strong foundation of further and higher education, a diverse network of training providers, and a strong tradition of partnership and collaboration. Our local authorities, NHS boards, colleges, universities, and third sector organisations have long worked together to support skills and employability. We also have strong links with employers and industry bodies, including through Developing the Young Workforce, Chambers of Commerce, and sector partnerships. These connections ensure that our approach is rooted in the real needs of our communities and businesses.

The plan was designed to provide an agreed, collaborative and focussed response to the skills needs identified through the evidence base review and consultation with employers and stakeholders. There was acknowledgement of the wealth of activity already underway in support of skills development in the region and the need to add value to individual efforts by providing a focus for collaborative action; a framework for partners to come together around a region-wide effort to align skills provision with the needs of businesses and the wider economy. The plan is formed around three central missions:

- Mission 1 – Building skills for future growth
- Mission 2 – Supporting job entry and progression
- Mission 3 – Securing the future workforce

Under each mission, the plan has a series of objectives and actions to achieve these objectives. More detail on timelines and lead/supporting partners are included in the detailed plan.

Regional Tourism Strategy

The Tay Cities Region Tourism Strategy was officially launched in September 2019. Intended to create a strategic link between national and local tourism strategies, the document identified the region's key strengths (the regional connectors) and the strategic themes which can most effectively be addressed at a regional level. The strategy highlights three regional connector themes - outdoor adventures, culture & creative and food & drink. A mid-term summary of activities delivered to date was produced in May 2022.

Regional working continues to focus on two areas:

1. **Collaboration:** the Regional Tourism Leadership Group, which comprises the Chairs of the four industry-led tourism forums, the local authority tourism leads and VisitScotland, continues to meet three times a year. The aim of this group is to strengthen collaboration and knowledge-sharing across the region and identify areas of commonality. Issues discussed have included cultural destinations, data and insights, and visitor management. The meetings have returned to being held in person which also enable the group to experience key attractions, including Tay Cities Region Deal supported investments, such as Discovery Point, Dundee and Perth Museum, Perth & Kinross, as well as Arbikie Distillery, Angus and The Old Course, St Andrews. The tourism officers group continues to meet on a regular basis to oversee activity and share ideas and opportunities.
2. **Internationalisation:** work continues on the successful 'Scotland's Tay Country' programme, which focuses on raising awareness of the region with travel trade intermediaries (travel agents, tour operators and destination management companies) and supports businesses to develop experiences that match market appeal. Initially delivered by regional partners, a contractor was



appointed to deliver the programme, funded by the UK Shared Prosperity Fund. The travel trade buying cycle is lengthy with the tour operators and travel agents often working 18-24 months ahead of the tour dates. The programme has worked extensively with businesses across the region to build capacity and encourage visitation into the region.

Activity delivered to date includes:

- Scotland's Tay Country website as online resource for local businesses and overseas buyers
- Regional sales representation at travel trade events and delivery of familiarisation visits for tour operators.
- Individual product presentations to tour operators, destination management companies and others.
- Online product directory with 221 businesses represented.
- Business toolkit to support businesses looking to engage with travel trade.
- Promotional content to promote the region and inspire tour operators to bring visitors to the region: destination videos, video itineraries and inspirational itineraries.
- Trade-Ready Training which includes webinars and individual training sessions for businesses
- To date, the number of organisations receiving non-financial support through the Scotland's Tay Country travel trade programme is 563.

Regional Economic Partnership Network

The Heads of Economic Development Group have actively participated in the Regional Economic Partnership Network Meetings chaired by the Scottish Government, ensuring representation and influence in shaping regional policy and funding streams.



Reflections and the Year Ahead

Reflections

The Tay Cities Partnership continues to work collaboratively to ensure that Projects are delivering to benefit local and regional economy. In addition to the delivery of Projects and PR & Comms activity, the Partnership has also seen the following milestones met over the last year:

- Publication of the updated Tay Cities Benefits Realisation Plan in March 2025;
- Publication of the Tay Cities Annual Performance Report October 2023 - September 2024 in March 2025;
- PR and Comms Protocol annual refresh in Spring 2025.

Upcoming Milestones

Over the coming year, the Tay Cities Region Deal is committed to a number of activities relating to the Deal and regional collaboration work. The milestones and key dates are set out in Table 6.

Table 6: Milestones

Milestones	Target Date
New Heads of Economic Development Group, Management Group and Joint Committee Chair/Vice Chair appointed	December 2025
Submission of draft Annual Performance Report and updated Benefits Realisation Plan to Governments	December 2025
Publication of the Tay Cities Benefits Realisation Plan	March 2026
Publication of the Tay Cities Annual Performance Report	March 2026
Annual Conversation	March 2026
Review of the Deliverability of the Programme	Autumn 2026

Strengths

Resilience and Strategic Delivery

The Tay Cities Partnership has continued to demonstrate resilience and strategic focus. Through the commitment and collaborative efforts of all Partners, and with support from both the Scottish and UK Governments, the Partnership remains a dynamic and results-driven force in delivering the ambitions of the Tay Cities Deal. Continuous improvements and efficiencies are being achieved by embedding best practice across all aspects of delivery.

Projects Completed to Date

The Partnership has successfully completed several transformative projects that are already delivering significant benefits to communities and businesses across the Tay Cities Region. These include:



- Rural Angus and Rural Perth & Kinross High-Speed Broadband – Enhancing digital connectivity and enabling economic growth in rural areas.
- Perth Museum – A world-class cultural destination attracting visitors and supporting the local economy.
- Pitlochry Festival Theatre – Strengthening the region’s cultural offering and tourism sector.
- Advanced Plant Growth Centre – Driving innovation in sustainable agriculture and food security.
- International Barley Hub – Supporting cutting-edge research and global leadership in crop science.
- Growing the Tay Cities Biomedical Cluster – Expanding life sciences capabilities and creating high-value jobs.

Exceeding Commitments

Beyond these milestones, an increasing number of projects are surpassing their original benefits commitments. This demonstrates the strength of the Partnership’s approach and the value of collaborative investment in regional priorities.

Inclusive Growth and Sustainability

The Tay Cities Deal continues to make strong progress towards Inclusive Growth targets, with many key indicators already achieved. Projects are creating opportunities for communities across the region, ensuring that economic benefits are widely shared. In addition, Deal projects are contributing to regional carbon reduction, reinforcing the Partnership’s commitment to sustainability and climate action. This aligns with national and global priorities for a low-carbon future.

Challenges

The Partnership have had a successful Year 6, building on the positive outcomes achieved in previous years. There are, however, some challenges currently facing the Partnership at both a regional and local level, which are being actively managed and considered by the Deal Partners. These include:

Business Cases not Securing Joint Committee Approval the Year Ahead of Agreed Profile

There is a challenge for the Partnership in securing timely Business Case approval. The Partnership will continue to support Fund, Programmes and Projects to secure Business Case approval in advance of the first year of claiming Deal funding. This includes the previous mentioned workshops which have been attended by the Partnership, to allow the effective delivery of the Deal and to understand the business case timetable milestones for all Programmes and Projects still to be developed.

Resource, Capacity and Experience Pressures

Across the Partnership, including Project Owners and the PMO, resources, capacity and experience pressures have been highlighted. This includes challenges relating to resources to lead and develop business cases, as well as experience with Green Book business case writing for example. The Partnership will continue to ask Project Owners and Partners alike to formally identify similar challenges to understand and manage the implications for the effective delivery of the Deal Programme.



The Impact of Inflation and Cost Increases

Inflation over the last few years has affected the cost and timescales of delivery for many Projects and Partners. This is being managed by the Partnership through:

- Project Owners reviewing and managing their projects, including identifying mitigation approaches such as Value Engineering and securing additional funding;
- The development and implementation of an Early Warning Notification approach, which ensures that Projects can share inflationary concerns and potential impacts to their Projects as soon as known with the Partnership, for them to consider; and,
- Quarterly Assurances provided to the Partnership regarding the delivery of the funding and the commitments by the Project Owner and their Finance Director.

Reshaping the Tay Cities Region Deal

To enable the Partnership to be in the best position, both for future economic investment funding opportunities and to continue to effectively deliver the remainder of the Deal, it is currently undertaking a reshaping exercise. This approach was presented and agreed to Joint Committee in March 2025. Assurance is being sought on all Fund, Programmes and Projects within the Deal Programme that they can still deliver to the Deal Commitments that they entered into.

As you would expect for any Deal over a 10 year period, there are likely to be some Projects which are no longer able to deliver within the funding requirements. It is anticipated that this work may include the identification of new projects within the Deal. The Partners will engage with both Governments throughout the development of this work. The Partners aim to have a revised Deal Programme in place—designed for effective delivery of the remaining Deal commitments —and formally agreed with both Governments by Autumn 2026.





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Further Information

Tay Cities Region Deal website www.taycities.co.uk

Tay Cities Publications, including the Deal Document and regional strategies/plans www.taycities.co.uk/publications

Tay Cities Joint Committee Papers www.taycities.co.uk/joint-committee

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