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Our three-year programme

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Floating wind potential The value of nature



Crown Estate Scotland Oighreachd a' Chrùin Alba

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#### JOIN OUR MAILING LIST

To receive occasional email updates on our work and the progress of the Scottish Crown Estate Bill, please email **media@crownestatescotland.com** 



### Foreword

AMANDA BRYAN Chair, Crown Estate Scotland

Welcome to our Spring Bulletin packed with news, updates and insights into what we and our tenants have been doing across the seabed, land and property we are trusted to manage.

Strategic research into the economic potential of floating wind and a pioneering project to 'value' nature are just some of the stories that feature in this edition.

#### Our team works with others to innovate with land and property to create wider prosperity for Scotland.

Many tenants and stakeholders kindly gave their time recently to take part in independent surveys and research so that we know what we do well – and what we can improve. We will be publishing key findings (and follow up actions) shortly but in the meantime, I'm proud to say that a number fed back on the high levels of professionalism and expertise among the staff.

Another message that has come across clearly is that many are keen to know more about the

future of Crown Estate Scotland and any possible changes to what we do and how we do it.

Importantly, Scottish Government recently laid a Bill in Parliament setting out proposed long-term management arrangements for Crown Estate assets. The Bill outlines the continuing role of Crown Estate Scotland as manager while enabling councils and communities to directly manage specific assets on a case-by-case basis.

The legislation is an important step forward in setting out our long-term future. Coming to the end of our first year of operation, we have increased engagement with communities, local authorities and other partners and ensured continuity for our tenants.

While the Bill is examined by MSPs and there are big challenges facing tenants and their sectors, not least Brexit, our team's work with others to innovate with land and property to create wider prosperity for Scotland and deliver excellent customer service, will continue apace. I look forward to more meetings and discussions with you in the months to come.



# Helping communities manage assets

n March and April we will be consulting on a new scheme that will enable local authorities, development trusts and other bodies to apply to manage assets in their local area.

#### It's an exciting way to explore and test how communities can have more say over how Crown land and property is managed.

Ronnie Quinn, Chief Executive, Crown Estate Scotland

Our three-year corporate plan sets out our commitment to test different methods of managing assets through a range of pilot projects, empowering communities and giving local people more say in decisions that impact the land, coastline and sea near where they live. Last year we appointed Argyll-based Sarah Brown of C2W Consulting to support us by providing advice, defining criteria for selecting pilots and ensuring the scheme is informed by consultation and engagement.

Ronnie Quinn, Chief Executive of Crown Estate Scotland said: "It's an exciting way to explore and test how communities can have more say over how Crown land and property is managed. We will launch a final process later this year to give communities, local authorities and others a chance to put forward their proposals. We are keen to hear about potential projects that are designed to enhance economic, social and / or environmental well-being."

We would like to thank everyone who has already contributed their ideas. We are keen to ensure that the final scheme – the criteria and process – are robust and transparent.

# **Talking with our tenants**

big thank you to all tenants who completed our recent survey on our current and future working arrangements.

The survey was issued to 1,670 coastal, agricultural, residential and aquaculture tenants, and the feedback we have received will ensure that we are aware of any concerns tenants may have, and enable us to offer the best possible support.

Andy Wells, Head of Property, said, "Our tenants are at the heart of what we do and this survey was a way of gathering opinion and feedback, so that we know what tenants like about our service and what we may try to change."

The consultation focused on communication, levels of service and what challenges their business face more generally.

# Our tenants are at the heart of what we do.

The study is being conducted by Research Resource, an independent research organisation. A summary of key results will be made available on our website in Spring 2018.









Tenants took par in our survey Whitehill tenant farmer Hew Hunter and his family Credit: Colin Hattersley

# **Three-year programme launched**

n October last year, we launched our first three-year programme. The plan outlines our pledge to innovate with land and property to create prosperity for Scotland and its communities. It sets out how we will grow revenue and the value of the estate, engage openly and effectively and innovate through, for example, supporting new areas of economic growth and encouraging local organisations to manage assets.

way including making more

information and data public

## Some of our key commitments are:



Supporting shellfish, marine trou and seaweed cultivation

Helping angling associations in maintaining or increasing numbers of stretches of river let

# **Out and about** across Scotland

ur seven-strong Crown Estate Scotland Board has committed to hold three Board meetings a year away from its Edinburgh base. To date in 2017/18, meetings have taken place in Argull & Bute and Shetland, and the Board will be in Dumfries and Galloway in March.

As part of our commitment to openness and transparency, we publish all papers and minute of Board meetings except when there is a clear statutory / legal reason to not publish. This is usually when the information is commercially / personally sensitive, or it relates to the formulation of government policy.



**Dumfries & Gallowau** 

#### **FIND OUT MORE**

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Our 3-year plan is at www.crownestatescotland.com Board papers are at www.crownestatescotland. com/about-us/structure-governance.

# **Wired and ready**

TOM MALLOWS Development Manager, Crown Estate Scotland

round Scotland's coast there are almost 47,000km of underwater cables, supplying broadband and other telecommunications links.

Crown Estate Scotland manages the property rights to the seabed including the rights to lay and maintain cables.

As competition for space increases around Europe, Scotland is well positioned to attract investment in areas such as data centres connected by international subsea cables, alongside key advantages such as abundant cooling air and water, a skilled workforce, proximity to key European mainland populations, and a benign geological environment.

And although 47,000km is already enough cable to encircle the globe, there is still plenty of opportunity, from expansion of community broadband networks through to multinational technology development.



While cable broadband has dominated discussion in recent years, the first telecommunications cable – a copper type to carry telegraph data - in UK waters was laid between England and France in 1850.

Nowadays there are almost 380 either operational or planned international subsea communications cables around the world.

Here in Scotland, in addition to the numerous smaller and shorter distance cables connecting remote and island communities or crossing rivers and estuaries, there are three international cables coming onshore and three connecting other countries that 'transit' through our waters. There are also five 'national scale' cables making landfall in parts of Scotland and Northern Ireland.

The BT Highlands & Islands broadband submarine cable system comprises a further 20 cables around Scotland.

# Did you know: ⊶

99% 99.7% 7% 2x

Subsea telecoms cables transmit between 97% and 99% of the world's data at any one time.

Modern telecoms cables can transmit data at 99.7% the speed of light (over 1 billion kilometres per hour!).

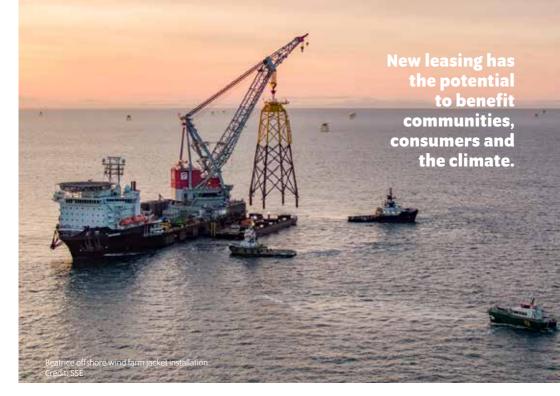
The entire range of communications satellites currently orbiting the earth is estimated to have only 7% of the USA's total data usage capacity.

The total bandwidth required of the world's subsea cables doubled between 2014 and 2016.









# New offshore wind leasing on the horizon

D iscussions are underway with industry, government and interested organisations to prepare for potential new offshore wind leasing. The proposed new leasing could see more seabed used by developers to build commercial-scale (100MW+) floating and / or fixed offshore wind farms.

It follows the UK Government's announcement of Contracts for Difference in September 2017. This was followed in December 2017 by Scottish Government's Energy Strategy which references Crown Estate Scotland working with Marine Scotland to understand the potential for deployment of offshore wind in the late 2020s and beyond.

Current offshore wind projects in waters around Scotland includes 211MW in operation (including Robin Rigg and Hywind Scotland) and 680MW in construction (including Beatrice and Aberdeen European Offshore Wind Deployment Centre). John Robertson, Senior Development Manager at Crown Estate Scotland, said "We have now started to consider if and how to issue new leasing rights for commercial-scale offshore wind projects. This will include speaking to local, Scottish and UK stakeholders to understand their views on our proposed approach.

"The waters around Scotland have fantastic potential, particularly for developments in deeper waters. With costs being lowered and jobs created throughout the supply chain, new leasing has the potential to benefit communities, consumers and the climate."

It can take developers around nine years from securing an initial agreement for an area of seabed, taking their proposal through preplanning and consenting into construction, to then start generating electricity.



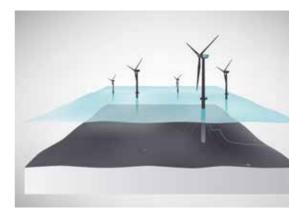
# **Potential of floating wind**

The potential economic benefits of more floating wind projects in Scotland is to be examined by a Crown Estate Scotlandled study. The work by Offshore Renewable Energy Catapult may help pave the way for UK Government to make new policy decisions to support industry growth.

#### Scottish waters are deeper and closer to shore, providing the ideal opportunity for expanding the offshore wind industry.

It follows the world's first floating wind farm, Hywind Scotland, located off the north-east of Scotland, starting to produce energy in October 2017. There are also a further two test and demonstration scale projects with planning consent from Marine Scotland and seabed rights from Crown Estate Scotland.

Floating wind has significant global potential, enabling access to high wind resource in deep waters, compared to fixed wind which can often be too expensive to build in deeper waters where wind conditions are often better. In particular, Scottish waters are deeper closer to shore, providing the ideal opportunity for expanding the offshore wind industry and taking a global lead in innovating with new technologies.



Sian Wilson, Senior Development Manager at Crown Estate Scotland said, "We want to find out the scale of the economic benefits – jobs, supply chain and exports – from growing the Scottish floating wind industry. The results of this study will help UK government and others take policy decisions on how to support development."

# Offshore data accessible for the first time

**S** patial data relating to Crown Estate Scotland's offshore assets is now freely available online.

The data covers infrastructure projects and undersea cabling and can be used by a range of organisations, from oil and gas companies to consultancies and educational institutes.

Geographic and attribute data is available for all of Crown Estate Scotland's offshore agreements, including the Beatrice Offshore Wind Farm (currently under construction in the Moray Firth) and Hywind Scotland – the world's first floating wind farm, located off the north-east coast.

John Robertson, Senior Development Manager said: "As a land and asset manager, Crown Estate Scotland has a responsibility to maintain authoritative records about the status of the land and seabed we manage. We also want to work openly and transparently.

"With a number of both large scale and smaller projects already in Scottish waters, this data will give companies working in the sector the chance to scope out other opportunities to work with Crown Estate Scotland and our partners." This data will give companies working in the sector the chance to scope out other opportunities to work with Crown Estate Scotland and our partners.

#### **FIND OUT MORE**

The spatial data is available at www.crownestatescotland.com/maps-andpublications#jump-Marine. An interactive map of agreements on land, coastline and seabed can be viewed at www.crownestatescotland.com/the-assets/map





#### **FIND OUT MORE**

The study can be found at www.crownestatescotland.com/ maps-and-publications download/118

# Research supports shellfish farming

he Association of Scottish Shellfish Growers (ASSG), with support from Crown Estate Scotland, has completed a study into the economic challenges and potential of taking a 'loch-wide' approach for shellfish growers.

The economic research identifies if collaborative investment, for example in vessels, harvesting equipment and infrastructure, might contribute to the growth of shellfish operations in Scotland.

# A better understanding of a viable shellfish industry is vital if Scotland is to realise the undoubted potential of this sector.

Aquaculture Operations Manager, Alex Adrian said: "The Shellfish Critical Mass Modelling study provides useful guidance for planners and other authorities on what might be needed to support the growth of shellfish farming in Scotland.

"A better understanding of economic drivers and challenges of a viable shellfish industry and how this translates into the nature of businesses and developments is vital if Scotland is to realise the undoubted potential of this sector."

A second element of the work explored what measures may encourage growth of the sector, including how local communities might be involved.

Dr Nick Lake, ASSG Chief Executive Officer said: "Our members offered first hand production and business information to inform and provide detailed considerations as to how joint working could benefit both individual businesses and the wider community. The ASSG continues to promote the expansion of shellfish cultivation in Scotland as a highly sustainable and economically beneficial activity within some of the most remote Scottish locations."

## Aberdeen Harbour expansion underway

onstruction of Aberdeen Harbour Board's £350 million development of additional facilities in Nigg Bay, to the south of the existing harbour, is now underway.

The development, due to be completed in 2020, will include 1,400m of new quay, with a water depth of up to 10.5m. It will also create an additional 125,000sqm of lay-down area, making it the largest port in Scotland in terms of berthage.

It is expected that the expansion will support the creation of 2,300 jobs by 2026, as well as providing new and existing customers increased opportunity in decommissioning activity, cruise tourism and the renewables market in Scotland.

Andy Wells, Head of Property at Crown Estate Scotland, worked closely with the Harbour Board to provide the seabed lease and dredging agreements.

He said: "It is fantastic to see the progress made at Nigg Bay, with the expansion set to drive economic growth and job creation in Aberdeen and its surrounding communities.

"Aberdeen Harbour is an example of how our team works closely with local authorities, businesses, coastal communities and other partners to give occupation rights to Crown foreshore and seabed for projects providing marine infrastructure around Scotland."

Colin Parker, Chief Executive of Aberdeen Harbour Board, said: "The South Harbour development is of strategic importance, not just to Aberdeen but to the whole of Scotland and internationally. The expansion allows commercial diversification and future-proofs the harbour, enabling us to support large scale marine operations from a range of industries, including decommissioning and cruise."



Aberdeen harbour expansion Credit: Aberdeen Harbour Board



## **Tobermory takes control**

**C** rown Estate Scotland has helped one of its most valued community partners to take on operation of the town's harbour.

A Harbour Empowerment Order allows Tobermory Harbour Association to manage the facilities on behalf of residents and businesses on Mull. The not-for-profit community enterprise said it was a "huge step forward" which would benefit harbour users.

Andy Wells, Head of Property, said, "This is a real milestone for the Tobermory community. The team there has put in a huge amount of work and energy over the last few years, with Crown Estate supporting whenever possible, and we are thrilled that they can now press ahead with expanding facilities which will deliver wider benefits to local communities and businesses."

Crown Estate Scotland has supported the Association's work as part of our drive to enable local people to be more involved in managing assets in their area.



Tobermory Harbour Association Chairman Brian Swinbanks said: "The new Harbour Authority will be a community-run and community-driven organisation. It will be dedicated to build facilities for all, benefiting local boat owners, fishermen and charter boats, our wonderful island of Mull and the wider west coast of Scotland."

# Seeing value in nature

**C** rown Estate Scotland tenant farmers are taking part in a pioneering project to assess the value of natural assets to help them make decisions that will protect the environment and the land that they work on.

The pilot will apply the international Natural Capital Protocol and will cover the entire 23,000 hectare Glenlivet Estate (with its range of farming and leisure activities), an upland tenant farm on that same estate, and a lowland arable business on the Fochabers Estate.

#### Using the Protocol enables businesses to make more sustainable decisions.

'Natural Capital' covers natural assets including geology, soil, air, water and all living things, which provide humans with a wide range of services. These include the food we eat, the water we drink and the plant materials we use for fuel, building materials and medicines, as well as climate regulation and natural flood defences provided by forests, the billions of tonnes of carbon stored by peatlands, and the pollination of crops by insects.

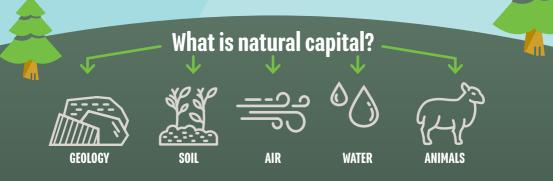
The trial will help Crown Estate Scotland and project partners identify if the Natural Capital



Protocol provides a practical way of helping rural businesses understand their impact and dependency on the natural environment.

Policy and Planning Manager, Ciorstaidh Couston, said "It's a toolkit which helps businesses identify how natural resources contribute to their longterm profitably and how their activities impact those resources. Using the Protocol enables businesses to make more sustainable decisions and account for the elements of nature that provide important 'services' to people."

Cumulus Consultants are carrying out the pilot project, which runs until March 2018, working alongside Scottish Natural Heritage, Scottish Environment Protection Agency, Scottish Land & Estates, the Scottish Forum on Natural Capital, the James Hutton Institute and SRUC. The pilot project is funded by Crown Estate Scotland, SNH and SEPA.



Natural assets including geology, soil, air, water and all living things, which provide humans with a wide range of services.

# **Biosecurity plays vital role**

n partnership with the Moredun Research Institute, Crown Estate Scotland has been working to promote biosecurity to improve the control of livestock diseases affecting cattle and sheep, diseases which cost farmers millions of pounds each year.

Biosecurity is one of the most important factors of livestock disease control. Although producers are well aware of the commercial benefits of healthy animals, the challenge is to provide clear information that helps farmers make the right decisions.



View a short animation developed by Moredun about how to prevent sheep scab and BVD at

www.vimeo.com/221440637/0be2ef1aaa

#### **Big 5 biosecurity checklist:**

Livestock movement	$\checkmark$
Quarantine	$\checkmark$
Diagnostic tests and preventative vaccines	V
Hygiene	$\checkmark$
Health plans	$\checkmark$



# Moredun visit

rown Estate Scotland has an ongoing relationship with Moredun, working with it on various subjects relating to improved farming methods and livestock health. Her Royal Highness, The Princess Royal, recently visited Moredun Research Institute near Edinburgh to celebrate its unique partnership with the farming industry and met with a number of Crown Estate Scotland's next generation farmers.

# Committed to biodiversity

rown Estate Scotland has worked with SNH to develop a Biodiversity Statement which sets out what the business will do over the next few years to help promote and protect a healthy natural environment.

This Statement outlines the work we will do on ecosystem restoration, woodland management, habitat and species management, investment in natural capital and the educational work delivered through our ranger service on the Glenlivet estate.

#### **FIND OUT MORE**



Our Biodiversity Statement is at www.crownestatescotland. com/maps-and-publications/ download/146

# **RSABI is here to help**

R SABI helps hundreds of people every year by providing emotional, practical and financial support to those in farming, crofting and growing in Scotland.

The charity offers financial support and practical advice, including independent business advice through the Scottish Government to over 600 individuals and families every year.

A Help for Heating Grant is also currently on offer. Those that meet the requirements may be entitled to £300 towards the cost of keeping their home warm during the winter months.



#### **FIND OUT MORE**



For more information contact 0300 111 4166 or visit the RSABI website **www.rsabi.org.uk** 

# **Advice service for farmers**

Advisory Service (FAS) helps new farmers and crofters grow their business through a range of business development support and oneto-one advisory services.



New farmers or crofters are entitled to access a range of subsidised expert business support – worth up to a total of  $\pounds 2,200$  – to help increase the profitability and sustainability of their business. FAS can also arrange for an experienced farm adviser to visit your business, perform a critical assessment and offer expert advice on a range of farming-related topics, tailored to specific business needs.

#### My mentor helped me with getting infrastructure right, establishing contacts and improving my knowledge.

#### **Iain Withers, Farmer**

After seeking help from FAS to develop specific aspects of his business, new farmer lain Withers of Narrowboat Farm has increased the profitability and sustainability of his farm.



# **Conservation volunteers set to go**

a great opportunity is available at Glenlivet for anyone with a love of nature and time to offer. A new volunteer group has been set up to carry out a range of supervised practical tasks on the 23,000 hectare estate.

We have had wildlife groups, heritage enthusiasts and others who have helped us make the most of this great region and what it has to offer.

The group meets on the first Wednesday of every month, working on various tasks between 10am and 4pm. Group members need to be aged 18 or over.

Vicky Hilton, Countryside Manager, said, "Glenlivet and the wider community have welcomed many volunteers over the years. We have had wildlife groups, heritage enthusiasts and others who have helped us make the most of this great region and what it has to offer. "This group is a very practical way to help keep Glenlivet in tip top condition, and members will be learning from the Crown Estate Scotland team as they build, repair and conserve. The work is hands-on and varied, but we will provide training and supervision where needed. Tasks will take place across the Estate and also include some days maintaining the BikeGlenlivet mountain bike trails."



Anyone looking for more information on the group can contact Karen on karen.smith@crownestatescotland.com

# Skunk cabbage gets junked

G arden escapee American skunk cabbage is set to be eradicated from the Glenlivet Estate with the help of the Spey Fishery Board and Cairngorms Volunteer Rangers.

The highly invasive non-native species was discovered alongside a burn in boggy woodland. American skunk cabbage spreads via seeds down water courses and can out-compete native plants in damp habitats.

The Glenlivet Estate team enlisted the help of the Cairngorms Volunteer Rangers to remove the plants. It is expected that there will be regrowth for several years, which will need to be treated with pesticide.

Glenlivet supports at least 23 'priority species of conservation concern' so it is essential that we remove any non-native invasive species. We've been greatly helped by the volunteers and the Fishery Board.



The Spey Fishery Board provided specialist advice on eradicating the plants and will help with pesticide application, likely to be carried out during spring 2018.

Brian Shaw, Spey Fishery Board biologist, said, "It is essential to manage the spread of invasive non-native species, raising public awareness about their damaging effects. Rivers can be a good conduit for the spread of American skunk cabbage, so we were eager to work with Glenlivet Estate to control and remove the plant."

Vicky Hilton, Countryside Manager





# **Trails closure**

he mountain biking trails on the Glenlivet Estate are now temporarily closed to allow felling of infected trees with plans for partial reopening in time for Easter 2018.

The Blue trail will reopen on Friday 30 March, with the Red trail and new coaching area scheduled to open in the weeks following.

The trees infected with **Red Band Needle Blight** are either dead or dying, and the only option is to clear fell them. This will halt the spread of the infection to healthy trees on the Estate.

#### **Vicky Hilton, Countryside Manager**

The Glenlivet Estate Visitor Centre in Tomintoul remains open, as is the extensive network of walking trails across the Estate.

Vicky Hilton, Countryside Manager for the Glenlivet Estate, said: "The trees infected with Red Band Needle Blight are either dead or duing, and the only option is to clear fell them. This will halt the spread of the infection to healthy trees on the Estate."

The mountain bike trails have become one of the area's most popular attractions, with visitors attracted not just by the trails but by the quality food and refreshments offered by The Coffee Still Café. Although currently closed due to the works, café owners Dianne Dunlop and Steve Sacks will be returning with their great home-cooking from Easter 2018.





To keep up to date go to our Glenlivet website www.glenlivetestate.co.uk



# **Forest certification awarded**

rown Estate Scotland is certified under the forest certification schemes FSC® and PEFCTM.

In order to achieve certified status, the forests must meet independently verified standards that take social, environmental and sustainable business practices into account.

Certification was awarded following an audit in June 2017 by Soil Association Certification Forestry. It is accredited to audit and administer Forest Management Certificates on behalf of FSC® and PEFCTM.



Following accreditation, products such as timber can then carry the labels for FSC® and PEFCTM, providing consumers with the guarantee that it comes from a sustainably-managed forest. Other benefits to certification include increased product value and easier access to markets.

Forest Manager at Crown Estate Scotland, Nick Page, will work to ensure accreditation is maintained through continuous monitoring and re-inspection.

Nick joined the business in August 2017, and is responsible for managing Crown Estate woodlands across Scotland. He has over 21 years' experience in the forestry sector, with previous roles including Forestry Contracts Manager for Atholl Estates and 11 years as a self-employed forest manager and tree inspector.



## **Better conversations**

A project which helps businesses and communities to tackle difficult issues and decisions held a programme of meetings across the north and west Highlands.

Collaborative Scotland, an independent not for profit initiative promoting better dialogue in decision-making, travelled to some of the well-known North Coast 500 route in a speciallycommissioned 'Better Conversations Bus', provided by Rabbie's Tours.

The tour facilitated a series of free and open meetings and workshops in partnership with some of the region's most prominent civic organisations, including the University of the Highlands and Islands (UHI), the North Highlands Initiative (NHI), Highlands and Islands Enterprise (HIE), Crown Estate Scotland and North Coast 500 (NC500). Events along the way enabled constructive dialogue and encouraged people to consider what vision they have for their community and the country as a whole. Meetings for local businesses to consider how to reduce unhelpful disputes and have more effective business arrangements were also offered.

John Sturrock QC, Senior Mediator at Core Solutions Group and founder of Collaborative Scotland, said "We realise that there is so much to be gained, in personal, local and business relationships, when folk find common ground. Our bus tour will explore how local communities and businesses in areas of Scotland, that face unique socio-economic challenges and opportunities, can achieve even more by working together."

The Better Conversations Bus tour started in Dornoch and visited communities including Lairg, Brora, Wick, Thurso, Tongue, Durness, Kinlochber and concluded in Dingwall.



# Water supplies focus for maintenance team

very day is different for Willie Reid and his maintenance team on our Fochabers and Glenlivet Estates.

From fixing a tenants septic tank to digging soakaways, Supervisor Willie and maintenance staff Alistair Henderson and Gregor Henderson help maintain over 80 farms and 41 residential properties across 30,000 hectares of land.

In recent months the team have focused primarily on working with Moray Council to renew and upgrade private water supplies in line with the Water Intended for Human Consumption (Private Supplies) (Scotland) Regulations 2017, which came into force in October 2017. The main objective of the Regulations is to ensure the provision of clean, safe drinking water and to deliver significant health benefits to those using private water supplies.

Willie said "The majority of supplies in Glenlivet are private and come from springs, wells and boreholes and unlike public supplies are generally not treated to remove contamination.



We have therefore spent a lot of time this winter working to ensure as many supplies are upgraded or installed as possible.

"It's been a big advantage knowing the land and many of our tenants so well, and it allowed us to do lots of preparatory work in advance of enforcement of the regulations."

The team will continue to work closely with Moray Council over the coming months to complete the works.

Willie joined the business in 2011 and was promoted to Supervisor in 2015 and between the three staff in the team they have over 30 years' experience on the Estates.

#### **Head Office**

6 Bells Brae Edinburgh EH4 3BJ Tel. 0131 260 6070 enquiries@crownestatescotland.com

#### Glenlivet

Main Street Tomintoul, Banffshire AB37 9EX Tel: 01479 870 070 info@glenlivetestate.co.uk



@CrownEstateScot

www.glenlivetestate.co.uk www.crownestatescotland.com

#### JOIN OUR MAILING LIST

To receive occasional email updates on our work and the progress of the Scottish Crown Estate Bill, please email media@crownestatescotland.com