



An Economic Profile of the Dunfermline Area

December 2011

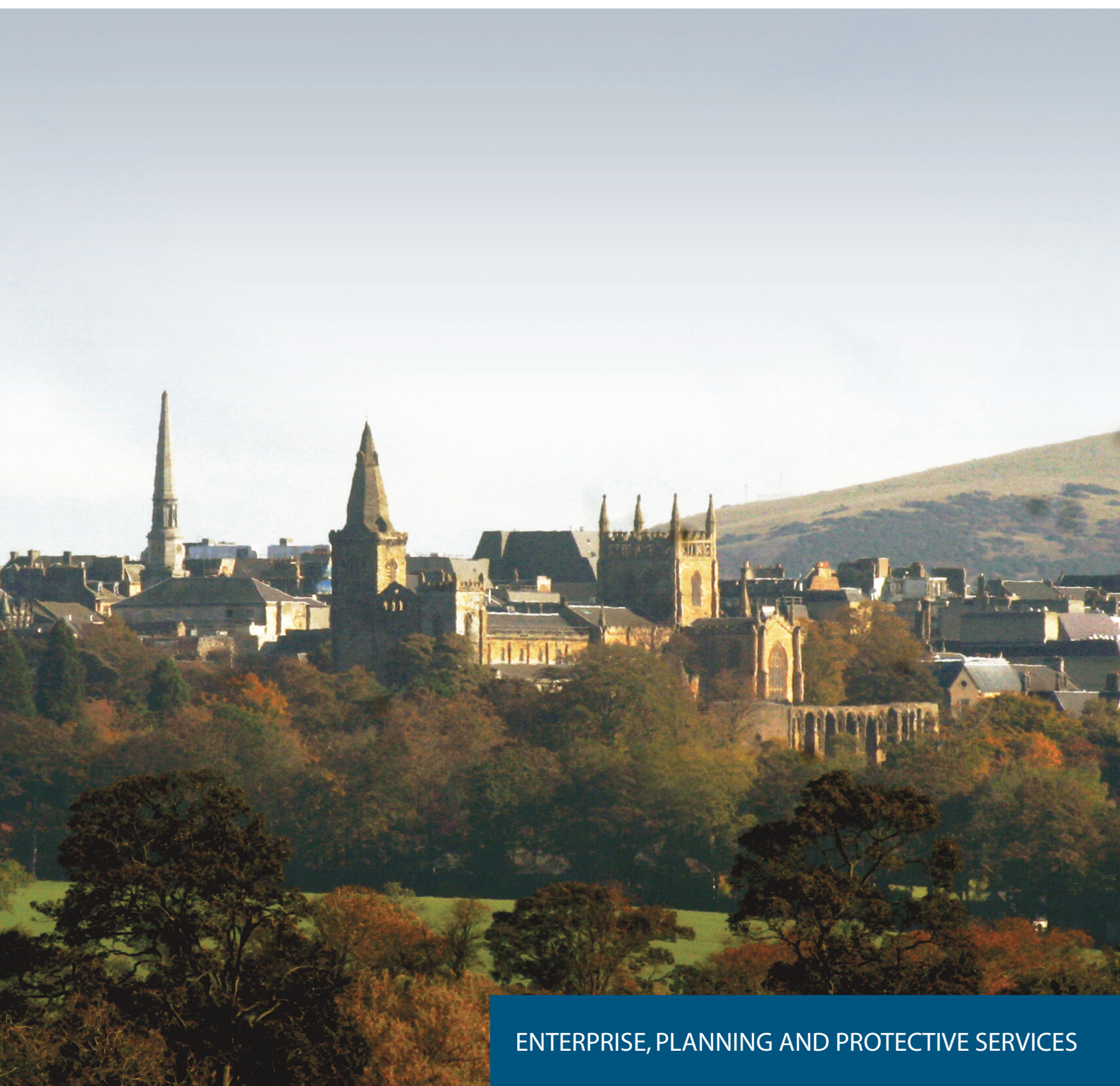


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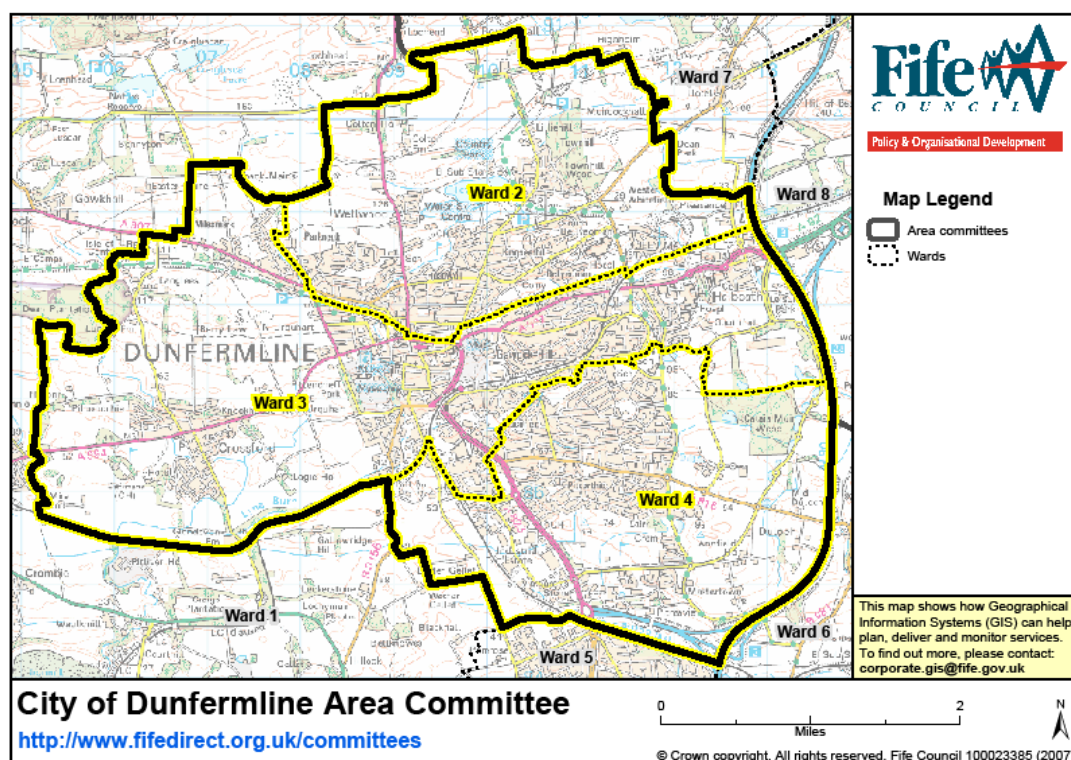
INTRODUCTION

Economic profiles for the seven area committee areas in Fife were undertaken in 2011.

These are designed to assist with understanding of the key economic issues, challenges and opportunities within the area as a starting point and building block to develop a portfolio of economic development interventions. The profile is also intended to assist with policy design and inform business decisions.

The profile pulls together a wide range of economic information and statistics, all of which are publically available. These indicators are inter-linked and play a part in the overall health and performance of the Dunfermline economy. The linkages and relative performance of the various indicators are also explained.

DUNFERMLINE AREA COMMITTEE BOUNDARY MAP



There are three multi-member wards (wards 2, 3 and 4) comprising the Dunfermline area as shown on the map.

ECONOMIC BACKGROUND

Dunfermline

- For six centuries Dunfermline was Scotland's capital. Seven kings including King Robert the Bruce are buried there.
- The 12th century Benedictine Abbey, founded by Queen Margaret, was the first in Scotland and is the final resting place of King Robert the Bruce.
- Abbot House, a 16th century building is an award winning heritage centre, with café, and 17th century style terrace garden.
- In the 18th century the town became a prosperous textile centre and in the 19th century was birthplace to millionaire industrialist and philanthropist Andrew Carnegie.
- By the late 19th century Dunfermline was famed for the production of fine linen.
- The early 20th century saw the establishment of the Royal Naval Dockyard at nearby Rosyth. Later in that century came the growth of the coal mining industry in the Cowdenbeath area and to the west of Dunfermline.
- In the late 20th century the local economy diversified away from traditional manufacturing, defence and coal mining towards modern service-based industries including electronics, engineering, financial and business services as well as tourism.
- Manufacturing in the town was rejuvenated by the early 1960s when the Monotype Corporation opened a new factory in Halbeath. Pitreavie Business Park opened in the mid-1970s, following the arrival of Philips and the re-location of the offices of the Dunfermline Press. Smaller industrial estates were focused on Dickson Street, Halbeath Drive and Primrose Lane.
- Dunfermline is the base to some major national and international companies, including BSKyB, CR Smith, HBOS Bank of Scotland and FMC.
- Building work commenced on the Fife Leisure Park in 1999. The 35-acre site within the Dunfermline Eastern Expansion (DEX) is currently home to over 17 food and leisure-based operators.
- Carnegie College is a further education college located in the town. It is a partner to the Dunfermline Business Centre and provides courses catering to over 10,000 students annually. The college has particular specialisms in Business, Technology, Creative Arts and Construction courses

DEMOGRAPHICS

Population and Socio- Economic Classification

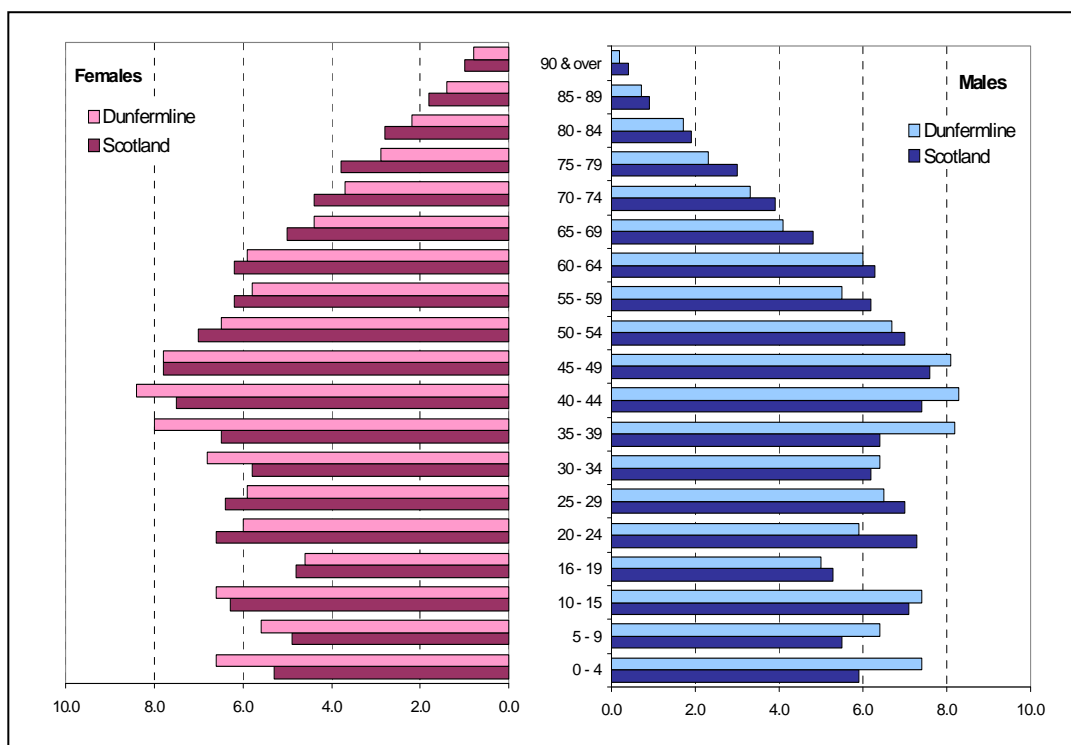
- Fife's population in 2010 was 365,020. Fife makes up 7% of Scotland's total population.
- The Dunfermline Area population was 51,360, which is 14.1% of Fife's total population.
- In 2009 the male population in Dunfermline was 23,151 or 48.5% of the total population. The female population makes up 51.5% of total population, at 24,587.

Table 1: Estimated Population of Dunfermline Area Committee, 2005 - 2010

Year	Mid-year Population Estimate
2005	48,502
2006	48,868
2007	49,425
2008	50,325
2009	50,922
2010	51,360

Source: General Register Office for Scotland

Figure 1: 2010 Male and Female Population Shown by 5-Year Cohorts



Source: General Register Office for Scotland

- There are a higher percentage of young people under 16 (19.8%) in the Dunfermline area than in any other area in Fife.
- Dunfermline also has the highest percentage of its population aged between 16-64 (66%), whilst the Fife average is 64.6%

There were just over 24,200 households in the Dunfermline area in 2011, which is 14.3% of the Fife total. Of these: -

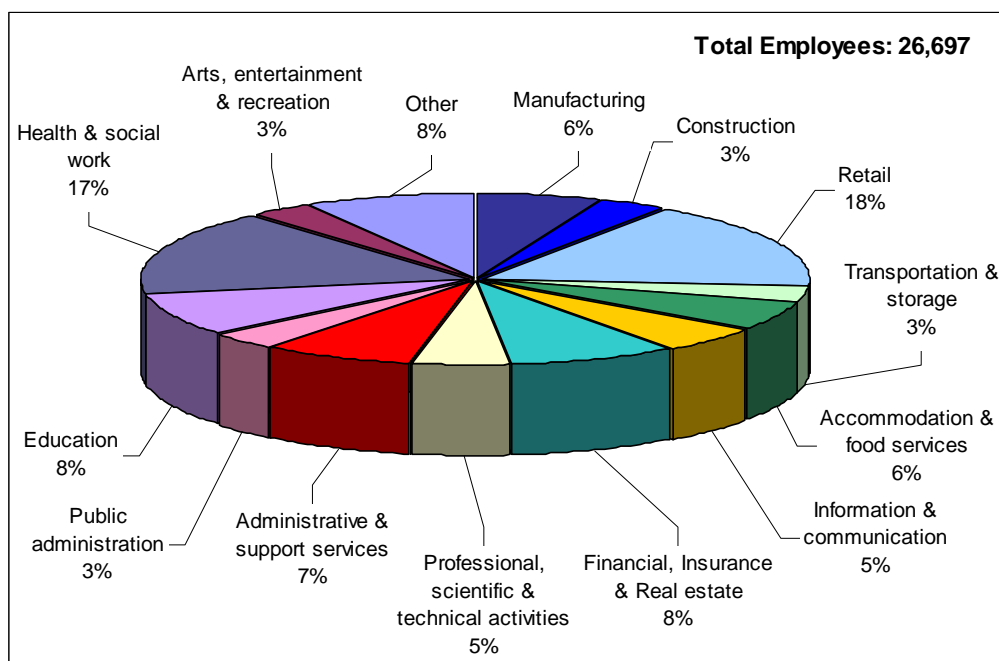
- 18,487 (76.3%) of households were owner occupied, which is the highest area percentage in Fife, the lowest is Cowdenbeath at 60.1%.
- 3,330 (13.8%) were rented from Fife Council.
- 1,184 (4.9%) were rented from other social landlords.
- 1,062 (4.4%) were rented from a private landlord; and
- 162 (0.7%) were classed as second homes, the highest percentage was in the North East Fife Area (4.0%)

LABOUR FORCE

Employment by Sector

- The working age population of the Dunfermline area in 2009 was 31,280 which represents 66.2% of the total population.
- The employment rate, as a percentage of the working age population in the Dunfermline area is 82.2%, compared against the Fife average of 70.9%
- During 2009 there was an average of 4,818 benefit claimants. Benefit claimants make up 15.4% of the total working age population, which is below the Fife average of 16.7%.

Figure 2: Employment in the Dunfermline Area shown by Sector in 2009



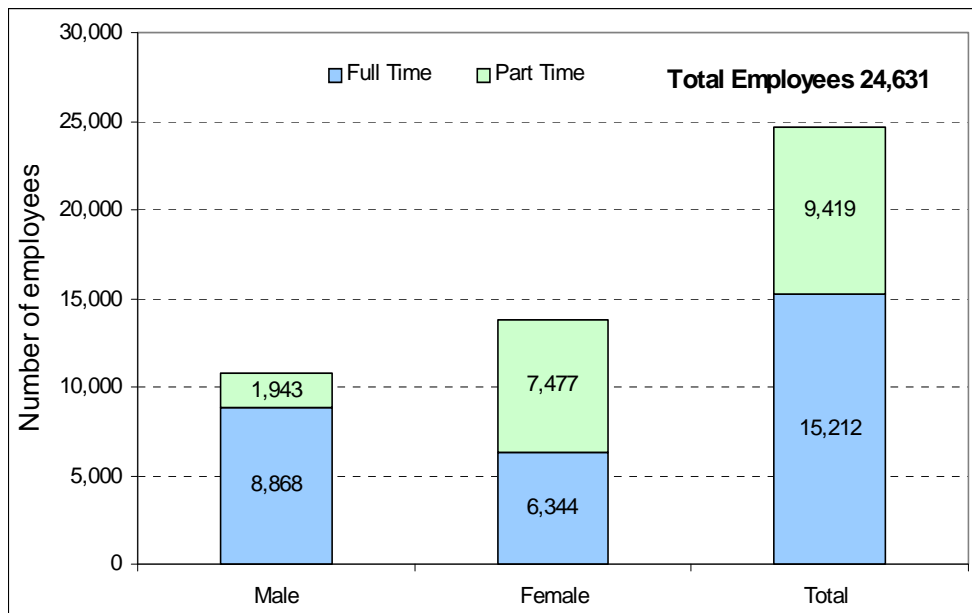
Source: Annual Business Inquiry, Nomis

- The Public Sector, comprising public administration, education and health accounts for around 28% of total jobs.
- Retail is the largest private sector employer at 18%.
- The financial sector accounts for 8% of employment within the Dunfermline area, whilst another 8% are employed in 'other' industries which comprises mining, quarrying & utilities; agriculture, forestry & fishing; water sewage and treatment.
- Manufacturing, accommodation and food services each account for 6% of employment in the Dunfermline area.

Employment by Status

- Around 58% of full-time employees in the Dunfermline area are male.
- Around 54% of all female employees in the Dunfermline area work part -time.
- As a total, 62% of employees in the area work full-time and 38% work part-time.
- Overall there are more jobs occupied by females than males in the Dunfermline area. This likely reflects the fact that there are slightly more females of working age (16 – 64 years) than there are males, and also the importance of the retail sector as an employer which tends to attract more female workers.

Figure 3: Full-time and Part-time Employment in the Dunfermline Area, 2008



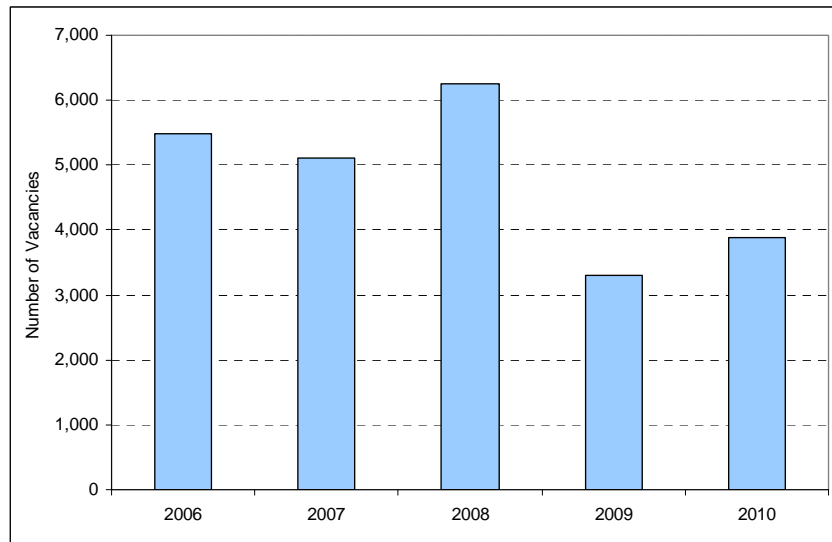
Source: Annual Business Inquiry, Nomis

Jobcentre Vacancies

- An average 3,862 jobcentre vacancies in the Dunfermline area were advertised through the Department for Work and Pensions in 2010.

- This is an increase of 584 since 2009, but is still well below the level of vacancies advertised before the recession.

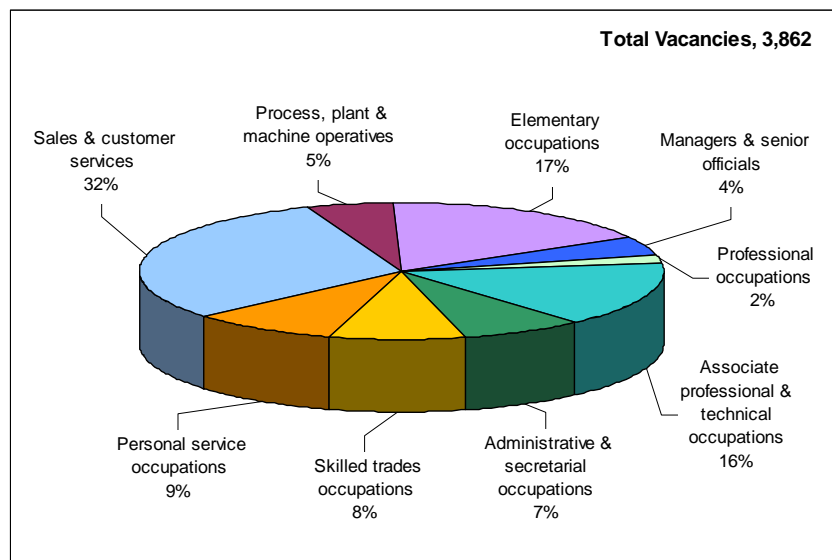
Figure 4: Jobcentre Vacancies in the Dunfermline Area, 2006 - 2010



Source: Vacancies Dataset, Nomis

- Retail, sales and customer services accounted for 32% of the total Jobcentre vacancies in the Dunfermline area.
- Managers and senior officials accounted for 4% of the area's total, which exceeds the Fife average.

Figure 5: Average Jobcentre Vacancies in the Dunfermline Area during 2010



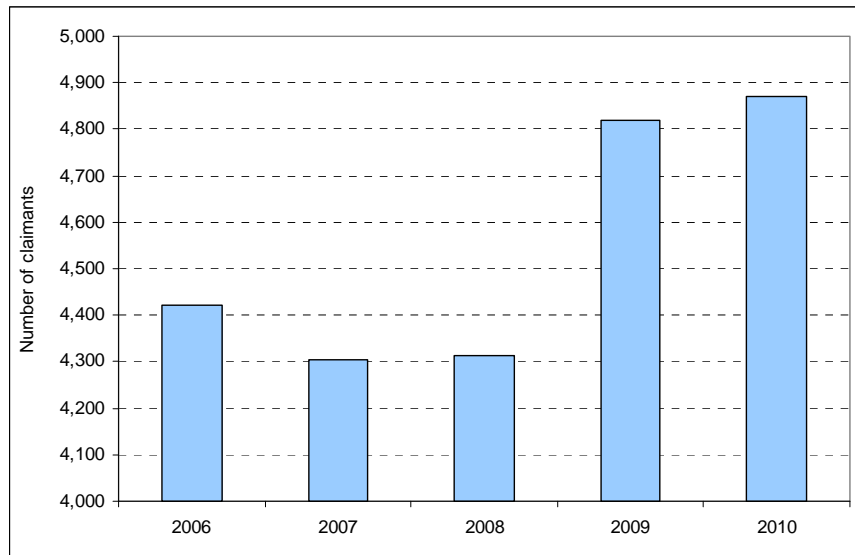
Source: Vacancies Dataset, Nomis

Benefit Claimants

- During 2010 there were a total of 4,871 benefit claimants in the area.

- The average number of claimants in 2010 was 12.9% higher than the 2008 pre-recession level.

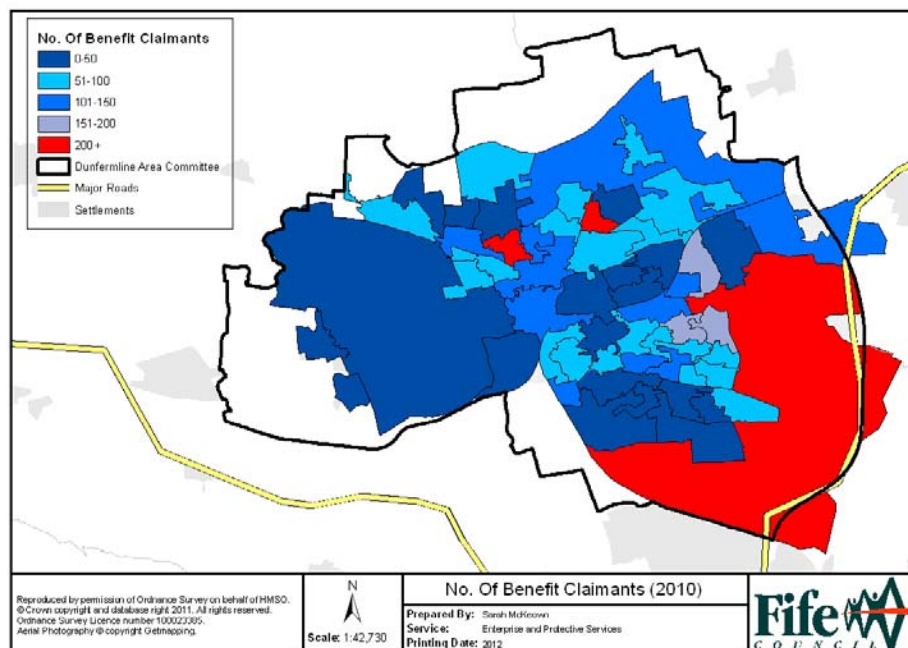
Figure 6: Average Number of Benefit Claimants in the Dunfermline Area, 2006 - 2010



Source: Claimant Count Dataset, Nomis

The distribution of benefit claimants in the Dunfermline area is illustrated in the map below.

Map 1: Location of Benefit Claimants in the Dunfermline Area during 2010



Source: Claimant Count Dataset, Nomis

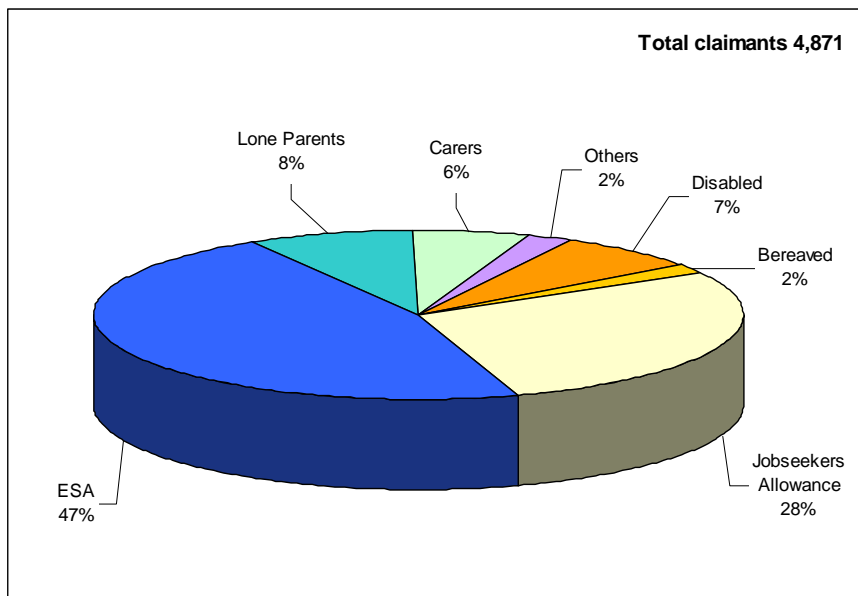
- Claimants are concentrated in the west of the Dunfermline area.

- Low income is assumed to be a factor of deprivation, and benefit claimants can be assumed to have a relatively low income. There are severe pockets of income deprivation in parts of Abbeyview and Headwell.

Claimants by Benefit Type

- There were 4,871 Benefit claimants in the Dunfermline Area in 2010.
- Employment Support Allowance (ESA) & Incapacity Benefit claimants accounted for 46.4% of total claimants during 2010.
- 6% of all the benefit claimants in the Dunfermline area claim as a carer – the lowest percentage of all the area committee areas.

Figure 7: Type of Benefit Claimants in the Dunfermline Area in 2010

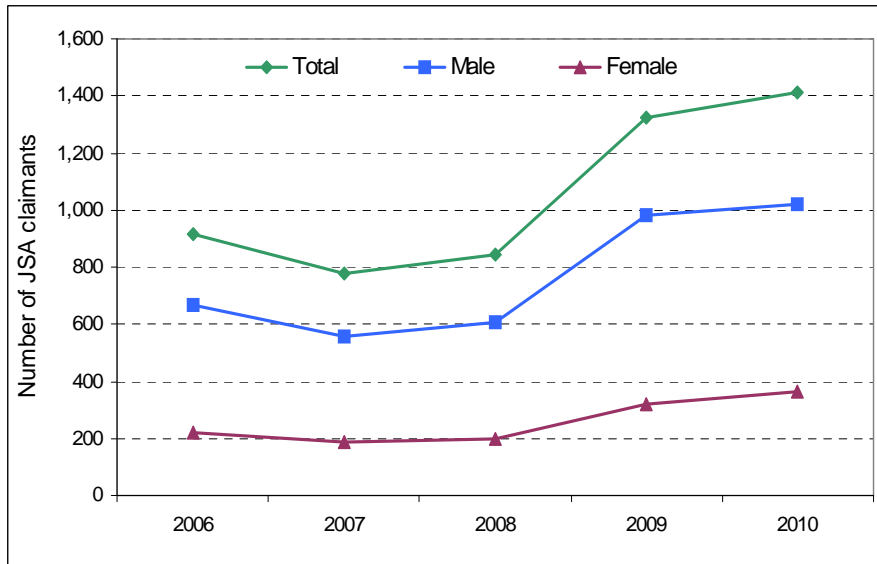


Source: Department for Work and Pensions, Nomis

Jobseekers Allowance

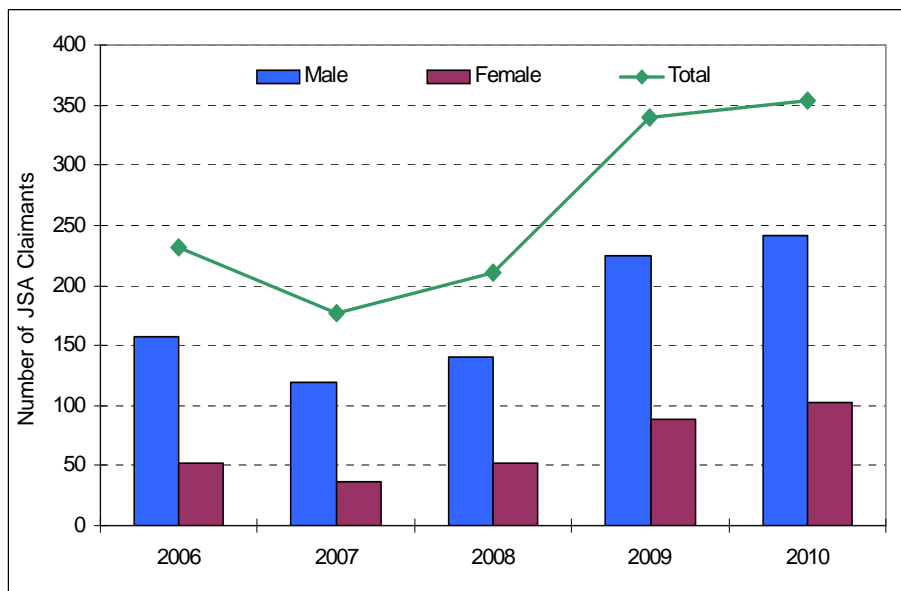
- The number of people claiming Jobseekers Allowance (JSA) rose sharply during the credit crunch of late 2008 but has slowed during 09/10 to reach an average of 1,410.

Figure 8: Number of JSA Claimants in the Dunfermline Area, 2006 - 2010



Source: Claimant Count Dataset, Nomis

Figure 9: JSA Claimants Aged 24 and Under in the Dunfermline Area, 2006 - 2010



Source: Claimant Count Dataset, Nomis

- The total number of JSA Claimants aged 24 and under has risen by 67.7% since 2008. This is higher than the Fife average, which saw 58.6% rise in JSA claimants who were aged 24 and under.
- In the Dunfermline area the male/female ratio of claimants aged 24 and under has reduced from 3 down to 2.4 between 2006 and 2010. This means that in 2010 there were 2.4 males

claiming JSA for every 1 female claiming JSA. At the Fife level the male/female ratio has remained constant at 3:1.

SKILLS

Educational Attainment

- Educational attainment refers to the national qualifications attainment by secondary school pupils from their 4th year (S4) onwards. In terms of S4 educational attainment Queen Anne High School out-performed the Fife and Scottish averages during 2009/10.
- The Scottish Qualifications Credit Framework (SCQF) contains 12 levels ranging from Access at SCQF level 1, up to Doctorate at level 12. SCQF Level 3 refers to the national qualifications taken over two years of study (in S3 and S4) with exams at the end of S4.

Table 2: Proportion of S4 Pupils Attaining SCQF Level 3 or Above

	Total S4 Pupils in 2009/10	S4 year group achieving five or more awards at SCQF Level 3 or above (%)
Dunfermline HS	332	91
Queen Anne HS	322	94
Woodmill HS	164	84
Dunfermline Area	818	90
Fife		92
Scotland		92

Source: Scottish Schools Online

School Leaver Destinations

- The destination of S4 – S6 school leavers from publicly funded schools in the Dunfermline area, represented by the proportions going into full-time higher or further education, training, employment, or unemployed is illustrated in the table below.

Table 3: Destination of Dunfermline School Leavers during 2009/10

	Dunfermline	Queen Anne	Woodmill	TOTAL	Fife	Scotland
Total Pupils	1,581	1,681	941	4,203		
Leavers in 2009/10	305	297	157	759	3,979	54,097
School Leaver Destination (%)						
Higher Education	39	39	26	35	33	36
Further Education	32	36	39	36	37	27
Training	4	3	6	4	4	5
Employment	10	14	11	12	12	19
Unemployment	13	8	18	13	13	12

Source: Scottish Schools Online

- During the 2009/10 academic year Dunfermline schools had just over 4,200 pupils in years S1– S6, and 759 school leavers.
- 75% of school leavers entered higher, further education or training which is above the Fife and Scottish average. In particular the Dunfermline area and Fife overall has a higher proportion of school leavers number entering further education than the national (Scottish) average.
- As a consequence the proportion of Dunfermline school leavers moving straight into employment is below the Scottish average, whilst the risk of unemployment is slightly above the Scottish average but in line with the Fife average.

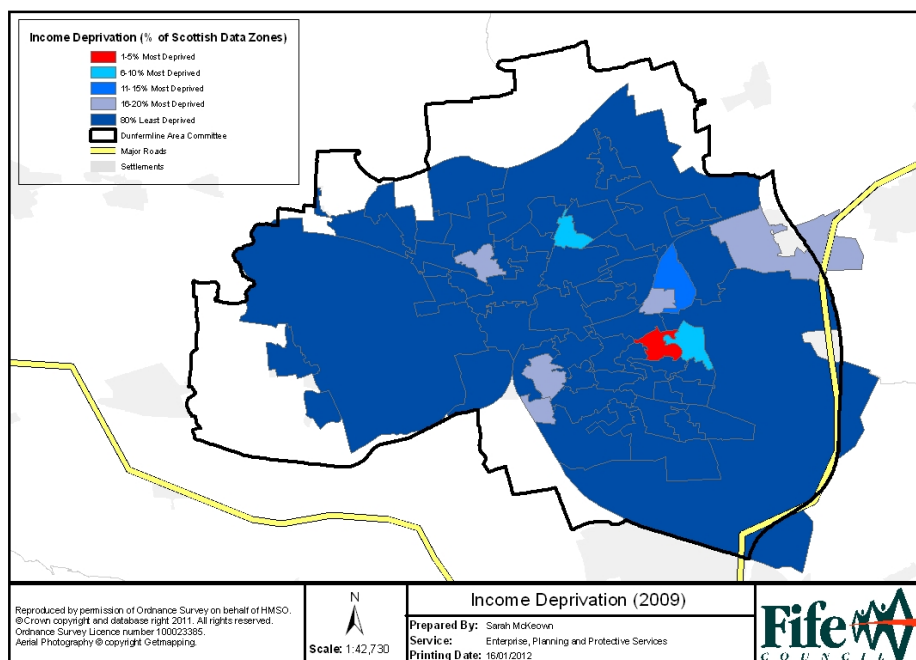
EARNINGS

- Earnings data is not available at an area committee level. However, a study undertaken by Herriot-Watt University in 2004 estimated that the average gross weekly household income in Dunfermline in 2004 was £505, which was 11% higher than the Fife average of £455.
- An above average income in an area may reflect fewer workless households, and relatively more households holding down well paid jobs.

Scottish Index of Multiple Deprivation (SIMD)

The Scottish Index of Multiple Deprivation (SIMD) is the Scottish Government's official tool for identifying small area concentrations of multiple deprivation across Scotland. Datazones are a population-based geography with an average of 750 people living in each datazone.

Map 2: Deprivation for the Dunfermline Area during 2009



Source: Scottish Index of Multiple Deprivation 2009

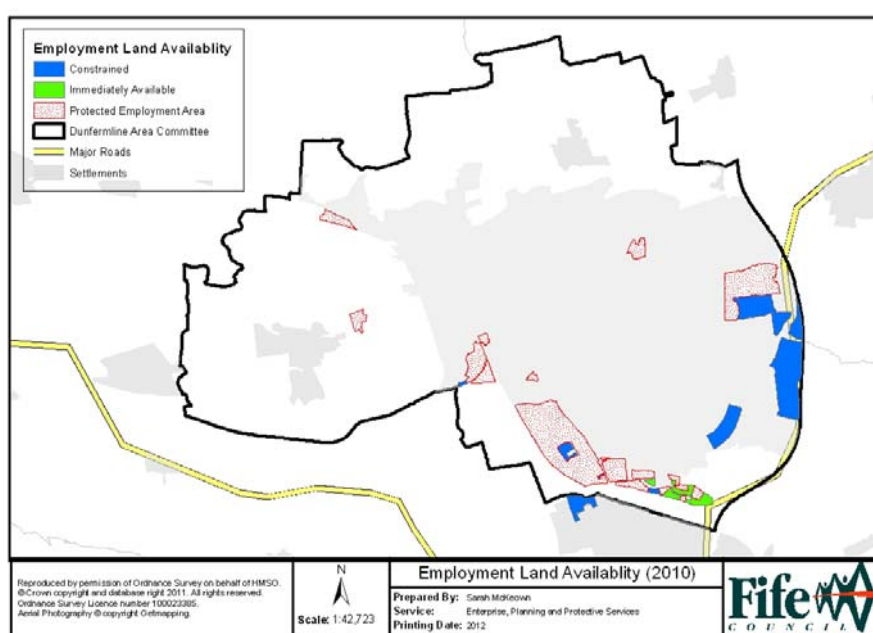
- There are 6,505 datazones across the whole of Scotland and 453 of these datazones are in Fife. The Dunfermline area has a total of 57 datazones, which is 12.6% of the Fife total.
- In the latest (2009) SIMD report, 34 (60%) datazones of the 57 datazones in the Dunfermline Area were classified as being in the top half of all Scotland's datazones. A total of 20 datazones were classed as being in the 20% of the least deprived.
- A total of 9 datazones in the Dunfermline area were ranked in the most deprived 20% of datazones within Scotland with 1 datazone, Abbeyview North, classed within the top 5% of the most deprived datazones in Scotland.

LAND AND PREMISES

Employment Land Availability

- The majority of employment land is available to the east of the area in the Calais Muir and the Hyundia/Freescale employment sites.
- Most of land is classified as constrained, which means some investment is required such as for the utilities supply, ground remediation or road link before making the land immediately for employment purposes.

Map 3: Employment Land Availability in the Dunfermline Area during 2010



Source: Employment Land Audit 2010

Table 4: Employment Land Take Up in Dunfermline Area 2009-2010

Year	Take Up (ha)	Where
2009	2.47 ha	Carnegie Campus, Pittencrieff and Elgin Street
2010	0.21ha	Masterton Park

Source: Employment Land Audit 2009/2010

Businesses

- There are approximately 1,500 businesses within the Dunfermline area.
- As at August 2011 some of the largest employers in the Dunfermline area included:

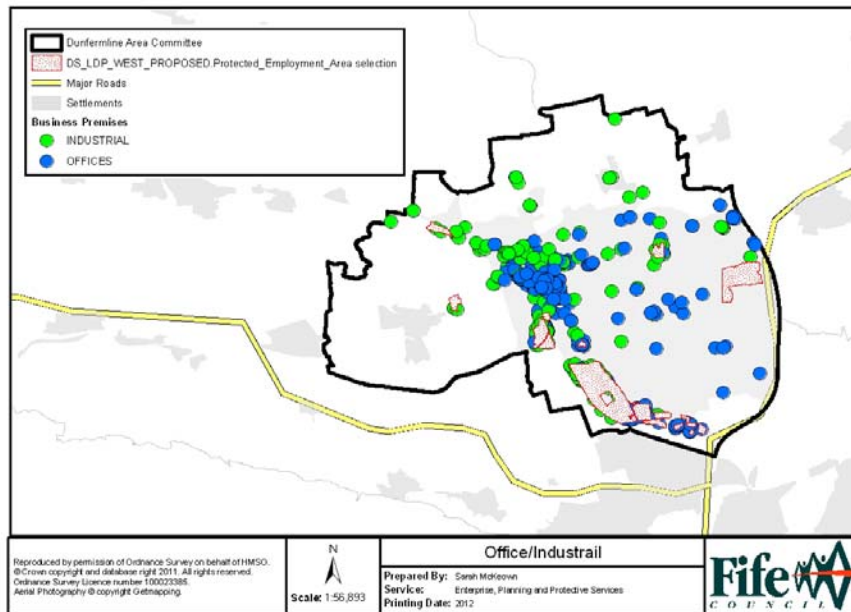
Table 5: Largest Employers in the Dunfermline Area as at August 2011

Company	Business Type	Location
HBOS Bank of Scotland	Customer Contact Centre	Pitreavie Business Park, Dunfermline
BSkyB	Customer Contact Centre	Carnegie Campus, Dunfermline
Carnegie College	Further Education	Halbeath, Dunfermline
CR Smith	Other Manufacturing - Glaziers	Dunfermline
FMC Technologies	Engineering – subsea jackets	Dunfermline
Forfab Ltd	Engineering - fabrication	Pitreavie Business Park, Dunfermline
Optos Ltd	Optical Goods	Carnegie Campus, Dunfermline
Vets Now	Business Services	Castle Riggs, Dunfermline
Asda	Retail	Dunfermline
Tesco	Retail	Dunfermline
B&Q	Retail	Dunfermline
Debenhams	Retail	Dunfermline
Dunfermline Building Society	Financial Services	Pitreavie Business Park, Dunfermline

Source: Enterprise, Planning and Protective Services

- In total there are 482 office and 255 industrial premises in the area, of which were occupied as at 1st April 2010.
- There are more office premises than industrial units in the area.
- The Dunfermline Local Plan specifies protected employment areas where most employment land is concentrated.

Map 4: Location of Business Premises in the Dunfermline Area during 2010



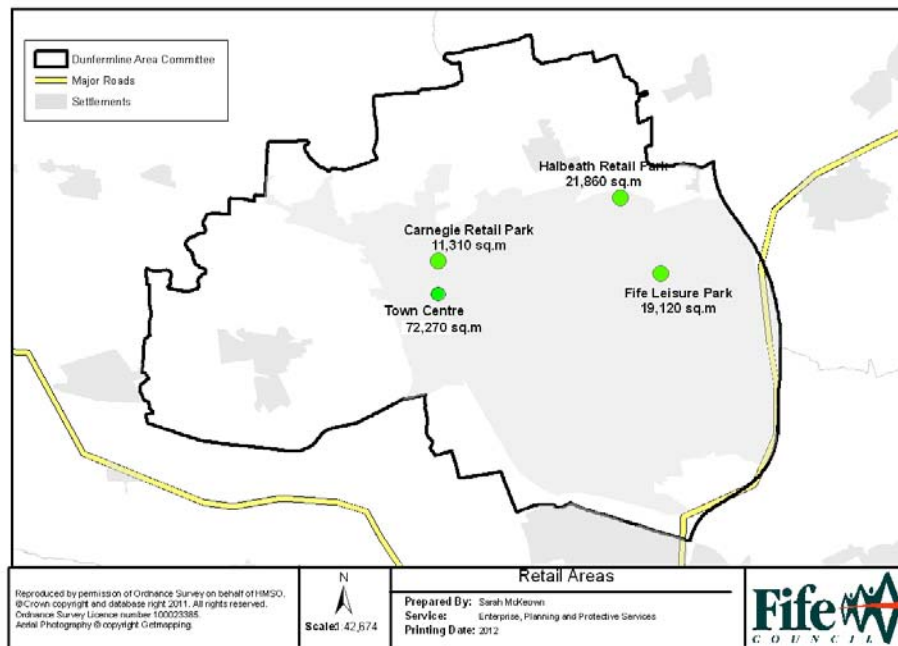
Source: Assessors Data, Dunfermline Local Plan

Retail

One way of gauging the economic prosperity of an area is the volume and types of retailers located there, as investors tend to locate in areas where demand for their goods will be strong. Factors affecting a retailer's decision to invest in an area include the age structure and the socio-economic profile of an area.

- Fife's first Business Improvement District (BID), Dunfermline Delivers, was established in 2009. Fife Council and private businesses will invest more than £1.5 million over the five-year term of the BID, to promote the town, improve perception, image, safety and cleanliness of Dunfermline city centre.
- Dunfermline town centre provides 72,270 sq metres of retail space. To the north of the centre, adjacent to the Kingsgate shopping centre is the Carnegie Drive Retail Park where a number of warehouse store retailers are located. Major shopping facilities are also provided at the Halbeath Retail Park and Fife Leisure Park to the west of the town.

Map 5: Main Retail Areas and Floorspace in the Dunfermline Area during 2010



Source: Goad, Experian (April 2010)

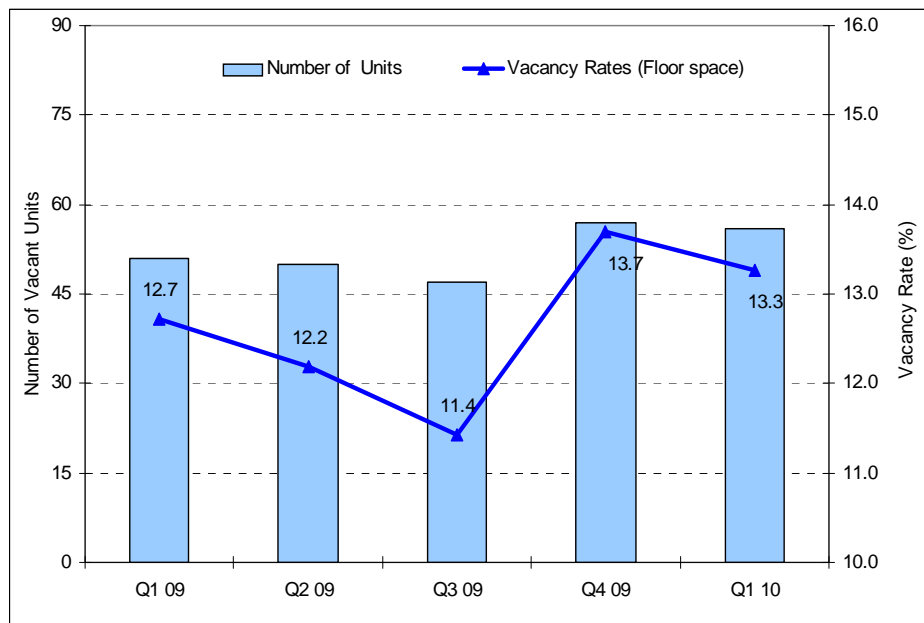
Table 6: Dunfermline Town Centre Retail Floorspace and Vacancy Rates during 2010

Retail type	Floorspace (Sq m)	Floorspace (%)
Comparison	41,050	56.8
Services	9,060	12.5
Convenience	2,460	3.4
Food and Drink	9,160	12.7
Supermarkets	950	1.3
Vacant	9,590	13.3
Total	72,270	100.0

Source: Goad, Experian (April 2010)

- The largest share of floorspace (56.8%) in Dunfermline town centre is for the sale of comparison goods. Comparison goods are non-perishable goods often stocked in a wide range of sizes, styles, colours and quantities, such as clothing, furniture, televisions and carpets.
- Food and Drink and Convenience stores account for around 12.7% of the total floorspace. Convenience goods are those which are widely distributed, are relatively inexpensive and can be purchased with the minimum of effort. These include items such as petrol, newspapers and grocery items.
- The vacancy rate in the town centre is 13.3%.

Figure 10: Dunfermline Town Centre Vacancy Rates Quarter 1 2009 – Quarter 1 2010



Source: Goad, Experian (April 2010)

- Dunfermline vacancy rate is lower at 13.3% than Kirkcaldy at 16.4% and Glenrothes at 14.2%.
- The number of vacant units in Dunfermline in Quarter 1 2010 was 56 this has increased by 5 from the previous year.

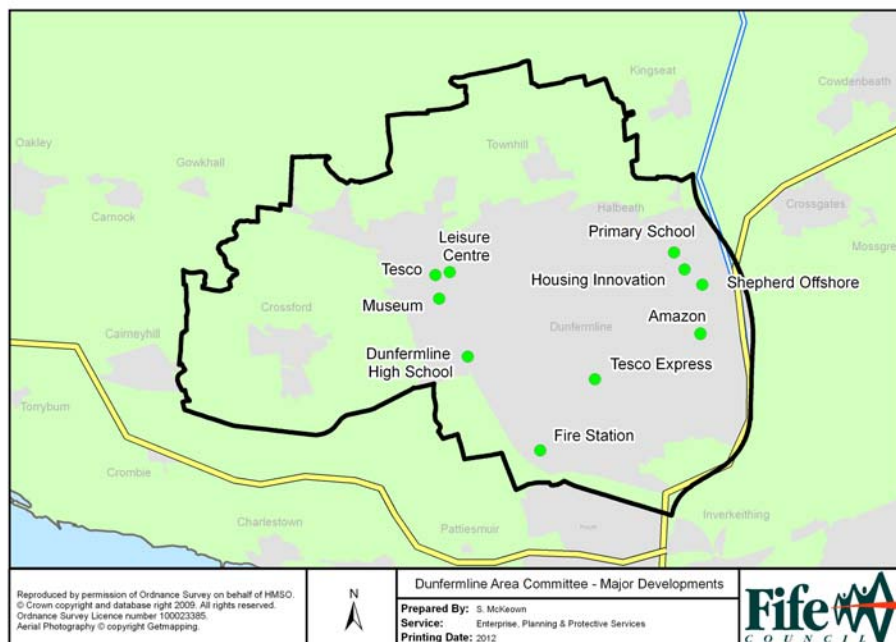
Major Investments in the Dunfermline Area

- A new purpose-built distribution centre for on-line retailer Amazon opened in November 2011. The Dunfermline facility, which measures one million-sq-ft, the equivalent to 14 football pitches, is the biggest Amazon facility in the UK. Amazon employ more than 750 full-time staff at the Dunfermline facility.
- The new Carnegie Leisure Centre (originally Carnegie swimming baths) is the main sports centre for the Dunfermline area. A £17.2 million pound major refurbishment and extension to the centre was completed in November 2011, including a modern 25 metre 6 lane, deck level pool with movable floor; an improved entrance and reception area with a new cafe and a state-of-the art gym with 80 stations.
- The new £7.8 million eco-friendly Carnegie Primary School opened in 2011, with capacity for 240 pupils and 110 nursery children. The new Dunfermline High School is under-construction and due for completion in autumn 2012
- Demolition work on Carnegie Drive has been completed in preparation for a new Tesco store. A new Tesco Express store opened late 2010 on Aberdour Road.
- A new Dunfermline fire station opened in March 2010 at Pitreavie Business Park. This is the largest fire station in Fife providing emergency response cover from Kincardine to Aberdour in the east and Kelty on the border with Perth & Kinross.

- A £50 million extension of the Kingsgate Shopping Centre to the east of the existing centre between James Street and Market Street which increased retail space to around 370,000 sq ft (34,360 sq m) was completed in August 2008.
- Planning permission has been granted to build a new £10 million Dunfermline Museum and Art Gallery on land adjacent to the Carnegie library building. This is to be funded by the Heritage Lottery Fund. Both the library and the former bank buildings will be redeveloped with a new extension creating the museum, art gallery, archive and library space. Work on the museum is expected to start in 2012.
- In May 2012 a Showcase to promote sustainability and demonstrate how new methods of construction can be transferred to mainstream affordable housing will take place in Dunfermline. The Housing Innovation Showcase 2012, a partnership between Kingdom Housing Association and Fife Council with support from the Fife Construction Forum and Green Business Fife will see 27 new houses built by 10 different partners, based on 10 different designs and using innovative construction methods. Once completed the houses will be showcased for 3 weeks, to provide an opportunity for other Consultants, Contractors and Suppliers to showcase their own sustainable products and services.
- The former Hyundai site has been bought by Shepherd Offshore Ltd to develop a renewable energy manufacturing and training facility, forecast to create up to 600 jobs. The demolition started in April 2011 and a master plan is due to be developed during 2011/12.
- Along with BAE System and Thales, Babcock Marine are key partners in the Aircraft Carrier Alliance a unique partnership which will deliver two 65,000 tonne aircraft carriers. In 2011 the Goliath Crane arrived from China and was assembled at Rosyth. Assembly and Integration activities will continue until 2016 when the first carrier is due for completion. A task group involving key partners including Scottish Colleges Fife, Jobcentre Plus and SDS, chaired by Babcock has been set-up to consider the skills requirements for the carriers project and to take account of the skills required for Forth Replacement Crossing and the Renewables sector.
- Morpol are proposing to open a processing and packaging facility in the former Lexmark building in Rosyth following their purchase of the site. The operation could employ up to 400 people in a mixture of roles.
- Construction of the Forth Replacement Crossing, a 2.7 km cable-stayed bridge, began in 2011 and is due to be completed in 2016 at a total cost of £1.47 - £1.62 billion. During the lifetime of the project, Fife Council and Edinburgh City Council, in partnership with key stakeholders representing interests from both north and south of the Forth, will work closely with the consortium, Forth Crossing Bridge Constructors (FCBC) to offer a variety of business supply chain, education, training and employment opportunities, including site-based training, student work placements, visits, lectures and sponsorship of special community projects.

- Fife Council is working with Transport Scotland to deliver the Rosyth and Halbeath Park & Choose Project, in association with the Forth Replacement Crossing.

Map 6: Geographic Location of Key Developments in the Dunfermline Area



Source: Enterprise, Planning and Protective Services, Fife Council

TOURISM

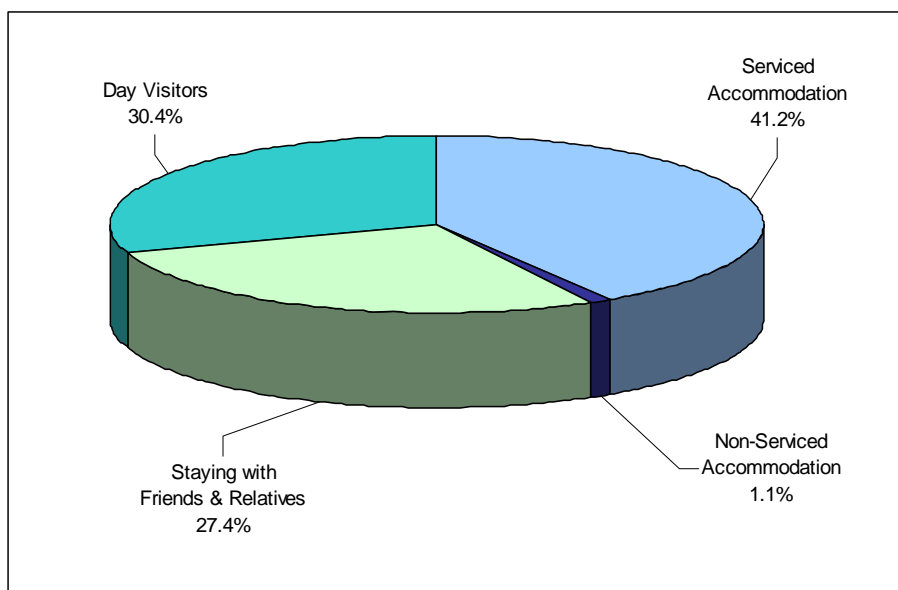
Visitor Numbers and Expenditure

- The Scottish Tourism Economic Activity Monitor (STEAM) is a statistical model which measures the economic impact of tourism at local levels.
- Tourism data for Fife is broken down into four sub-areas - St Andrews, North-East Fife, Kirkcaldy and Dunfermline. Dunfermline covers Dunfermline and West Fife and includes the postcodes KY4, KY5, KY11 and KY12. The tourism figures for the Dunfermline area are therefore included within the Dunfermline and West Fife totals.
- In 2010 the Dunfermline area recorded a total of 1.5 million tourist days and 800,900 visitors.
- Total tourism expenditure in the Dunfermline area in 2010 was £60.2 million. This gives an average daily spend of £39.60 per tourist day.
- Around 1,370 full-time equivalents were employed in tourism-related jobs in 2010.

The Economic Impact of Tourism

Dunfermline and West Fife contribute £60.2m annually to tourism in Fife. This represents 22% of the Fife total. The revenue generated by tourist categories in Dunfermline and West Fife for 2010 are summarised in Figure 11.

Figure 11: Revenue by Tourist Categories in 2010



Source: STEAM 2010

The serviced accommodation category provides the highest proportion of economic impact at 41.1%. The peak months for expenditure are July and August.

Accommodation

- The Dunfermline area has a good mix and standard of visitor accommodation from small family run guest houses through to large hotels. There are 29 accommodation establishments in the Dunfermline area providing almost 900 bedspaces.

Main Visitor Attractions

- Pittencrieff Park – the centre point is the Pittencrieff House visitor centre. The park also has an art deco bandstand and children's playground.
- The annual Bruce Festival is held in the city's Pittencrieff Park during August. The festival celebrates the life, myth and legend of King Robert the Bruce.
- Golf at Forrester Park Resort situated in 350 acres of parkland. Other golf clubs include Pitreavie Golf Club and Dunfermline Golf Club.
- The Scottish National Water Ski Centre at Townhill Country Park features a state-of-the-art purpose built arena and training facility with two sheltered ski arenas, a slalom course, a tournament course and a wakeboard slider. It is considered to be one of the finest ski resources in Europe, and is Scotland's national training site.
- Dunfermline Abbey and Palace – this 12th century Abbey, the burial place of King Robert the Bruce and 7 other Kings of Scotland, attracts 20,000 – 30,000 visitors per annum. The palace was built in the 14th century.
- St Margaret's Cave – situated below Chalmers Street car park.

- Andrew Carnegie Birthplace Museum - the cottage where Carnegie was born, a working loom, cafe and shop.
- Abbot House - a venue for cultural and heritage related events.
- Two performing arts / live music venues in Dunfermline: the 1930s Carnegie Hall, and the recently renovated Alhambra Theatre.
- The Fife Leisure Park has over 17 leisure-based operators including Bowlplex, a health club, a number of restaurants and the Odeon Cinema.

LONG-TERM REGENERATION POTENTIAL

Dunfermline City Centre

- The first phase of a £10 million project to improve Dunfermline City Centre is expected to get underway in 2011. The regeneration scheme, which will take up to three years to deliver, will include the resurfacing of roads and pavements with natural stone, a redesigned street layout for better accessibility, and the installation of public art.

Tourism

- The Dunfermline Local Tourist Association aims to enhance the Bruce and Winter Festivals to tackle the seasonality of visitors to Dunfermline. The Alhambra Theatre plans to exceed 100,000 visitors during 2011/12. The Kingsgate Shopping Centre is exceeding its visitor numbers developing into a destination attracting shoppers from outside the town.

Dunfermline Eastern Expansion

- The investments by Amazon and Shepherd Offshore present opportunity not just in relation to the current investment but for the longer term availability of these key employment sites to support further business investment and job creation .

FURTHER INFORMATION

Further information is available from www.fifedirect.org.uk

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Date of Publication: December 2011