Bowdun Offshore Wind Farm, Offshore EIA Report

Volume 3, Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore)

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Glossary

Defined term	Definition
Additional Mitigation	Also referred to as secondary mitigation which is defined by The Institute of Sustainability and Environmental Professionals (ISEP) (formerly Institute of Environmental Management and Assessment (IEMA)) as: Actions that will require further activity in order to achieve the anticipated outcome. These may be imposed as part of the planning consent, or through inclusion in the Environmental Impact Assessment (EIA) Report (sic).
Cumulative Effects	The effects of the Project assessed together with effects from one or more different projects on the same receptor/resource.
Effect	Term used to express the consequence of an impact i.e. the result of change or changes on specific environmental resources or receptors. The significance of an effect is determined by correlating the magnitude of the impact with the importance, or sensitivity of the receptor or resource in accordance with defined significance criteria.
Embedded Mitigation	Measures that are adopted as part of the Project and therefore assessed within the EIA. The proposed approach for the EIA for the Project is that embedded mitigation includes both primary mitigation and tertiary mitigation. These are defined by ISEP as follows: Primary: Modifications to the location or design of the development made during the pre-application phase that are an inherent part of the project, and do not require additional action to be taken. Tertiary: Actions that would occur with or without input from the EIA feeding into the design process. These include actions that will be undertaken to meet other existing legislative requirements, or actions that are considered to be standard practices used to manage commonly occurring environmental effects.
Environmental Impact Assessment (EIA)	Process for the assessment of the likely significant environmental effects of a project on the physical, biological, and human environment during construction, Operation and Maintenance (O&M) and decommissioning.
Gross Value Added (GVA)	Measures the contribution of individual companies, industries, and regions to the national economy. This figure is presented at current prices, reflecting the total value generated by the economy/sector after subtracting intermediate consumption (i.e., the cost of inputs used in production).
Impact	A change caused by an action that occurs during a project's lifetime.
Landfall	The area in which the Offshore Export Cables make Landfall and is also the transitional area between the Offshore Transmission Assets and the Onshore Transmission Assets. Located in the Intertidal Area (see definition above) at Bay of Benholm.
Local Authority	Local Authority is a body empowered by law to exercise various statutory functions for a particular area of the United Kingdom. Functions will cover planning, roads/highways, environmental health, flood protection, environment/ecology, cultural heritage and waste.

Defined term	Definition
Mitigation	Measures to avoid, prevent, reduce or control effects on the environment. See also definitions for Embedded Mitigation and Additional Mitigation.
Onshore	Area Landward of Mean Low Water Springs.
Onshore Infrastructure	All of the Project components landward of the MLWS including the Onshore Export Cables and the onshore Substation.
Operations and Maintenance (O&M)	Includes routing inspections, repairs and replacement of infrastructure and equipment associated with the Project.
Project (the)	An overarching term for the Bowdun Offshore Wind Farm (Bowdun OWF) comprising the offshore and onshore infrastructure required to generate and transmit electricity from the Array Area to the onshore Grid Connection Point (GCP). The Project includes both the Offshore Generation Assets, the Offshore Transmission Assets and the Onshore Transmission Assets.
Study Area	For each environmental topic, the baseline environment will be characterised, and the potential environmental impacts will be described within a topic-specific 'study area'. The study areas are defined for each topic in the Onshore Scoping Report and are based on the maximum spatial extent across which potential impacts of the Project may be experienced by the relevant receptors (i.e., zone of Influence).
Substation	The onshore Substation which is part of the electrical transmission and distribution system. Substations transform voltage from high to low, or the reverse, by means of electrical transformers.
Thistle Wind Partners (TWP)	Company established for the development of the Project.
Wind Turbines	Structures comprising of a tubular tower, rotor blades, and a nacelle which houses the Wind Turbine generator.

Acronyms

Acronym	Definition
aFTE	Years of Employment
aGVA	Approximate Gross Value Added
CAPEX	Capital Expenditure
CEA	Cumulative Effects Assessment
CEMP	Construction Environmental Management Plan
CES	Crown Estate Scotland
CoCP	Code of Construction Practice
CTMP	Construction Traffic Management Plan
EIA	Environmental Impact Assessment
FMMCP	Fisheries Mitigation, Monitoring and Communication Plan
FTE	Jobs
GVA	Gross Value Added

Acronym	Definition
MAU	Maritime Analytical Unit
NSVMP	Navigational Safety and Vessel Management Plan
O&G	Oil and Gas
O&M	Operation and Maintenance
OMP	Operation and Maintenance Programme
OPEX	Operational Expenditure
SCDS	Supply Chain Development Statement
SIMD	Scottish Index of Multiple Deprivation
OWEC	Scottish Offshore Wind Energy Council
TTWA	Travel to Work Area
TWP	Thistle Wind Partners
UK	United Kingdom

Table of Units

Units	Definition
%	Percent
£	GBP
m	Million

1 Socio-economics, Tourism and Recreation

1.1 Introduction

1.1.1 This combined technical report presents the Socio-economic, Tourism and Recreation Impact Assessment for both the onshore and offshore elements of the Bowdun Offshore Wind Farm (the 'Project').

1.1.2 The following are assessed and reported in this Chapter:

- Impact on Gross Value Added (GVA), employment and supply chain.
- Demographic changes.
- Changes to demand for housing and other services.
- Changes to amenity of local public and private receptors (onshore only).
- Changes to tourism and recreation receptors.
- Socio-cultural impacts.

1.1.3 Separate assessments have been undertaken for Socio-Economics, Tourism and Recreation for the Environmental Impact Assessment (EIA) undertaken for the onshore and offshore elements of the Project. In December 2022, The Maritime Analytical Unit (MAU) published 'General Advice for Socioeconomic Impact Assessment' (MAU, 2022). This document summarised the draft guidance being prepared by MAU. One of the key recommendations is that the onshore and offshore elements of an offshore wind project are considered in the same assessment. The Bowdun OWF Offshore Scoping Report (BOWFL, 2024) confirmed that *'the combined impacts of all elements of the project will be considered in a stand-alone SEIA [Socio-Economic Impact Assessment] Report.'*

1.1.4 Accordingly, this report summarises the key findings of the onshore and offshore assessments and also considers the combined impacts of all elements of the Project.

1.1.5 This technical report makes reference to the following documents of the Offshore EIA Report and the Onshore EIA Report:

- Volume 1, Bowdun OWF Onshore EIA Report (BOWFL, 2025);
- Volume 2, Chapter 13: Commercial Fisheries;
- Volume 2, Chapter 14: Shipping and Navigation;
- Volume 2, Chapter 16: Infrastructure and Other Users;
- Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts; and
- Volume 2, Chapter 21: Cultural Heritage.

1.1.6 To support this assessment, relevant information is drawn from other technical chapters within the onshore and offshore EIA. These chapters provide baseline data and context for identifying receptors and understanding potential changes. The assessments referenced are listed in Table 1.1.

Table 1.1: Relevant Offshore and Onshore EIA Chapters for Assessment

Onshore Assessment	Offshore Assessment
Volume 1, Chapter 6: Land Use, Agriculture and Public Access	Volume 2, Chapter 13: Commercial Fisheries
Volume 1, Chapter 8: Landscape and Visual	Volume 2 Chapter 14: Shipping and Navigation
Volume 1, Chapter 12: Air Quality	Volume 2, Chapter 16: Infrastructure and Other Users
Volume 1, Chapter 13: Noise and Vibration	Volume 2 Chapter 18: Socio-Economics, Tourism and Recreation
Volume 1 Chapter 14: Traffic and Transport	Volume 2 Chapter 20: Seascape, Landscape and Visual Impacts
Volume 1 Chapter 16: Socio-Economics, Tourism and Recreation	Volume 2, Chapter 21: Cultural Heritage

1.1.7 The assessment is supported by the following appendices:

- Volume 2, Technical Appendix 16.1: Socio-Economics, Tourism and Recreation Baseline, BOWF Onshore EIA Report (BOWFL, 2025);
- Volume 3, Technical Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline, BOWF Offshore EIA Report;
- Volume 3, Technical Appendix 18.2: Socio-Economics Quantitative Assessment Methodology1, BOWF Offshore EIA Report

1.2 Socio-Economics, Tourism and Recreation Study Areas

1.2.1 The Socio-Economics, Tourism and Recreation Study Areas used in this assessment have been defined in line with the guidance on identification of impact areas for offshore developments published by the Scottish Government (Scottish Government, 2022a) and Guidance on assessing the socio-economic impacts of offshore wind farms (Glasson *et al*., 2020).

1.2.2 The guidance (Scottish Government, 2022a) identifies six principles for identifying study areas for offshore renewables and other marine developments. Amongst other factors, the principles require that the study area be defined based on socio-economic impacts 'epicentres', and that the impact areas are accountable, understandable, and connected where relevant. With cognisance of these principles, study areas for the subtopics included in this assessment were identified according to their individual attributes.

1.2.3 Table 1.2 describes the Study Areas for the assessment, which are shown on Figure A.1 and Figure A.2 in Annex A4.

[1] The quantitative assessment methodology was further developed for the offshore infrastructure and thus supersedes that of the onshore infrastructure.

Table 1.2: Study Areas and the Assessment Topics

Type of Impact and Study Area Description	Geography
Supply Chain and Investment Impacts	
The Study Area(s) have been defined to capture broader employment and GVA impacts that may arise through supply chain activity and investment in the Project. For this assessment, impacts are presented at the UK and Scotland-wide levels, as well as for the Regional Socio-Economics Study Area. The Regional Socio-Economics Study Area comprises the local economies of Aberdeenshire, Aberdeen City, and Angus. The Regional Socio-Economics Study Area is considered an impact epicentre, reflecting the location of suppliers with the required expertise as well as the local authority areas where the Applicant has committed to locating an O&M port.	UK Scotland Regional Socio-Economics Study Area - Aberdeenshire, Aberdeen City, Angus
Wider Socio-Economic, Tourism and Recreation Impacts	
Demographics	
Impacts on demographics are expected to arise primarily through economic mechanisms—particularly labour movement and construction and O&M activity associated with the Project. For the offshore assessment, the local authorities in which potential port locations would be situated are the most likely to experience demographic changes arising from labour movement. As the C&M and decommissioning port locations have not yet been selected, a more granular study area cannot be defined for these phases. For the O&M phase, changes in demographics were assessed based on an indicative urban and rural port scenario in Aberdeenshire and Angus, where the Applicant has committed to locating an O&M port. For the onshore assessment, the demographics study area utilises the labour catchment area associated with the location of the Project, defined using the Office for National Statistics Travel to Work Areas (TTWAs)[2]. The onshore component of the Project is located within the Aberdeen TTWA, a large area that includes Aberdeen City and the majority of Aberdeenshire. Data on demographics has been gathered for the administrative areas of Aberdeenshire, Aberdeen City, and the 2022 Electoral Wards areas of Mearns and Stonehaven and Lower Deeside. It was possible to define a more granular study area for the onshore assessment as this has been based on the local authorities and Electoral Ward areas where the onshore infrastructure would be situated.	Offshore: Regional Socio-Economics Study Area (Aberdeenshire, Aberdeen City, Angus) Onshore: Aberdeenshire Aberdeen City Kincardine and Mearns Mearns and Stonehaven and Lower Deeside
Changes to demand for housing and local services	
For the onshore and offshore assessments, the study area for changes to demand for housing and local services is the same as that for demographic changes.	As above.
Changes to Tourism and Recreational Receptors	
The offshore and onshore assessments utilise the study areas for the relevant EIA topics in the identification of significant residual impacts to assess the impacts on key tourism and recreational receptors.	Tourism and Recreation Study Area – As noted in adjacent column.

[2] Travel to Work Areas (TTWA) have been developed across the UK to approximate self-contained labour market areas. They are areas where most people both live and work and therefore relatively few commuters cross a TTWA boundary on their way to work.

Type of Impact and Study Area Description	Geography
For the offshore assessment, relevant environmental impacts on land-based tourism and recreation receptors are derived from the following EIA chapters in the offshore assessment: Infrastructure and Other Users; Seascape, Landscape and Visual Impacts; and Cultural Heritage. Relevant environmental impacts on water-based receptors (marine recreation) are derived from the following EIA chapters: Shipping and Navigation, Infrastructure and Other Users, and Seascape, Landscape and Visual Impacts. The onshore assessment utilises the Study Areas for the relevant EIA topics in the identification of significant residual impacts on tourism and recreation receptors: Land Use, Agriculture and Public Access, Landscape and Visual, Air Quality, Noise and Vibration, and Traffic and Transport. All receptors identified in the assessments are based within Aberdeenshire and Aberdeen City, including cultural and recreational land-based tourism assets (onshore) in addition to coastal and marine tourism assets (offshore). Accordingly, these local authority areas are considered to be the impact epicentres for tourism and recreation.	
Socio-Cultural Impacts	
Socio-cultural impacts refer to the effects that a development or project may have on the social fabric, cultural identity, and everyday life of communities. These impacts can include changes in community cohesion, quality of life and wellbeing, and the character of local areas. Given that such effects are most directly experienced by people living closest to construction activity (at Landfall) and port activity, these areas are considered to be the impact epicentres. Since port locations have not yet been chosen, socio-cultural impacts related to the offshore assessment have been considered broadly in relation to urban and rural communities, including consideration of the Regional Socio-Economics Study Area for the O&M phase. The onshore assessment study area was defined at a more local level given that effects are most directly experienced by people living near the onshore infrastructure.	Offshore: Regional Socio-Economics Study Area (Aberdeenshire, Aberdeen City, Angus) Electoral Ward 2022 – Mearns (includes local settlements of Gourdon and Johnshaven) Onshore: Mearns and Stonehaven and Lower Deeside[3] (representative of local settlements such as Stonehaven, Drumlithie, Fourdon, Laurencekirk, Arbuthnott)
Changes to amenity of Public and Private Receptors (Onshore only)[4]	
The onshore assessment utilises the study areas for the relevant EIA topics in the identification of significant residual impacts: Land Use, Agriculture and Public Access, Landscape and Visual, Air Quality, Noise and Vibration and Traffic and Transport.	As per relevant EIA topic study areas.

[3] Where baseline data was not available at an Electoral Ward level, it was gathered for the Kincardine and Mearns committee area level.
[4] Amenity impacts occur from the presence of the onshore infrastructure and its proximity to communities and therefore are only assessed for this element of the Project.

Type of Impact and Study Area Description	Geography
Receptors for inclusion in the assessment have been identified within a 500m buffer from the Planning Permission in Principle (PPP) Application Boundary. This is in cognisance of the 500m buffer used for identifying community assets and paths as per the Land Use, Agriculture and Access assessment. Note that where significant residual impacts from the relevant topic chapters have been identified on receptors outside of this 500m, the study area has been extended accordingly to ensure these are appropriately captured.	

1.3 Legislative and Policy Context

1.3.1 The socio-economic, tourism and recreation assessment is informed by key UK, Scottish and regional policy frameworks that guide renewable energy development and its economic and community outcomes. These documents provide the basis for assessing potential impacts on employment, supply chains, GVA and wider socio-economic conditions. Table 1.3 provides a summary of the relevant policy documents. There is no legislation that directly defines the approach to assessing socio-economic, tourism and recreation effects; consequently, no legislative provisions are listed in the table.

Table 1.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy	Summary
UK Policy Context	
UK Government (2024) Strategy and Policy Statement for Energy Policy in Great Britain	Sets long-term direction for GB energy policy, covering security, affordability, and clean energy transition.
UK Government (2024) Clean Power 2030: Action Plan – A New Era of Clean Electricity	Outlines actions to accelerate deployment of low-carbon electricity to reach a fully decarbonised power system by 2030.
UK Government (2025) Modern Industrial Strategy	A national strategy aiming to boost productivity, innovation, and economic resilience, with a focus on green industries and advanced manufacturing.
UK Government (2025) Overarching National Policy Statement for Energy (EN-1)	Provides the policy framework for energy infrastructure planning decisions, supporting major low carbon energy projects.
UK Government (2026) Clean Power Targets	Sets statutory goals for renewable and low-carbon electricity generation by 2030 and 2035.
UK Government (2019) Offshore Wind Sector Deal	A partnership between government and industry to grow UK offshore wind capacity, jobs, and supply chain capabilities.
UK Government (2021) Build Back Better: Our Plan for Growth	A post-pandemic economic plan focusing on infrastructure investment, skills, and innovation, including commitments to net zero.
RenewableUK (2024) Offshore Wind Industrial Growth Plan	A roadmap to expand the UK offshore wind supply chain and workforce to support rapid sector growth.

Policy	Summary
Scottish Policy Context	
Scottish Government (2020) Offshore Wind Policy Statement	Sets Scotland's strategic approach to offshore wind development, including environmental, supply chain, and economic priorities.
Scottish Government (2020) Sectoral Marine Plan for Offshore Wind Energy	Identifies spatial areas suitable for offshore wind development in Scottish waters.
Scottish Government (2024) Offshore Wind Focus	A refreshed strategy to accelerate offshore wind deployment, investment, and local economic benefits in Scotland.
Draft Energy Strategy & Just Transition Plan (2023)	Proposes Scotland's pathway to net-zero energy while ensuring a fair transition for workers and communities.
Scottish Government (2020) Climate Emergency Skills Action Plan 2020–2025	Outlines skills and training actions needed to support Scotland's transition to a low-carbon economy.
Scottish Enterprise (2024) Net Zero Framework for Action 2024–2025	Outlines business support priorities for Scotland's net-zero economy.
Scotland's National Strategy for Economic Transformation (2022)	A 10-year plan to improve productivity, innovation, and green economic performance.
Scotland's National Performance Framework	Scotland's overarching outcomes framework for wellbeing and sustainability.
Scottish Tourism Alliance (2020) Scotland Outlook 2030 – Responsible Tourism for a Sustainable Future	Strategy for sustainable and inclusive growth in Scottish tourism.
Programme for Government 2025–26: Building the Best Future for Scotland	Annual plan setting government priorities for economy, net zero, and public services.
Scottish Government (2023) National Planning Framework 4	The national spatial strategy guiding land use planning, prioritising climate resilience, nature restoration, and sustainable development.
Regional Policy Context	
InvestAberdeen (2024) Regional Economic Strategy: A Sustainable Economic Future for the North East	Economic diversification strategy centred on innovation and renewable energy.
Skills Development Scotland (2018) Regional Skills Strategy – Aberdeen City & Shire	Identifies regional skills needs and workforce development priorities.
VisitAberdeenshire (2022) Destination Aberdeen & Aberdeenshire: A Framework for Growth 2022–2030	Tourism strategy focusing on sustainable growth and visitor experience.
Angus Council (2016) Angus Local Development Plan	Land-use planning framework for development, environment, and infrastructure in Angus.
Aberdeenshire Council (2023) Local Development Plan	Planning policy guiding sustainable spatial development in Aberdeenshire.
Aberdeenshire Council (2024) Local Housing Strategy 2024–2029	Housing strategy addressing affordability, energy efficiency, and community needs.

Policy	Summary
Aberdeenshire Council (2024) Economic Development Service Strategy 2024–2029	Strategy for economic diversification and support for local businesses.
Aberdeen City Council (2023) Local Development Plan	Spatial development policy and planning guidance for Aberdeen.
Aberdeen City Council (2025) Local Housing Strategy 2025–2030	Housing priorities including affordability, quality, and climate resilience.
Local policy context	
Stonehaven and District Community Council (2024) Local Place Plan	Community-developed plan outlining local priorities for land use and amenities.
Gourdon Community Action Plan (2017)	Part of Aberdeenshire's rural partnerships framework and aiming to guide development actions in the community for up to three years.

1.4 Consultation

1.4.1 The approach to consultation for the Proposed Development is set out in Volume 1, Chapter 5: Consultation and Engagement. A summary of the issues raised during consultation activities undertaken to date specific to socio-economics, tourism and recreation is presented in both the onshore and offshore assessments, together with how these issues have been considered in the production of this assessment. Further detail is presented within Volume 1, Chapter 5: Consultation and Engagement, Volume 3, Technical Appendix 5.1: Consultation Logs and Volume 3, Technical Appendix 5.2: Pre-Application Consultation Report.

1.4.2 A summary of the key points raised through consultation relevant to this assessment is provided in Table 1.4.

Table 1.4: Key Issue Raised and Summary of Response

Consultee(s)	Key Issue Raised	Summary of response
MD-LOT, MAU, Scottish Ministers	Requirement for a full and robust socio-economic assessment using up-to-date data and recognised economic metrics.	A comprehensive SEIA has been undertaken covering construction, O&M and decommissioning phases. The assessment applies established economic concepts including deadweight, leakage, displacement and substitution, and has aimed to use the most current available data sources at the time of writing.
MD-LOT, MAU, Scottish Ministers	Need to define geographic areas and epicentres of socio-economic impact, including port-based scenarios.	Study areas and epicentres of impact are set out in Section 1.2. As port locations are not yet confirmed, the assessment employs two modelled scenarios, rural and urban port settings, to enable a robust evaluation of potential socio-economic change.
MAU	Expectation for meaningful stakeholder engagement and primary social research.	Stakeholder feedback has informed the structure and scope of the assessments, with community and sector-level issues captured through the PAC process and wider consultation.

Consultee(s)	Key Issue Raised	Summary of response
		Embedded monitoring includes a review of potential socio-economic impacts following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures. The Applicant will also retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.
Members of the Public (2025); Aberdeenshire Council Natural Environment Team (2024); Scottish Forestry (2024, 2025)	Importance of demonstrating local economic benefits and assessing impacts on employment, recreation, tourism, forestry and access.	The assessments quantify employment and GVA effects across all project phases and evaluates implications for tourism, recreation, public access and relevant land-use receptors. Forestry, arboricultural, and recreation issues highlighted during consultation have been addressed through other relevant EIA chapters and embedded Mitigation measures including the access management and the avoidance of Community Land, Community Assets, rights of way (Core Paths and long-distance footpaths), and replacement planting.

1.5 Data sources

1.5.1 Information on the baseline in the Socio-Economics, Tourism and Recreation Study Areas were collected through a detailed desktop review of existing studies and datasets. Key datasets and sources used are as follows:

- Annual Business Survey (Scottish Government)
- Annual Population Survey (Office for National Statistics)
- UK Labour Market Statistics (UK Parliament)
- UK and Scotland Input-Output Tables (Office for National Statistics; Scottish Government)
- Scotland's Marine Economic Statistics (Scottish Government)
- Gross Value Added (Office for National Statistics)
- Official Census and Labour Market Profiles (NOMIS)
- Regional Skills Assessments (Skills Development Scotland)
- Council Area Profiles (National Records of Scotland)
- Scottish Index of Multiple Deprivation (Scottish Government)
- Bowdun Offshore Windfarm Supply Chain Development Statement (BOWFL)
- Local authority housing strategies, land audits, local development plans (Aberdeenshire Council, Aberdeen City Council, Angus Council)
- Summary statistics for schools in Scotland (Scottish Government)

- Key performance metrics for NHS Boards (Scottish Parliament)
- Visit Scotland – Research Insights (Visit Scotland)
- Aberdeenshire and Aberdeen City Accommodation Audit (Visit Aberdeenshire)
- Offshore Wind Farm Developments – Public Perceptions Survey (Scottish Government)

1.5.2 A complete list of datasets and sources is provided in the socio-economics, tourism and recreation assessment chapters: Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025) and Volume 2, Chapter 18, Socio-Economics, Tourism and Recreation of this Offshore EIA Report.

1.6 Baseline Summary

1.6.1 This section provides the baseline context for the socio-economics, tourism and recreation combined assessment.

GVA and Employment

1.6.2 Table 1.5 presents the GVA and employment estimates for Scotland and the UK, along with all relevant local authorities in the Regional Socio-Economics Study Area for the Project.

Table 1.5: GVA and Employment Baseline (Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2023; Statista, 2025)

	Aberdeenshire	Aberdeen City	Angus	Regional Socio-Economics Study Area	Scotland	UK
GVA	£7.3 billion	£11.1 billion	£2.5 billion	£31.57 billion	£183.5 billion	£2,601.6 billion
Employment	135,500	123,500	51,800	310,800	2.7 million	34.2 million

1.6.3 Across Scotland, between 2022 and 2023, aGVA (GVA at basic prices) for the non-financial business economy decreased by £3.9 billion (-3.1%), driven by a decline in primary industries (which includes the oil and gas sector). In 2023, the Primary Industries sector accounted for an estimated £27.7 billion of total non-financial business economy aGVA (22.9%) (Scottish Government, 2025). Furthermore, GVA output varied between cities and rural areas. With 34% of Scotland's GVA (£183.5 billion – see Table 1.5) produced in larger cities in 2023, accumulated by 50,960 private sector businesses, whereas only 22% was produced in 'mainly rural' areas, despite a large number (59,815) of private sector businesses situated in these areas (Scottish Government, 2025).

1.6.4 Table 1.6 compares the labour market of the local authorities in the Regional Socio-Economics Study Area to national averages. Key indicators include employment rates, GVA per hours worked (GVA/h), Gross Domestic Product (GDP) per head, and the proportion of individuals with Regulated Qualifications

Framework Level 4 and above (RQF4+) qualifications, which are qualifications equivalent to a first year of a bachelor's degree.

Table 1.6: Labour Market Indicators (Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Employment Rate, 2025	74.4%	76.4 %	69.9%	74.4%
Economic Inactivity, 2025	22.7%	21.6%	26.7%	22.7%
Unemployment Rate, 2024	2.5%	3.9%	3.2%	3.7%
Gross Weekly Pay, by Place of Residence, 2025	£824.80	£781.70	£748.10	£775.6
Claimant Count, 2024	1.8%	3.2%	2.8%	3.1%
GVA/h, 2023	£37.3	£39.3	£39.9	£41.3
RQF4 and Above Qualifications, 2024	58.8%	62.4%	51.6%	53.7%
No Qualification, 2024	N/A	4.8%	8.6%	8.2%
GDP per head, 2023	£31,115	£52,583	£25,918	£37,192

1.6.5 Aberdeenshire and Aberdeen City have been economically tied to the oil and gas sector in recent decades, driving above average increases in GDP per head across the local authorities. Despite some recent signs of economic decline in the North-East, currently, GDP per head in Aberdeen City remains much higher the national average. Gross weekly pay and qualification levels in Aberdeen City and Aberdeenshire are also greater than Scottish averages. Whereas the labour markets of Angus are less strong, with employment rates below the Scottish average (Office for National Statistics, 2025).

1.6.6 The oil and gas industry is declining in Scotland. Between 2022 and 2023, aGVA (approximate GVA at basic prices) for the non-financial business economy decreased by £3.9 billion (-3.1%), driven by a decline in primary industries (Scottish Government, 2025). Due to the North-East's economic reliance on oil and gas, this will likely have a disproportionate impact on the region. Thus, the region is pursuing economic transition, becoming a hub for renewable energy, particularly offshore wind. Currently in 2026, there are 21,438 energy sector jobs in the 'central lowlands'[5], 5,030 of which are in Offshore Wind (Energy Skills Intelligence Hub, 2026). The Department for Energy Security and Net Zero (DESNZ) estimates that offshore wind could support up to 100,000 direct and indirect job across Great Britain by the end of the decade (UK Government, 2025).

[5] The Central Lowlands refers to the Midland Valley of Scotland, the country's most densely populated region extending between the Highland Boundary Fault and the Southern Uplands Fault, and encompassing major cities including Aberdeen, Glasgow, Edinburgh, Stirling, Perth and Dundee, where over the majority of Scotland's population and a large proportion of its industrial base are located.

1.6.7 In 2023, the Scottish marine economy generated £5.6 billion in aGVA, 3% of the total Scottish economy, and employed 75,900 people, accounting for 2.9% of total Scottish employment. Marine and coastal tourism employs the most people (46%) of all the marine economic sectors whilst support for oil and gas provides the largest contribution to aGVA (43%) (Scottish Government, 2025).

Population Baseline

1.6.8 Table 1.7 presents the population demographics for all relevant local authorities for the onshore and offshore assessments.

Table 1.7: Population Demographics in Regional Socio-Economics Study Area Local Authorities (Scottish Government, 2022; Office for National Statistics, 2025; National Records of Scotland, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Total Population, 2024	265,080	231,780	114,810	5.5m
% under 16	18.5	15.7	16	19.9
% aged 16-64	60.5	67.2	58.9	60.6
% aged 65+	21.0	17.1	25.1	19.5
Population Density /km^2	41.9	1227	52.41	16.0
Net Migration Rate, 2023-2024 (per 1000 population)	4.2	11.7	5.5	10.2
Net Annual Population Increase, 2023-2024	0.2%	1.1%	0.1%	0.7%

1.6.9 Aberdeenshire is the sixth most populus council area in Scotland. In 2023-24, Aberdeenshire was the council area with the second lowest net migration rate, out of all 32 council areas in Scotland. Alongside an ageing population, this has stalled the area's population growth. Similarly, Aberdeen City is experiencing a significant fall in net migration (National Records of Scotland, 2024).

1.6.10 As of 2022, the electoral wards of Mearns and Stonehaven and Lower Deeside – where Landfall and the onshore infrastructure is located - accounted for approximately 6% and 5.5% of Aberdeenshire's total estimated population, respectively (Aberdeenshire Council, 2023).

1.6.11 Population growth in Angus is very low, partly driven by falling net migration as well as its ageing population (National Records of Scotland, 2024).

Housing and Vacant Property

1.6.12 Table 1.8 presents housing data for the local authorities in the Regional Socio-Economic Study Area.

Table 1.8: Housing Baseline (Office for National Statistics, 2025; Scottish Government, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Average House Prices, 2025	£201,000	£136,000	£166,000	£193,000
Average Rental Prices, 2025	£858	£858	£821	£1,018
Vacancy Rate, 2024	4.4%	6.3%	4.3%	3.3%

1.6.13 A summary of the data is as follows:

- Aberdeenshire has a slightly greater vacancy rate and lower property rental prices than Scotland overall. House prices are higher than the Scotland average.
- Aberdeen City has the second highest level of vacant housing stock across Scotland and rental prices aligned with the Scotland average. House prices are much lower than the Scotland average.
- Angus has a slightly greater vacancy rate and lower property rental prices than Scotland overall. House prices are lower than the Scotland average.

Local Services

1.6.14 The pupil–teacher ratio (PTR) is a basic education metric that shows how many pupils (students) there are for every one teacher in a school or education system. PTR for the local authorities in the Regional Socio-Economics Study Area is shown in Table 1.9. A lower PTR indicates a higher capacity within schools, and vice versa.

Table 1.9: PTR for local authorities in the Regional Socio-Economics Study Area (Scottish Government, 2024)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Pupil-teacher ratio (2024)	13.8	14.1	13.0	13.3

1.6.15 Performance standards are set and agreed between the Scottish Government and National Health Service (NHS) Boards to provide assurance on NHS Scotland performance. These standards provide an indication of the level of capacity at which each health board is operating at. Key performance metrics for the NHS Boards in the Regional Socio-Economics Study Area are shown in Table 1.10. Geographies are slightly different, and the data is more aggregated, based on the areas covered by NHS Boards (i.e. Grampian includes Aberdeenshire, Aberdeen City, while Tayside includes Angus).

Table 1.10: Key performance metrics for NHS Boards in Regional Socio-Economics Study Area (Scottish Parliament, 2025)

	Grampian	Tayside	Scotland
A&E Estimate[1] (to 31/12/2025)	61.0%	82.3%	67.0%
GP 48 Hour Access Estimate[2] (to 31/03/2024)	85.7%	91.7%	89.1%
Diagnostic Waiting Times Estimate[3] (to 30/09/2025)	41.7%	59.1%	54.4%

[1]95% of people should be seen, admitted, discharged or transferred within 4 hours. NHS Boards should work towards 98.0%.

[2]GPs should provide 48-hour access to an appropriate member of the GP team for at least 90% of patients.

[3]All patients should receive key diagnostic tests/investigations within 6 weeks.

1.6.16 These performance indicators show that Tayside is meeting national standards for GP 48-hour access, while Grampian falls below the Scottish average. None of the NHS Boards are meeting the targets for accident and emergency, but Tayside performs better than Grampian in this area.

Tourism and Recreation

1.6.17 The tourism industry in Aberdeenshire and Aberdeen City is a significant contributor to the regional economy, and in 2024, Aberdeen ranked seventh in spending by overnight visitors in UK cities, with an average spend per overnight visit of £290 in 2024, totalling £396 million (Visit Scotland, n.d.).

1.6.18 Figures from independent research conducted by Global Tourism Solutions (GTS) using the Scottish Tourism Economic Activity Monitor (STEAM) model show an upward trajectory for the region's tourism sector. Key findings were as follows (Opportunity North East, 2025):

- The economic impact of tourism in Aberdeen City and Aberdeenshire increased year-on-year to £1.27 billion in 2024, a growth of 2% over 2023.
- The region attracted almost 3.7 million staying visitors in 2024, up 16.9% on 2023.
- The region welcomed over 2.59-million-day visitors, up 2.8% from 2023.
- Tourism directly employed 11,400 full-time equivalent jobs in 2024 across Aberdeen City and Aberdeenshire, an increase of 1.5% on 2023.

1.6.19 The area of Mearns and Stonehaven and Deeside, where Landfall and the Onshore Infrastructure is situated, is home to a range of natural and cultural tourism assets, such as castles and woodlands, and these are a primary motivator of travel for visitors. Visitors are predominantly domestic travellers and are generally characterised by an older age demographic (Visit Scotland, 2023).

1.6.20 Marine-related activities in Scotland are an important driver of tourism and recreation, for instance, recreational sailing, boating and motor cruising. Sailing alone is worth over £100 million to Scotland's economy each year. In Aberdeen City and Aberdeenshire, the extensive coastline offers assets such as Aberdeen

Beach and Balmedie Beach, which are crucial for supporting local sailing and small vessel marine recreation (The James Hutton Institute, n.d.).

1.6.21 In Aberdeen and Aberdeenshire, tourism accommodation establishments are majorly non-serviced, predominantly self-catered accommodation (Visit Aberdeenshire, 2024). Between 2023-24, there was a decline in non-serviced accommodation occupancy alongside a small rise in hotel room occupancy.

Receptors

1.6.22 Typical tourism and recreation receptors identified across the onshore and offshore assessments include:

- Dunnottar Castle and Woods, and other cultural heritage assets;
- Lighthouses;
- Beaches and harbours;
- Museums and nature reserves; and
- Recreational Areas, Coastal paths, forestry paths, and National Cycle Network routes.

1.6.23 A complete list of tourism and recreation receptors is provided in Annex A1 and shown on Figure A.2 and Figure A.3 in Annex A4.

Socio-cultural Values

1.6.24 Aberdeenshire is centred around core values of environmental awareness, community empowerment, and supporting local businesses (Aberdeenshire Council, n.d.). In Kincardine and Mearns, key priorities include health and nature-based activities and active travel options, such as walking and cycling. Hence, the development and preservation of open spaces, foot and cycle paths are core to the community (Aberdeenshire Community Planning Partnership, 2025).

1.6.25 The decline of the oil and gas industry has increased economic challenges for the North East's coastal communities, including increasing inequality and deskilling of labour, leading to higher levels of out-migration compared to other parts of Scotland (Just Transition Commission, 2025; Scottish Government, 2020). Changes to the climate also poses a threat the region, with increasing erosion of coastal infrastructure, which are core to the region's economy, way of life and social identity (Aberdeenshire Council, 2025; Community Planning Aberdeen, 2023). Likewise, in Angus, where almost two-thirds of residents live in coastal areas, escalating flooding and erosion are generating significant financial, emotional, and physical pressures on local communities (Angus Council, 2016).

1.6.26 An analysis of data from the Understanding Society Survey summarises research showing that local area deprivation and social fragmentation strongly influence individual wellbeing, independent of personal circumstances. Residents in the most deprived neighbourhoods experience lower wellbeing, weaker social cohesion, and reduced neighbourhood attachment (What Works Wellbeing, 2019).

1.6.27 According to 2020 Scottish Index of Multiple Deprivation (SIMD) data, which measure deprivation in terms of domains such as income, health, and access to services, Aberdeenshire has relatively low levels of deprivation. Some pockets of deprivation exist in Peterhead and Fraserburgh; however, the area local to the onshore infrastructure, Mearns and Stonehaven and Lower Deeside, has relatively low levels of deprivation (Aberdeenshire Council, 2020). Both Aberdeen City and Angus have mixed deprivation profiles and are suffering from increasing inequality.

1.6.28 Figure A.5 in Annex A4 illustrates the SIMD 2020 data for least to most deprived areas across the Regional Socio-Economics Study Area.

Public and Private Receptors

1.6.29 Public and Private receptors were considered in the onshore assessment only. Receptors were identified within a 500m buffer of the onshore infrastructure. These included:

- Community receptors such as local schools, public halls, parks, sports facilities and churches.
- Commercial receptors such as convenience stores and self-catering holiday properties.

1.6.30 A complete list of community and commercial receptors is provided in Annex 1 and shown on Figure A.4 of Annex A4.

1.7 Key Parameters for Assessment

Maximum Design Scenario

1.7.1 The Maximum Design Scenario (MDS) identified in Table 1.11 are those parameters expected to have the potential to result in the greatest effect on an identified receptor or receptor group. Any other development scenario in the Project Design Envelope (PDE), will result in an equal to, or lower, level of environmental effect. The scenario has been selected from the details provided in Volume 1, Chapter 3: Project Description.

Table 1.11 Maximum Design Scenario Considered for Each Potential Impact as Part of the Assessment of Likely significant Environmental Effects on Socio-Economics, Tourism and Recreation

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
Impact on employment, GVA and supply chain	✓	✓	✓	**All phases** The socio-economic assessment of impacts on GVA and employment is modelled based on the expected level of Project expenditure. Detailed expenditure based on the Proposed Development infrastructure and design is not available at this stage. However, the SCDS contains expenditure estimates for construction and O&M. Total expenditure was estimated based on a typical OWF of this size, with two scenarios for the proportion of total expenditure in the Scottish and UK supply chain - the Commitments scenario and the Ambitions scenario. For the Construction and O&M phases, the MDS of the employment and GVA impacts are derived directly from the SCDS Commitments scenario construction and O&M stage expenditure in the Scottish and UK supply chain. For the decommissioning phase, the MDS of the employment and GVA impacts are derived from an assumption for total decommissioning expenditure based on the Guide to an Offshore Wind Farm (BVG Associates, 2025), with the assumed proportion of Scottish and UK supply chain expenditure based on that of the SCDS Commitments scenario construction stage expenditure, since the scale and type of effects during the decommissioning stage could be expected to be similar to those anticipated to occur during the construction stage.	Scenario 1 (Commitments scenario) assumes a lower proportion of total expenditure in the Scottish and UK supply chain than the Ambitions scenario, therefore the Commitments scenario represents the worst-case scenario for GVA and employment benefits.
Demographic Changes	✓	✓	✓	**All phases** The MDS for demographic changes across all phases of the Project are defined using a similar approach. The employment supported during the construction, O&M, and decommissioning of the Proposed Development may attract permanent or transient workers to the Regional Socio-Economics Study Area. Therefore, the MDS for demographic changes represents the maximum number of workers which will need to be employed within Scotland, assuming that none can be sourced locally. This provides a worst-case scenario for	The employment supported during the construction, O&M, and decommissioning of the Proposed Development may attract permanent or transient workers to port locations. As port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
				a long-term increase in the local population, as people move to the area for job opportunities and to fill skilled and technical roles. Most of these impacts are expected to occur at the port locations for the Project, which are unknown at the time of writing, but are expected to be located within the Regional Socio-Economics Study Area. For the onshore elements, construction workforce numbers were estimated by the Applicant. The proportion of the workforce that would be made up of transient workers was estimated by using the draft employment targets that would be implemented by the contractor (i.e. using the lowest percentage of the workforce that is required to be sourced locally). O&M Phase was scoped out for the onshore assessment. For the offshore elements, the demographic assessment has been based on the estimated employment impacts under the SCDS Commitment scenario as this scenario is expected to generate the greatest increase in employment in the Regional Socio-Economics Study Area. The MDS also considers that due to the potential for further employment opportunities in the industry, the offshore workforce would relocate with their families, resulting in greater increase in population.	were used in the assessment. A 'rural' port location is considered to represent the MDS as it is likely to be of higher sensitivity. The MDS for demographics also considers the potential change in demographics in relation to the employment generated under the Commitment scenario and assumes that the workforce would not be able to be sourced locally.
Changes to demand for housing and local services	✓	✓	✓	**All phases** The MDS for changes to demand for housing and other local services across all phases of the Project are defined using a similar approach. Any demographic changes occurring because of the Project may cause changes to housing market demand. Thus, the impact on changes to housing demand draws on the MDS assumptions for demographic changes across the three phases.	Any demographic changes because of increased employment during the construction, O&M and decommissioning of the Project may cause changes to demand for housing local services.

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
				For the offshore elements, as port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario were used in the assessment. O&M Phase was scoped out for the onshore assessment.	As port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario were used in the offshore assessment. A 'rural' port location is considered to represent the MDS as it is likely to be of higher sensitivity.
Changes to tourism and recreation receptors	✓	✓	✓	Tourism and recreation impacts are determined by significant environmental effects identified in the following chapters: **Offshore assessment:** - Volume 2, Chapter 13: Commercial Fisheries; and - Volume 12, Chapter 14: Shipping and Navigation; - Volume 2, Chapter 16: Infrastructure and Other Users - Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts; and - Volume 2, Chapter 21: Cultural Heritage. **Onshore assessment:** - Volume 1, Chapter 6: Land Use, Agriculture and Public Access; and - Volume 1, Chapter 8: Landscape and Visual; - Volume 1, Chapter 13: Noise and Vibration; and - Volume 1, Chapter 14: Traffic and Transport. The MDS for these chapters have been applied to the assessment. Refer to the EIA chapters above for additional details on topic specific MDS.	The construction, O&M and decommissioning of the Project has the potential to influence enjoyment of tourism and recreation assets and affect visitor behaviour, depending on the other environmental impacts that are generated. As impacts on tourism and recreation are indirect and arise from the secondary effects from other EIA chapters, the MDS for these relevant environmental topics have been applied to the assessment.
Changes to amenity of local public & private services	✓	×	×	**Onshore assessment:** Informed by MDS in the following environmental topics: - Volume 1, Chapter 6: Land Use, Agriculture and Public Access; and - Volume 1, Chapter 8: Landscape and Visual;	As impacts on amenity are indirect and arise from the secondary effects from other EIA chapters, the MDS for these relevant environmental topics

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
				- Volume 1, Chapter 13: Noise and Vibration; and - Volume 1, Chapter 14: Traffic and Transport. Refer to the EIA chapters above for additional details on topic specific MDS.	have been applied to the assessment.
Socio-cultural Impacts	✓	✓	✓	The Project may lead to socio-cultural effects on communities arising from increased activity at port(s) and around Landfall, and from the construction and operation of onshore infrastructure. Under a worst-case scenario, the workforce required for the Project could result in pronounced short-term demographic change, heightened demand for housing and local services, and shifts in community character and wellbeing. Given the scale and duration of activity at both construction and O&M ports, socio-cultural effects could extend across coastal communities, with potential implications for quality of life, sense of place, and overall community resilience. Decommissioning phase for socio-cultural impacts was scoped out for the onshore assessment.	Port locations are not yet confirmed but the Applicant has committed to an O&M port in Aberdeenshire, Aberdeen City or Angus. Therefore, a modelled scenario for both an 'urban' and 'rural' port location has been assessed, with the 'rural' location considered to represent the MDS as it would be more sensitive to change.

Impacts Scoped Out of the Assessment

1.7.2 On the basis of the baseline environment and the Project Description outlined in Volume 1, Chapter 3: Project Description of the onshore and offshore EIA reports, a number of impacts are scoped out of the assessment for socio-economics, tourism and recreation. This was as per the Bowdun Onshore OWF Scoping Report (BOWFL, 2024) and Bowdun Offshore OWF Scoping Report (BOWFL 2024) and was confirmed with stakeholders through scoping and receipt of Scoping Opinions.

Table 1.12 Impacts Scoped Out of the Assessment for Socio-economics (✓ Confirms the Impact is Scoped out)

Impact	Project Element	Phase*		
		C	O	D
Demographic Changes	Onshore	×	✓	×
Changes to demand for housing and local services	Onshore	×	✓	×
Socio-cultural impacts	Onshore	×	×	✓
Transboundary socio-economic effects	Offshore	✓	✓	✓

*Phase refers to construction (C), O&M (O) and decommissioning (D).

1.7.3 Socio-cultural impacts were initially scoped out of the offshore assessment for decommissioning due to uncertainties around the future baseline for communities but were scoped back in following receipt of MD-LOT/MAU Scoping Opinion. The assessment of socio-cultural impacts for decommissioning has been undertaken using assumptions from evidence gathered regarding the future baseline.

1.8 Methodology for Assessment of Effects

Overview

1.8.1 The Socio-Economic, Recreation and Tourism assessment of effects has followed the methodology set out in Volume 1, Chapter 3: EIA Methodology. Specific to the assessment, the following guidance documents have also been considered:

- HM Treasury (2022) Green Book;
- Defining 'local areas' for assessing the economic impact of offshore renewables and other marine developments: guidance principles (Marine Scotland, 2022);
- General Advice for Offshore Socio-Economic Impact Assessment (SEIA), Marine Analytical Unit (MAU) (Marine Analytical Unit, 2023);
- Guidance on assessing the socio-economic impacts of offshore wind farms (OWFs) (Glasson *et al.*, 2020); and
- Guide to an Offshore Wind Farm Update 2025 (BVG Associates, 2025).

1.8.2 Socio-economic, tourism and recreation assessments recently undertaken for other offshore wind developments in Scotland have also been considered where relevant, for alignment with industry best practice.

1.8.3 The following sections describe the criteria used for evaluating the Socio-Economic, Recreation and Tourism effects. Some variations from the criteria are outlined within the 'Approach' sub-section for each impact described in Section 1.10.

Criteria for Assessment

1.8.4 This section describes the criteria used for assigning values for the magnitude of the potential impacts and the sensitivity of the receptors, which is used to determine the overall significance of effects. The terms used to define magnitude and sensitivity are described in further detail in Volume 2, Chapter 4: EIA Methodology in this Offshore EIA Report and Volume 1, Chapter 3: EIA Methodology of the Onshore EIA Report (BOWFL, 2025).

1.8.5 The magnitude section of each impact assessment describes the spatial extent, duration, frequency and reversibility of impact (e.g. a duration of hours or days would be considered for most receptors to be of short-term duration, which is likely to result in a low magnitude of impact).

Identification of receptors

1.8.6 A 'receptor' refers to the population group or entity experiencing the impact. The various receptors considered in the assessment for each sub-topic are shown in Table 1.13.

Table 1.13: Socio-economic Receptors by Sub-topic

Subtopic	Receptor
GVA, employment, and supply chain	Regional, national, UK-wide economy
	Regional, national, UK-wide labour market
Changes to demographics	Regional and local communities
Changes in demand for housing and local services	Accommodation stock and local services
Changes to tourism and recreation receptors	Tourism and recreation receptors
	Regional tourism economy
Socio-cultural impacts	Regional and local communities

Magnitude of change

1.8.7 The magnitude of change represents the scale of the change from the baseline condition. It is described as negligible, low, medium or high in accordance with the generic criteria set out in Volume 1, Chapter 3: EIA Methodology.

1.8.8 There is no guidance or set criteria for assessing the magnitude of change for offshore wind developments for the socio-economic, tourism and recreation sub-topics.

1.8.9 For the quantitative assessment of impacts on GVA and employment and changes in demographics, the assumed criteria for determining the magnitude of change is shown in Table 1.14 and Table 1.15 respectively.

Table 1.14: Magnitude of Change Criteria – GVA and Employment

Magnitude of impact	Low bound	Upper bound
High	1.0%	-
Medium	0.5%	1.0%
Low	0.1%	0.5%
Negligible	-	0.1%

Table 1.15: Magnitude of Change Criteria – Changes in Demographics

Magnitude of Impact	Definition
High	The impact on demographic changes would be considered to have a high magnitude if the change in residual population was equivalent to 100% or more of the average annual growth rate for the study area.
Medium	The impact on demographic changes would be considered to have a medium magnitude if the change in residual population was equivalent to between 50% and 100% of the average annual growth rate for the study area.
Low	The impact on demographic changes would be considered to have a low magnitude if the change in residual population was equivalent to between 25% and 50% of the average annual growth rate for the study area.
Negligible	The impact on demographic changes would be considered to have a negligible magnitude if the change in residual population was equivalent to less than 25% of the average annual growth rate for the study area.
No Change	No population changes are expected to occur.

1.8.10 For the other socio-economic, tourism and recreation sub-topics, the impacts are complex and qualitative in nature, and it is not possible to apply specific quantitative criteria to determine the magnitude. The magnitude rating was assigned based on qualitative assessment and professional judgement. As such, the assessment presented in this chapter differs slightly from other EIA topic assessments for which more established guidance is available.

Sensitivity of receptor

1.8.11 Table 1.13 outlines the criteria for defining the sensitivity of receptors, in relation to factors such as performance; capacity to withstand change; and level of policy priority. Sensitivity criteria from Glasson *et al.* (2020), utilised in multiple OWF socio-economic, tourism and recreation assessments, has been adapted for the purposes of this assessment.

1.8.12 For changes to amenity, sensitivity is assigned to individual receptors where significant residual impacts are identified from the relevant EIA chapters. This

considers whether receptors are used by vulnerable members of the community, or whether the nature of the business is particular sensitive to environmental changes.

Table 1.16: Definition of Terms Relating to the Sensitivity of the Receptor

Value/Sensitivity	Definition
High	The receptor or effect category is identified as a priority in local and relevant policies. There is evidence that this receptor or subtopic faces major socio-economic challenges or underperforms, or there is vulnerability in the study area.
Medium	The receptor or effect category is not identified as a priority in local and relevant policies. There is evidence of considerable socio-economic challenge or underperformance and vulnerability for this receptor or subtopic.
Low	The receptor or effect category is not identified as a priority in local and relevant policies. There is evidence that this receptor or subtopic is resilient, and there are no identified weaknesses or challenges in the study area.
Negligible	The receptor or effect category is not identified as a priority in local and relevant policies. There is evidence that this receptor or subtopic currently performs well, with no weaknesses or challenges in the study area.

Significance

1.8.13 The significance of change is determined based on the magnitude of the impact and the sensitivity of the receptor, as presented in Table 1.17 and Table 2.18.

1.8.14 The EIA Regulations require the identification and reporting of significant environmental effects. For the purposes of this assessment:

- a level of moderate or more will be considered a 'significant' effect in terms of the EIA Regulations; and
- a level of minor or less will be considered 'not significant' in terms of the EIA Regulations.

1.8.15 Table 1.17 illustrates the relationship between the sensitivity of receptor and magnitude of change in determining significance of effect. Effects are ranked as negligible, minor, moderate or major. minor and negligible effects are considered not significant in EIA terms. Table 1.18 provides the definition for each significance level.

1.8.16 Where a range is suggested for the significance of effect, for example, 'minor' to 'moderate', professional judgement will be applied to determine which significance level is most likely and the rationale for this decision will be explained in the assessment. These factors may include the likelihood that an effect will occur, data certainty and relevant information about the wider environmental context.

Table 1.17: Matrix Used for the Assessment of the Significance of the Effect

Sensitivity of Receptor	Magnitude of Impact			
	Negligible	**Low**	**Medium**	**High**
Negligible	Negligible	Negligible or Minor	Negligible or Minor	Minor
Low	Negligible or Minor	Negligible or Minor	Minor	Minor or Moderate
Medium	Negligible or Minor	Minor	Moderate	Moderate or Major
High	Minor	Minor or Moderate	Moderate or Major	Major
Very High	Minor	Moderate or Major	Major	Major

Table 1.18: Definition of Significance

Impact	Justification
Negligible	No effects or those that are beneath levels of perception, within normal bounds of variation, or within the margin of forecasting error.
Minor	These beneficial or adverse effects are generally, but not exclusively, raised as local factors. They are unlikely to be critical in the decision-making process but are important in enhancing the subsequent design of the Proposed Development.
Moderate	These beneficial or adverse effects have the potential to be important and may influence the decision-making process. The cumulative effects of such factors may influence decision-making if they lead to an increase in the overall adverse or beneficial effect on a particular resource or receptor.
Major	These beneficial or adverse effects are very important and are likely to be material in the decision-making process. These effects are generally, but not exclusively, associated with sites or features of international, national, or regional importance. However, a major change in a site or feature of local importance may also enter this category.

1.9 Limitations and Assumptions

1.9.1 A number of data limitations and assumptions apply to the Socio-Economics, Tourism and Recreation assessment for both the onshore and offshore elements of the Project.

1.9.2 Availability of recent data was a limitation in collecting baseline information for some socio-economic topics. Up-to-date data varies across local authorities, particularly for local service capacity and socio-cultural values. Aberdeenshire and Aberdeen City have more up-to-date datasets, while Angus Council data can be up to ten years old. As datasets are produced by different organisations on varying cycles, such gaps are typical for this type of baseline analysis.

1.9.3 The assessment draws on several technical chapters across both the onshore and offshore EIAs. Therefore, any assumptions or limitations within those chapters also apply here, including:

- Land Use, Landscape and Visual, Air Quality, Noise and Vibration, Traffic and Transport (Onshore EIA).
- Commercial Fisheries, Shipping and Navigation, Infrastructure and Other Users, Seascape and Visual, Cultural Heritage (Offshore EIA).

1.9.4 No dedicated site-specific socio-economic surveys were undertaken, as they were not considered necessary at this stage. However, key receptors were verified during site visits undertaken for other environmental topics, supported by desk-based information.

1.9.5 For the modelling of GVA and employment, two scenarios were modelled reflecting higher and lower levels of local and UK supply chain participation. Assumptions were made about the types of activities and industries linked to each expenditure category, and the proportion of spend associated with each, in order to apply appropriate sector-specific multipliers for estimating GVA and employment impacts. Further details of GVA and employment modelling assumptions are provided in Volume 2, Technical Appendix 18.2: Socio-Economics Quantitative Assessment Methodology of this Offshore EIA Report.

1.9.6 As the port locations have not yet been confirmed, assessments related to demographics, housing, local services, and socio-cultural impacts are necessarily high-level at this stage. The Applicant has committed to a port in Aberdeenshire, Aberdeen City or Angus during the O&M phase; therefore, additional detail has been provided for this Project phase. The Applicant will review the assessment following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.

1.9.7 The assessment relies on local authority-level information rather than Project-specific primary research. A report, National Assessment of Socioeconomic Issues and Opportunities for Offshore Wind Scoping Report (BiGGAR Economics, 2025), commissioned on behalf of the Scottish Offshore Wind Energy Council (SOWEC) for the Crown Estate Scotland recommends sector-wide assessment and engagement for understanding cumulative social impacts associated with ports. The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

1.10 Embedded Measures and Mitigation

1.10.1 As part of the Project design process, a range of Embedded Mitigation and monitoring measures have been incorporated to avoid or reduce potential impacts on socio-economics, tourism and recreation. These measures are integral to the Project and have therefore been accounted for in the assessment.

1.10.2 A range of onshore measures will be implemented to manage impacts and protect local communities. A Construction Traffic Management Plan (CTMP) will control construction traffic through agreed HGV routing, worker transport arrangements, safe use of the local road network and any required improvements, developed in consultation with Aberdeenshire Council and Transport Scotland. In addition, a Construction Environmental Management Plan (CEMP) will address potential effects such as noise, dust, landscape change and community disruption, and will include both a worker Code of Conduct and a Community Engagement Strategy to ensure clear communication, consultation and management of any concerns raised by local stakeholders.

1.10.3 The Project will also implement mitigation measures to manage and minimise environmental and community impacts arising from offshore activities. A Construction Method Statement and Code of Construction Practice will set clear standards to limit construction-related effects around port and Landfall areas. During operation, an Operations and Maintenance Programme will coordinate vessel movements to limit disturbance to O&M port towns by providing advance notice of activities. In parallel, a Fisheries Mitigation, Monitoring and Communication Plan will reduce impacts on the commercial fishing sector through clear communication, monitoring of interactions and proactive management of activities to minimise disruption to day-to-day fishing operations.

1.10.4 The Applicant has committed to developing a Project-wide Accommodation Strategy, which will be developed to identify suitable housing options for the construction and decommissioning workforce, ensuring demand is met without displacing local residents or tourism accommodation. As outlined in Table 1.20, the Applicant will review the assessment following a decision on the construction and O&M ports.

1.10.5 A summary of the relevant embedded measures is provided in Table 1.19 and Table 1.20.

Table 1.19: Embedded Mitigation Measures

ID*	Embedded Measures Adopted as Part of the Project
Onshore Assessment	
GEN1	Avoidance of private property and housing
	Avoidance of Community Land and Community Assets
	Avoidance of rights of way, including Core Paths and long-distance footpaths
GEN2	Production of a Construction Environmental Management Plan (CEMP) (including a Community Engagement Strategy)
GEN3	Production of a Construction Traffic Management Plan (CTMP)
SOCIO1	Production of Accommodation Strategy
Offshore Assessment	
7	Development of, and adherence to, a Construction Method Statement (CMS) along with a Code of Construction Practice (CoCP).

ID*	Embedded Measures Adopted as Part of the Project
8	All relevant Health and Safety Executive procedures will be followed.
9	Development of, and adherence to, a combined Navigational Safety and Vessel Management Plan (NSVMP), describing Project vessels' requirements, passages, monitoring and controls.
10	Development of, and adherence to, a Fisheries Mitigation, Monitoring and Communication Plan (FMMCP).
11	Appointment of a Company Fisheries Liaison Officer (CFLO).
12	Advance warning and accurate location details of planned operations, associated Safety Zones and advisory passing distances will be given via Notices to Mariners and Kingfisher Bulletins.
13	Development of, and adherence to, a Lighting and Marking Plan.
14	Adherence to best practice guidance with regards to fisheries liaison and procedures in the event of interactions between the offshore component of the Project and fishing activities (e.g. Fisheries Liaison with Offshore Wind and Wet Renewables (FLOWW) group, ; 2025).
15	Participation in relevant commercial fisheries working group.
23	Development of, and adherence to, an Operation and Maintenance Programme (OMP) in conjunction with approved post-consent construction plans.
26	The Applicant will work with other developers, Government, and key stakeholders to assist in addressing barriers to local supply chain participation.
27	The Applicant will engage with local supply chain as part of a developing strategy to leverage oil and gas competencies and maximise local content as much as practicable for the Project.
28	The Energy Pathfinder will be followed to ensure visibility of the work programme and an opportunity for Scottish and UK suppliers to bid for work.
34	Drafting and implementation of a decommissioning programme, prepared in accordance with requirements of the Energy Act 2004, which will set out the extent of infrastructure to be removed as well as the methods and processes which will be used.
48	Where boulder removal is required during site preparation, the location of large boulders that are relocated and may pose a snagging risk for fishing gear, will be disclosed to the fishing industry within a timely manner and in an accessible format.
56	Drafting of an Accommodation Strategy, once port location(s) is known, to support construction activity.

*see Onshore EIA – Volume 2, Appendix 2.1: Schedule of Mitigation and Offshore EIA - Volume 3, Technical Appendix 4.6: Schedule of Mitigation and Commitments

Table 1.20: Embedded Monitoring Measures

ID*	Embedded Measures Adopted as Part of the Project
Offshore Assessment	
3	Engage and contribute to relevant regional and strategic monitoring, where appropriate to do so for the Proposed Development, giving due consideration to the Scottish Marine Energy Research (ScotMER) programme (or any successor programme formed to facilitate these research interests), or any developer lead regional groups.
6	Monitor expenditure throughout the supply chain to evaluate its impacts and determine whether the commitments outlined in the SCDS are being met. This

ID*	Embedded Measures Adopted as Part of the Project
	will also help identify necessary actions to ensure the maximisation of spending commitments as per the SCDS.
7	Review of potential socio-economic impacts following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.

* Offshore EIA - Volume 3, Technical Appendix 4.6: Schedule of Mitigation and Commitments

1.11 Approach and Significance of Effect

IMPACT 1 – IMPACT ON GVA, EMPLOYMENT AND SUPPLY CHAIN

Approach

1.11.1 Impacts on GVA (in real, undiscounted terms) and employment (Full-Time Equivalent (FTE) jobs for long-term employment, and aggregate FTE years (aFTE)) were modelled for the construction, operational, and decommissioning phases. The key input was expenditure assumptions derived using the supply chain expenditure targets that will inform the updated Bowdun Offshore Windfarm Supply Chain Development Statement (SCDS), a refresh of the 2023 Bowdun OWF SCDS, due to be published in 2026.

1.11.2 Sectoral multipliers were applied to the projected expenditure to estimate direct, indirect and induced impacts on GVA and Employment. Multipliers were sourced from Scottish and UK Government publications and national Input–Output tables and are applied according to the assumed industry sector associated with each category of project spending.

1.11.3 The assessment of GVA and employment effects considers the Project as a single integrated development comprising both onshore and offshore elements. This combined approach is appropriate as expenditure data is currently available only at whole-project level, and because economic impacts are determined by the geographic distribution of supply chain spending rather than the physical location of the activity. Additionally, many activities, particularly during the operations phase, support the development as a whole and cannot be meaningfully disaggregated, and investment in either the onshore or offshore works would not proceed independently.

1.11.4 Two scenarios were assessed based on the scenarios in the 2026 SCDS for the proportion of expenditure in the Scottish and UK supply chain:

- Scenario 1 ('Commitments' scenario) reflecting minimum reasonable Scottish and UK supply-chain capability; and
- Scenario 2 ('Ambitions' scenario) representing higher Scottish and UK supply chain content aligned with national objectives for 60% UK content in offshore wind by 2030.

1.11.5 The SCDS includes expenditure estimates for the Construction and Operational phases only. Decommissioning expenditure was estimated using industry guidance from Guide to an Offshore Wind Farm Update 2025 (BVG Associates,

2025) and apportioned according to the regional expenditure shares assumed in the SCDS for CAPEX.

1.11.6 The SCDS expenditure figures includes 6 years of OPEX. This was adjusted up to include 30 years of OPEX for the full 30-year lifespan of the Project, to align with the 30-year Project lifespan assumed in Guide to an Offshore Wind Farm Update 2025 (BVG Associates, 2025).

1.11.7 GVA and employment effects are assessed for the UK and Scotland across all three phases (CAPEX, OPEX and DECEX). For the OPEX phase only, the effects are also assessed for the Regional Socio-Economics Study Area (comprising Aberdeenshire, Aberdeen City or Angus), because the Applicant has committed to locating an O&M port within this regional area. For this it was assumed that 35% (Scenario 1 - Commitments scenario) to 50% (Scenario 2 – Ambitions scenario) of Scotland-based expenditure is allocated to suppliers within the Regional Socio-Economics Study Area.

1.11.8 The expenditure assumptions for each scenario are summarised in Table 1.21 and Table 1.22. These figures are cumulative across geographies.

Table 1.21: Scenario 1 (Commitments Scenario) Expenditure

Categories of spend		Regional Socio-Economics Study Area (£mln)	Scotland (£mln)	UK (£mln)	Total (Including Rest of World (£mln))
CAPEX	Development	-	£57	£89	£114
	Manufacturing/ Fabrication	-	£182	£584	£2,995
	Installation	-	£272	£458	£1,030
OPEX	Operation + Maintenance	£637	£1,820	£1,820	£2,245
DECEX	Decommissioning	-	£53	£116	£426

Table 1.22: Scenario 2 (Ambitions Scenario) Expenditure

Categories of spend		Regional Socio-Economics Study Area (£mln)	Scotland (£mln)	UK (£mln)	Total (Including Rest of World (£mln))
CAPEX	Development	-	£57	£89	£114
	Manufacturing/ Fabrication	-	£1,046	£1,815	£2,995
	Installation	-	£278	£464	£1,030
OPEX	Operation + Maintenance	£910	£1,820	£1,820	£2,245
DECEX	Decommissioning	-	£141	£242	£426

Potential Impacts

1.11.9 The Project is expected to deliver substantial economic benefits across Scotland and the wider UK by driving sectoral growth, supporting productivity improvements, and strengthening long-term economic resilience. The Applicant places strong emphasis on workforce and skills development within the offshore wind sector, and the SCDS includes commitments to maximise local supplier involvement through early engagement, capability assessment, and participation in the Applicant's award-winning Supply Chain Pathways Programme. Delivered in partnership with Tier-1 contractor DEME Offshore, the programme pre-qualifies Scottish suppliers, enabling improved access to opportunities within Bowdun Offshore Windfarm and future UK and international offshore wind projects.

1.11.10 The offshore wind sector sits within the rapidly expanding UK net-zero economy, which has grown three times faster than the wider economy over the past year and now contributes £7.7 billion annually to UK GVA (CBI Economics, 2025). Jobs in this sector are typically high-value, with average earnings of around £43,100, about 15% above the national average, while wind turbine technicians earn between £25,000 and £47,000 depending on experience (National Careers Service, 2025). In Scotland, productivity in net-zero sectors is strong, with GVA per worker reaching £104,037 (CBI Economics, 2025). The Project therefore presents a strategic opportunity to support the transition of Scotland's oil and gas supply chain into renewable energy, aided by early engagement with Scottish Enterprise Agencies and industry clusters to reduce investment risk, strengthen capability, and leverage Scotland's established engineering expertise.

1.11.11 Baseline GVA and employment conditions for the Regional Socio-Economics Study Area, Scotland, and the UK are outlined in Table A.5 (Annex A3), aligned with ONS sector categories such as manufacturing, construction, utilities, transport, and professional services. The estimated direct, indirect, and induced impacts for GVA and employment under each scenario are presented in Annex A3, with GVA shown in real, undiscounted terms. Most benefits arise during the four-year construction phase. During operation and maintenance, jobs are expected across technical, managerial, HSE, and procurement/logistics roles, with many technical positions anticipated to be filled locally due to the strong regional engineering base. The Applicant estimates that the expected salaries for jobs directly created by the Project will range from £40,000 to £120,000, with many roles having a higher salary than the Aberdeenshire average of £47,170 (Aberdeenshire Council, 2025).

Significance of the Effect

1.11.12 In cases where the significance matrix indicates a range (e.g. moderate to minor), for an employment impact in Scotland or the Regional Socio-Economics Study Area, the higher rating has been assigned because it is expected that many of the jobs created, particular those in the Regional Socio-Economics Study Area and Scotland, will be high-value jobs. In any other cases where the significance matrix indicates a range (GVA impacts, or UK employment impacts),

the higher or lower rating has been assigned based on whether the estimated impact percentage is higher or lower in the band for determining the magnitude rating. For example, an impact of 0.4% is higher in the band of 0.1% - 0.5% for a low magnitude of impact, so in this case if the significance matrix indicated a range such as negligible to minor, a minor significance rating would be assigned.

1.11.13 Table 1.23, Table 1.24, and Table 1.25 present the significance of the effect on GVA and employment for the three Project phases.

Table 1.23 Significance - Construction

Construction	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
Scotland					
Scenario 1 (Commitments Scenario)	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	FTEs	Low	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Medium	Medium	Moderate (Beneficial)	**Significant** (Beneficial)
	FTEs	Low	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

Table 1.24 Significance - Operation and Maintenance

Operation	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
Regional Socio-Economics Study Area					
Scenario 1 (Commitments Scenario)	GVA	High	High	Major (Beneficial)	**Significant** (Beneficial)
	FTEs	Low	High	Moderate (Beneficial)	**Significant** (Beneficial)
Scenario 2 (Ambitions Scenario)	GVA	High	High	Major (Beneficial)	**Significant** (Beneficial)
	FTEs	Low	High	Moderate (Beneficial)	**Significant** (Beneficial)
Scotland					
	GVA	Medium	Medium	Moderate (Beneficial)	**Significant** (Beneficial)

Scenario 1 (Commitments Scenario)	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Medium	Medium	Moderate (Beneficial)	**Significant** (Beneficial)
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

Table 1.25 Significance - Decommissioning

Decommissioning	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
Scotland					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Medium	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Medium	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

1.11.14 Across the full project lifecycle (construction, O&M and decommissioning) it is expected that under the updated Scenario 1 ('Commitments' scenario), the Project would support:

- Employment of 23,478 aFTEs (2,087 FTEs), and £1,934 million GVA in Scotland; and
- Employment of 34,224 aFTEs (5,083 FTEs) and £2.5 billion GVA across the UK.

1.11.15 The Applicant has committed to locating an O&M port within Aberdeenshire, Aberdeen City or Angus (the Regional Socio-Economics Study Area), but the location of construction and marshalling ports have not yet been selected, therefore GVA and employment effects were assessed for the Regional Socio-Economics Study Area for the O&M phase only. It is expected that during this phase, the Project would support 6,279 aFTEs (209 FTEs), a **Major** beneficial (significant) effect; and generate £522 million GVA in the Regional Socio-Economics Study Area, a **Moderate** beneficial (significant) effect.

1.11.16 The detailed GVA and employment assessment outputs, including GVA value and employment numbers by phase, are provided in Annex A3.

IMPACT 2 – CHANGES TO DEMOGRAPHICS

Approach

1.11.17 The demographic assessment considers how employment generated during the construction, O&M, and decommissioning phases of the Project may influence population change within the communities likely to host the workforce, within the Travel to Work Area (TTWA). The assessment examines the extent to which project-related employment could result in an increase in the local population, taking into account the number of direct and indirect jobs created, the expected proportion of these roles filled by non-resident workers, and the duration of employment contracts. Together, these factors determine the scale and duration of any population change associated with the Project.

1.11.18 Community sensitivity to demographic change is assessed by analysing existing migration trends within potential host communities and projected population changes over time. This includes consideration of age structure, baseline labour-market characteristics, and the relationship between the likely project workforce and community demographic profiles. Impact magnitude is then evaluated by comparing the estimated project-related population to the existing population within the study area, and by assessing this change in the context of the area's average annual population growth rate.

1.11.19 Port locations for offshore activities for construction and decommissioning have not yet been selected, which precludes an assessment of demographic change on specific host communities for these phases. For O&M, the Applicant has committed to a port in Aberdeen City, Aberdeenshire or Angus (the Regional Socio-Economics Study Area), however the specific location is not yet known, so two scenarios were assessed, a rural port location and an urban port location, to reflect how demographic effects may differ depending on the characteristics of the host community. The magnitude of change was assessed

by comparing the estimated population increase resulting from employment associated with the Proposed Development to the existing population and the average annual net population growth, within the relevant Travel to Work Area (TTWA)[6] of each of the proxy Urban and Rural locations.

1.11.20 Demographic changes can have positive and negative economic and socio-cultural implications. This sub-topic considers changing demographics through an economic lens, in relation to labour market dynamics and economic growth and development. For example, an aging population can result in a shrinking workforce, leading to potential labour shortages and putting pressure on social security systems. Demographic shifts towards a larger working age population and smaller proportion of dependents can potentially boost economic activity through a reduction in reliance on social security and increased expenditure in the economy. However, a rapid expansion of population can place strain on infrastructure and resources which planning and investment may not be able to keep up with, having an adverse impact on economic development.

Potential Impacts

Construction

1.11.21 During the construction phase, the employment opportunities associated with the project may cause a growth in the size of the working-age population in the local area. This could boost labour supply and economic activity, but rapid growth may also strain infrastructure, housing, and public services if not supported by adequate planning and investment.

1.11.22 For construction of the Onshore Infrastructure, a minimum of 73 (32.9%) of roles required are expected to be sourced from Aberdeenshire and Angus. It is therefore assumed that the remaining 149 roles could be filled by workers from the remainder of Scotland and the UK. It is anticipated that the majority of the temporary workforce required for construction would reside within the larger settlements in the Aberdeen TTWA, which encompasses Stonehaven and Aberdeen City. These settlements alone have a combined population of approximately 238,900 and would have the capacity to absorb a relatively small increase in population (0.06%).

1.11.23 The economic model suggests that under the 'Commitment' scenario, the Project could create an estimated 1,093 FTEs in Scotland during the construction phase. Initial analysis of the construction activities and workforce requirements undertaken by the Applicant indicates that the number of workers required onsite at ports would increase across the five-year construction period. The workforce would more than double between Y1 and Y2, then would continue to increase more gradually from Y2 to Y4, with peak construction workforce anticipated in Y4 and gradually winding down during Y5. This suggests that the extent of demographic change will vary throughout the construction period.

[6] A Travel to Work Area (TTWA) is a UK statistical region representing an area where of the resident economically active population, at least 75% work in the area, and also, that of everyone working in the area, at least 75% live in the area.

1.11.24 The construction periods for the Onshore and Offshore Infrastructure are anticipated to overlap for up to four years. Should the chosen construction port(s) be located within Aberdeenshire or Aberdeen City, there could be a greater impact on demographics than that reported for the Onshore Infrastructure alone due to the cumulative workforce demands and associated temporary population movements generated by both components of the Project.

Operation and Maintenance

1.11.25 During O&M, employment generated by the Project may encourage existing residents to remain or attract new workers to communities around the ports used for this phase. The scale of demographic change depends on the location of the port and the population of the port settlements and surrounding area, which is not yet defined, however the expected magnitude of impact can be assessed by considering the change relative to baseline population levels for potential urban or rural port locations.

1.11.26 The port selected to host the O&M base will be the epicentre of activity during this phase. Economic modelling undertaken for employment and presented in the above section indicates that a workforce of 483 FTEs could be required to fulfil direct and indirect contracts in Scotland during the operational phase of the Project.

1.11.27 Given the projected 30-year duration of the O&M phase, it is assumed that most employees will relocate on a long-term basis, accompanied by their families. Based on an assumed population multiplier of 2.35 persons per job to account for family relocation, for the 483 FTEs associated with the Proposed Development, there could be a population increase of up to 1,135 individuals during the O&M phase.

1.11.28 While port locations for construction and marshalling are still under consideration, the Applicant has committed to an O&M port in Aberdeenshire, Aberdeen City or Angus. To assess the scale of impact arising from O&M-related in-migration, the scale of the estimated population increase was calculated relative to the local population for an indicative urban port location and rural port location in this area. Aberdeen City was considered as the indicative urban location, with a population of approximately 265,080, and the port of Montrose in Angus as an indicative rural port, with a population of approximately 35,746 in key settlements in the Arbroath and Montrose TTWA.

1.11.29 For Aberdeen City, the estimated increase in population of 1,135 people would constitute 0.4% of the population, which is small relative to its typical annual population growth rate of 1.1%, so the scale of impact for the urban scenario is considered a low magnitude of change. In the Arbroath and Montrose TTWA, it would constitute 3.2% of the population, greatly exceeding its typical annual population growth rate of 0.1%, so the scale of impact for the rural scenario is considered a high magnitude of change.

1.11.30 The numbers presented above represent a conservative scenario for the scale of population increase concentrated in one area, as it is based on the modelled

employment impacts for the Project as a whole (including employment related to onshore and offshore activities). A proportion of these employees would be associated with the Onshore Infrastructure and therefore may not be located close to the O&M port.

1.11.31 The O&M phase is significantly longer than the construction or decommissioning stages, so it is likely that the workforce would become more embedded within local communities, thereby diminishing the magnitude of any demographic impact over time.

Decommissioning

1.11.32 Demographic effects may arise during the decommissioning phase if job opportunities encourage the retention of local residents or attract new workers. However, the extent of any potential change cannot yet be assessed, as the port location(s) to be used for decommissioning remain unconfirmed. The magnitude of demographic impact will ultimately depend on the characteristics of the selected port and its associated labour pool, including population size, labour market conditions and the availability of relevant skills.

1.11.33 The decommissioning phase is expected to require a smaller workforce and over a shorter duration than the construction phase. As a result, the overall scale of demographic influence is likely to be more limited.

Significance of the Effect

1.11.34 For the Onshore Infrastructure, during the construction and decommissioning phases, the magnitude of the impact is deemed to be negligible, and the sensitivity of the receptor is considered to be medium, therefore a **Negligible** (not significant) effect is expected.

1.11.35 However, the overall effect of demographic changes for construction and decommissioning are uncertain for the Project as a whole at present. This would be largely dependent on the ports selected for construction and decommissioning, around which the workforce would reside. The port(s) required for the construction and decommissioning of the offshore component could be in either an urban or a rural setting, where the characteristics of host communities and socio-economic context is likely to differ. Overall, depending on the chosen port location(s) the magnitude of change to demographics could range from negligible to high and sensitivity could range from negligible to very high. The effect could therefore range from **Negligible** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing demographic conditions at the chosen port location(s).

1.11.36 The O&M phase was scoped out for the onshore assessment of changes to demographics. For the offshore infrastructure, during O&M, the impacts resulting from the modelled rural and urban scenarios (Montrose and Aberdeen City) ranged from **Minor** (not significant) in urban areas to **Major** (not significant) in rural areas.

1.11.37 As outlined in the monitoring commitments (Table 1.20), once port location(s) is known, the Applicant will review the assessment.

IMPACT 3 – CHANGES TO DEMAND FOR HOUSING & LOCAL SERVICES

Approach

1.11.38 The scale of demand for housing, health care, education, local leisure and recreation facilities, public transport, and other community services will be influenced by the total number of jobs generated during both the construction and O&M phases, as well as the proportion of these positions that are filled by workers relocating from outside the local area. A sudden increase in the local population has the potential to exert pressure on existing infrastructure and service provision, which may in turn affect the capacity of residents to access essential community services and facilities.

1.11.39 Changes in demand for local services can have both positive and negative effects. The nature of the effect would depend on the type of service affected and the existing conditions within the area. In some places, population growth can help sustain essential services, while in others it may create additional strain. For example, a rise in the number of school age children in a rural community could strengthen the case for maintaining local education provision. Conversely, overall population increases might intensify pressure on local healthcare services. Therefore, the outcome has the potential to be both positive and negative, particularly if service provision cannot adjust to meet changing demand.

1.11.40 The sensitivity of any changes in housing market demand will be determined by:

- the population of the community;
- the availability of housing or other accommodation within the community;
- the scale of the overnight tourism sector in the community;
- the ability of the housing market to adjust supply to respond to changes in demand; and
- the relative level of housing affordability in the area.

1.11.41 The effect on services will also be determined by factors of sensitivity specific to the potentially impacted communities including the capacity of each service in each area and the ability of the service to adapt to changes in demand.

1.11.42 The magnitude of any change for housing will be determined by the peak level of additional accommodation demand in each area, relative to the baseline accommodation provision, and any demographic changes, determined by the baseline labour supply in each area and the relative size of any transient labour population.

Potential Impacts

Construction

1.11.43 Impacts on the demand for housing and other services are similar to those of demographic changes, as they are largely dependent on the potential strain that a transient workforce could place on local housing markets, tourism accommodation and local services.

1.11.44 During construction of the Project, it is expected that dependent on their role and duration of the contract, the temporary construction workforce would be likely to reside in either tourist accommodation or private rented housing. Increased demand is expected to bring benefits for tourism accommodation providers, providing year-round demand for a service that tends to be seasonal. Dependent on the chosen port location, there is also potential for the Project to have a positive impact on the rental housing market in areas where there is an existing oversupply, such as Aberdeen City.

1.11.45 Conversely, there could be negative impacts on the housing market and tourism accommodation sector, should the extent of demand exceed the existing supply. For residents this could result in an increase in rental prices and/or displacement, and in the longer term, gentrification of the local area. Occupancy of accommodation by the construction workforce could have a negative impact on local tourist attractions and businesses supporting the tourism economy if it prevents tourists from visiting and spending in the area.

1.11.46 The change in demand for housing and local services is likely to be driven by the duration of contracts in place during construction. Temporary, short-term contracts would incur less pressure on these resources, while longer contracts could result in the workforce relocating permanently and bringing their families. This could mean a substantial difference in the scale of demand for housing and services, and the types of services required (e.g. school enrolment for children of workers).

1.11.47 Development and implementation of an Accommodation Strategy has been committed to by the Applicant which will set out how the Project will meet the demand for accommodation from its workforce. Following a review of baseline accommodation options and projected demand, the Strategy will outline plans regarding accommodation plans for workers and will seek to avoid disruption to local accommodation.

1.11.48 The assessment undertaken for the onshore works indicated that, taking into account the relatively low numbers of the workforce at the peak of construction in relation to the high availability of private rental stock and tourist accommodation in the Aberdeen TTWA, in addition to the embedded mitigation of an Accommodation Strategy, there would be negligible change in demand for housing and local services.

1.11.49 The construction periods for the onshore and offshore infrastructure are anticipated to overlap for up to four years. Should the chosen construction port(s) be located within Aberdeenshire or Aberdeen City, there could be a greater impact on housing and local services than that reported for the onshore infrastructure alone. In such circumstances, there may be a greater impact on housing and local service demand. However, as outlined, an Accommodation Strategy is being developed for the Project, which will minimise these impacts as far as is practicable.

Operation and Maintenance

1.11.50 Due to the length of the O&M phase, it is likely that the workforce would become more embedded within local communities, with most employees relocating on a long-term basis, thereby diminishing demographic impacts over time. Population growth is likely to slow down and any impacts on local infrastructure, housing and public services is likely to stabilise. During this phase, it is considered that the permanent workforce will be more reliant on the private rental sector and the purchase of housing and less likely to utilise tourist accommodation. Accordingly, the tourism accommodation sector would not experience benefits from higher year-round occupancy rates. Tourist attractions and the tourism sector more broadly would be less likely to experience potential negative impacts from reduced visitor spend.

1.11.51 Housing pressures are likely to be more pronounced at the beginning of the O&M phase; however, over time it is expected that the local housing market will respond to changes in demand. It is recognised that due to the higher skilled jobs and associated higher pay within the offshore renewables sector, gentrification of local areas could be a risk. Offshore wind projects can make coastal towns newly attractive through job creation, new amenities, and infrastructure investment, bringing more affluent populations into coastal areas, causing housing costs to rise and displacing local residents.

Decommissioning

1.11.52 During decommissioning, impacts on housing and local services are anticipated to be similar in nature to those assessed for the construction phase. However, as there is likely to be a smaller workforce required for decommissioning, which influences demand for housing and local services, a lower magnitude of impact is expected.

Significance of the Effect

1.11.53 The assessment undertaken for the onshore infrastructure reported that the magnitude of the impact is deemed to be minor (construction) and negligible (decommissioning) and the sensitivity of the receptors are considered to be low/high (accommodation stock/local services). Therefore, a **Minor** adverse (not significant) impact on demand for housing and local services during construction and decommissioning for the onshore infrastructure.

1.11.54 Changes to demand for housing and local services during construction and decommissioning arising from the Project as a whole cannot yet be fully assessed until construction and decommissioning port location(s) are confirmed, but this could range from **Negligible** to **Minor** significance (beneficial or adverse), which ranges from not significant to significant in EIA terms. Demand changes would be largely dependent on the ports selected, around which local service capacities and available housing stock is likely to vary.

1.11.55 The O&M phase was scoped out for the onshore assessment of changes in demand for housing and services. As identified through the offshore assessment, depending on the location of the O&M port, the magnitude of

change would be low to high and the sensitivity the receptor from low to high. The significance of the impact will therefore range from **Minor** to **Major** significance. The overall impact will therefore range from not significant (minor) to significant (moderate or major) in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the area.

1.11.56 The Applicant will undertake a review of potential socio-economic impacts following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.

IMPACT 4 – CHANGES TO AMENITY OF LOCAL PUBLIC AND PRIVATE RECEPTORS

Approach

1.11.57 For the Onshore Infrastructure, an assessment of amenity impacts for public and private receptors was undertaken for the construction and decommissioning phases. These effects relate primarily to the environment effects that could occur for receptors in proximity to construction activities associated with onshore (land-based) infrastructure, and therefore this topic not included in the assessment of offshore infrastructure.

1.11.58 Amenity impacts were derived by drawing on residual effects identified in other environmental topic chapters in the BOWF Onshore EIA Report: Volume 1, Chapter 6: Land Use; Volume 1, Chapter 8: Agriculture and Public Access; Landscape and Visual Volume 1, Chapter 12: Air Quality; Volume 1, Chapter 13: Noise and Vibration and Volume 1, Chapter 14: Traffic and Transport.

1.11.59 In the context of the assessment, public and private receptors relate to the following:

- Public services: community facilities such as schools, places of worship, and public parks.
- Private services: commercial businesses such as retail stores and holiday accommodation.

1.11.60 Public and private receptors included in the assessment have been identified using AddressBase data, which was extracted using a 500m buffer from the PPP Application Boundary (BOWFL, 2025).

1.11.61 Receptors were mapped against any significant effects identified for other relevant topics of the EIA, Volume 1, BOWF Onshore EIA Report (BOWFL, 2025). If significant residual effects are identified on these receptors, the assessment will consider if the receptors are sensitive to the particular environmental effect identified. Users of these receptors who may be particularly vulnerable to impacts are taken into consideration; for example, children attending a local school that may experience noise impacts. In the context of a commercial receptor, this could be a hotel with a scenic view that would be more sensitive to visual impacts.

1.11.62 Where two or more significant residual effects are identified on a receptor, this will constitute an in-combination amenity effect. This will be considered in

relation to how people may be deterred from using the receptor as a result of changes in amenity.

1.11.63 The existence of a standalone or in-combination effects in relation to other chapters does not automatically translate into a significant effect on public and private receptors. Where relevant, these impacts have been analysed on a standalone basis with consideration of sensitivity of receptor and magnitude of overall amenity impact to determine significance.

Potential Impacts

1.11.64 This section makes reference to chapters included within Volume 1 of the BOWF Onshore EIA Report (BOWFL, 2025).

Construction

1.11.65 Within Volume 1, Chapter 14: Traffic and Transport, four locations - two on Auchenblae Road and two on Broomhill Road, both within Stonehaven - were identified as likely to experience significant effects on amenity for non-motorised users. However, post-mitigation these are confirmed to reduce to minor (not significant) residual effects.

1.11.66 Volume 1, Chapter 13: Noise and Vibration identifies no significant construction-phase noise or vibration effects when best-practice measures are implemented. Although potential significant effects were predicted on minor roads used for construction traffic, specifically C1K (south of the onshore component of the Project), C20K (south of the A90), and C14K (west of Three Wells), these are expected to be effectively managed via the Construction Traffic Management Plan. Therefore, no significant effects on public and private receptors as a result of noise and vibration impacts are anticipated.

1.11.67 The study area includes the settlements of Arbuthnott, Benholm, Buckie's Mill & Newmill, Drumlithie, Gourdon, Inverbervie, Johnshaven, Rickarton, and Tannachie, as well as scattered individual properties. Access to these public and private receptors during construction will be maintained via diversions and phased works. Volume 1, Chapter 6: Land Use, Agriculture and Public Access confirms that residual effects for Private Property and Housing and Community Land and Assets will be minor (not significant), meaning no significant amenity impacts relating to access or land-use change.

1.11.68 Volume 1, Chapter 8: Landscape and Visual reports a moderate adverse significant residual effect at Viewpoint 2: Drumlithie / Mid Kinmonth Circular Core Path, in proximity to St. John's Baptist Church (within 200 m) and Glenbervie School (within 100 m). However, these community receptors are located within Drumlithie village and are surrounded by other buildings, therefore would not be impacted by a change in view at Viewpoint 2. Landscape specialists have confirmed that no significant residual visual effect would be expected for these community receptors.

1.11.69 Volume 1, Chapter 8: Landscape and Visual (Volume 2, Appendix 8.2: Properties Assessment) assesses impacts on individual dwellings and property clusters. These were reviewed in relation to holiday homes that corresponded with the

dwellings identified in Volume 2, Appendix 8.2: Properties Assessment. Residual effects reported were as follows:

- 1 and 2 Annamuick Cottages (Clerkswell Cottage and Downswell Cottage, Tannachie): minor (not significant)
- Smiddy Cottage, Rickarton: minor (not significant)
- Bloomfield Steading and Cottage, Arbuthnott: minor (not significant)
- Accordingly, for these receptors it is not expected that visual effects would result in an impact on business functionality.

1.11.70 Glenbervie School is identified as a high sensitivity receptor in Volume 1, Chapter 12: Air Quality in the assessment of construction dust impacts as it is situated 100 m to 250 m from the PPP Application Boundary. Appropriate best practice construction dust management mitigation measures detailed within the outline CEMP are based on those outlined in the Institute of Air Quality Management dust guidance. With the implementation of appropriate dust mitigation measured outlined in the CEMP, dust risks from construction will be reduced and no likely significant effects are expected.

Decommissioning

1.11.71 The effects reported from the environmental topics for decommissioning are anticipated to be the same as for construction. This is considered to be a conservative approach as decommissioning would generally involve less plant, a smaller construction workforce, and a shorter duration of activity.

Significance of the Effect

1.11.72 The assessment undertaken for the onshore infrastructure reported that the magnitude of the impact is deemed to be negligible and the sensitivity of the receptors are considered to be high. The effect of the Project's construction and decommissioning phases on the amenity of public and private receptors will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

IMPACT 5 – CHANGES TO TOURISM AND RECREATION RECEPTORS

Approach

1.11.73 The tourism and recreation assessment is based on the sensitivity of the tourism economy, tourism and recreation receptors in the Tourism and Recreation Study Area and the magnitude of any potential change in behaviour.

1.11.74 Changes to tourism and recreation receptors are focused on how the Project could result in changes to the amenity value of the receptor arising from environmental effects and therefore affect visitor/user behaviour. For the offshore assessment, relevant environmental impacts are derived from the following EIA topics: Volume 2, Chapter 14: Shipping and Navigation; Volume 2, Chapter 16: Infrastructure and Other Users; Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts; and Volume 2, Chapter 21: Cultural Heritage. Relevant chapters for the onshore assessment are: Volume 1, Chapter 6: Land Use, Agriculture and Public Access, Volume 1, Chapter 8: Landscape and Visual,

Volume 1, Chapter 13: Noise and Vibration, and Volume 1, Chapter 14: Traffic and Transport.

1.11.75 Visual receptors identified within the Seascape, Landscape and Visual Impacts Study Area that have been considered within this assessment include but are not limited to, the following receptors:

- walkers, equestrians and cyclists using the public rights of way networks;
- users of beaches, public open spaces and common land;
- tourists and visitors using facilities such as hotels and cafes within settlements;
- tourists and visitors at coastal caravan and camping sites; and
- tourists and visitors at attractions and points of interest.

1.11.76 As noted in the seascape, landscape and visual assessment, the viewpoints are *'considered to be representative of views available to recreational receptors in proximity'*. Accordingly, a buffer was applied to these to determine whether additional tourism and recreation receptors were located close by that could also be impacted; specifically, coastal paths and tourist accommodation. These receptors, in addition to those identified in the Volume 2, Chapter 21: Cultural Heritage, have been considered in the tourism and recreation assessment in terms of how visitor behaviour could be affected.

1.11.77 If significant residual effects are identified on these receptors in the relevant EIA chapters, the tourism and recreation assessment will consider if the receptors are sensitive to the particular environmental effect identified. This will be considered in relation to how visitor behaviour could change as a result of changes in amenity and whether this could impact on the Tourism and Recreation Study Area economy.

1.11.78 The existence of a standalone or in-combination effect in relation to other topics will not automatically translate into a significant effect on tourism and recreation. These impacts will be analysed on a standalone basis with consideration of sensitivity of receptor and magnitude of overall amenity impact to determine significance.

Potential Impacts

Construction

1.11.79 During construction, following implementation of best practice measures and embedded mitigation through the CEMP and CTMP—there are no significant residual effects reported for construction dust, traffic and transport and noise and vibration that correspond to tourism and recreation receptors associated with the onshore infrastructure.

1.11.80 For the onshore infrastructure, the main construction-related impacts arise from temporary visual changes affecting certain recreational routes. significant adverse visual effects during construction are reported for users of NCN 1, the Mid Kinmonth Circular Core Path, and walkers in Fetteresso Forest Recreational Area, where construction elements would be prominent within local views for

varying durations. Additional impacts are identified for certain core paths and cycle networks, including the Coastal Path between Johnshaven and Gourdon. Some routes may experience increased journey lengths due to diversions, though these impacts would be temporary and reversible.

1.11.81 Potential amenity impacts for visitors to Fetteresso Forest Recreational Area and associated paths in relation to visual impact, disruption and diversions are considered in the context of the existing commercial activity, where existing tracks into the substation are currently maintained for forestry operations.

1.11.82 For the offshore infrastructure, impacts arising from the construction phase from the related environmental topics are at minor to moderate significance, with Embedded Mitigation reducing potential effects. Visual changes associated with turbine and OSP installation are short term, reversible, and of low magnitude, resulting only in temporary effects on landscape character and quality experienced at tourism and recreation receptors. As these construction impacts are short-term and do not alter the baseline environment, overall, there are no lasting effects on tourism and recreation receptors.

1.11.83 Research focused on the construction phase of offshore wind developments, including a Biggar Economics (2020) analysis of 11 comparable case study areas in England, found no empirical link between offshore wind construction activities and negative tourism outcomes. Instead, tourism performance remained stable during construction, with no observed reductions in visitor numbers, spending, or tourism-related employment. Collectively, these findings indicate that any construction-related effects are likely to be temporary, localised, and unlikely to influence tourism (Biggar Economics, 2020).

Operation and Maintenance

1.11.84 During the O&M phase, visibility of the substation associated with the onshore infrastructure would be largely confined to a small number of nearby Fetteresso Forest paths within 1 km, with no views from most local routes including the Fetteresso Forest Circular. At the Worst-Year-of-Operation (WYO), earthworks and felling around the substation would remain clearly visible from some paths, resulting in moderate to major adverse residual effects, particularly for walkers at Hill of Swanley where the substation would form a prominent focal point in the landscape. However, as mitigation planting matures, these visual impacts would diminish substantially, reducing to minor or moderate by Scenario Year 12 (SY12) and ultimately merging into the wider forested context.

1.11.85 Visitors at several coastal viewpoints—including Slains Castle, Torry Battery, Girdle Ness Lighthouse, Baron's Cairn and Muchalls—would experience moderate, long-term but reversible impacts on seascape views arising from the Offshore Infrastructure, with sensitivity greatest at Slains Castle and along the Muchalls coastal path where open sea vistas are highly valued. At Whinnyfold and Collieston, moderate (significant) visual effects are also predicted, but these are expected to be less influential in a tourism context because recreational users are less sensitive to changes that do not affect their everyday outlook. Tourism accommodation near Girdle Ness Lighthouse—Lighthouse Cottage and Northern Lights Apartments—would experience lower levels of

impact than the viewpoint itself due to screening by buildings and boundary walls, limiting visibility of the development. From the Aberdeen–Orkney ferry, recreational passengers and workers would see distant turbines forming a noticeable but not dominant feature on the horizon; as these receptors experience transient, medium-sensitivity views, the resulting moderate, long-term, reversible effect is considered significant but not likely to strongly influence visitor behaviour.

1.11.86 Tourism and recreational receptors in the onshore assessment were primarily cultural and nature-based assets, including wildlife reserves, woodlands, and museums. Whilst these receptors were mostly inland, the receptors identified within the offshore assessment were situated along the coast, including lighthouses, beaches, and marine recreation facilities. Dunnottar Castle was the only receptor with the potential to be impacted by both the onshore and offshore assessments, for the O&M phase only. The onshore assessment considered this receptor in relation to traffic and transport (vehicular access from the A92), while the offshore assessment considered this receptor in relation to its setting as a cultural heritage asset. No significant residual effects on this receptor were reported.

1.11.87 A survey on public perceptions of offshore wind farm developments undertaken by the Scottish Government (2022) looked at the impacts of offshore wind farms on tourist behaviour during the operational phase. It reported that only 5% of residents of Scotland said that they had ever deliberately avoided visiting an area where they knew that offshore Wind Turbines were visible from shore (with 88% saying they had never done this). The vast majority of respondents reported that they do not avoid having a holiday in Scotland because of visible Wind Turbines.

1.11.88 Findings from a wider review of UK and international literature and environmental statements support this, showing that predicted adverse effects on tourist numbers, visitor expenditure, and overall tourism experience are generally low and usually relate to perceived visual change, which decreases with distance from shore and typically diminishes over time. The review also considerers evidence from operational OWFs further indicates shows little to no measurable decline in tourism activity, and in some cases neutral or positive effects have been reported, including increased visitor interest associated with renewable energy infrastructure, boat tours, and visitor centres (Glasson *et al.,* 2022).

1.11.89 Taking into account the findings of the relevant environmental topic assessments, impacts on marine recreation and small vessel activity are expected to be appropriately managed throughout the O&M phase by implementation of embedded mitigation measures. No changes to cultural heritage receptors are expected that would affect appreciation of the assets. Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment reports some moderate significant effects on tourism and recreation receptors. However, evidence gathered from various studies indicated that the extent to which these would have an impact on tourism and recreation in the study area

would be minimal. The magnitude of impact on tourism and recreation during operation is therefore considered to be low.

Decommissioning

1.11.90 The effects reported from the environmental topics that inform the assessment of changes to tourism and recreation for decommissioning are anticipated to be similar as for construction. This is considered to be a conservative approach as decommissioning would generally involve less plant, a smaller construction workforce, and a shorter duration of activity.

Significance of the Effect

1.11.91 Overall, for both the onshore and offshore infrastructure, during construction the magnitude of the impact is deemed to be low, and the sensitivity of the receptor is also considered to be low. The effect will therefore be **Minor** adverse significance.

1.11.92 During O&M phase, for the onshore infrastructure the magnitude of the impact is deemed to be negligible and the sensitivity of the receptor is considered to be low. The effect will therefore be of **Negligible** adverse significance. For the offshore infrastructure, the magnitude of the impact is deemed to be low, and the sensitivity of the receptor is considered to be low. The effect will therefore be of **Minor** adverse significance.

1.11.93 For Decommissioning, for both the onshore and offshore infrastructure, the magnitude of the impact is deemed to be negligible, and the sensitivity of the receptor is considered to be low. The effect will therefore be of **Minor** adverse significance.

1.11.94 Considering both elements of the Project together, it is not anticipated that there would be an additive effect on tourism and recreation. Embedded mitigation and monitoring measures are across the onshore and offshore elements for the related environmental topics considered to appropriately address the potential impacts arising from the Project as a whole. Additionally, the wider evidence base showing no demonstrated link between wind energy developments and reduced tourism demand. Therefore, an overall effect of **Minor** adverse is anticipated for all three phases, which is not significant in EIA terms.

IMPACT 6 – SOCIO-CULTURAL IMPACTS

Approach

1.11.95 Socio-cultural impacts refer to the effects that a development or project may have on the social fabric, cultural identity, and everyday life of communities. These impacts can include changes in community cohesion, quality of life and wellbeing, and the character of local areas.

1.11.96 The assessment of socio-cultural impacts for the onshore infrastructure focussed on the communities living in proximity to the construction activities and substation, within the Electoral Ward Areas of Mearns and Stonehaven and Lower Deeside. The Electoral Ward Area of Mearns, specifically the settlements

of Gourdon and Johnshaven, was also considered for the Offshore Infrastructure in relation to impacts associated with activities around Landfall.

1.11.97 As the construction and decommissioning ports have not yet been selected, the local communities that would be affected by the activities associated with the offshore infrastructure during these phases are currently unknown. For O&M, socio-cultural impacts are considered broadly in relation to coastal communities.

1.11.98 The marine environment plays a vital role in supporting the health and prosperity of coastal communities. It sustains a wide variety of marine life and underpins local industries such as fishing, tourism, and recreation. People living in coastal areas often have a strong connection to the coast and marine environment, which can positively influence both physical and mental wellbeing. The assessment considers how the Project could influence such factors and thereby affect the wellbeing of coastal communities.

1.11.99 The assessment of socio-cultural impacts is qualitative, drawing on the socio-economic baseline of the area and utilising outputs from the other socio-economic, tourism and recreation sub-topics. The assessment considers the research undertaken by Scottish Government in relation to public perceptions of OWFs, and available evidence from communities with a similar previous experience of offshore wind. It has also been informed by the wider stakeholder engagement exercise. Vulnerable population groups in who may be disproportionately impacted by the offshore activities and infrastructure (e.g. fishing communities) are also considered where relevant.

Potential Impacts

Construction

1.11.100 Local communities around the onshore infrastructure, construction traffic routes, and at potential port locations may experience some temporary disruption and related stress during construction arising from environmental effects and the presence of a transient workforce. The main clusters of housing in proximity to the onshore infrastructure are the villages of Arbuthnott, Benholm, Buckie's Mill & Newmill, Drumlithie, Gourdon, Inverbervie, Johnshaven, Rickarton and Tannachie. Best practice construction measures and embedded mitigation, including preparation of a CEMP and CTMP, are expected to reduce effects on these communities. A Community Engagement Strategy would be developed as part of the CEMP which would include keeping local residents informed of construction activities and timings prior to and during the works. The construction workforce will follow best practice requirements and a Code of Conduct in and around the site and within local communities, and an Accommodation Strategy will be prepared to mitigate changes in demand for housing and local services.

1.11.101 While the export cable corridor extends north towards Gourdon, Landfall will be over 1km south of the village. Johnshaven is situated further south of the export cable corridor, over 2 km from Landfall. Due to the distance, it is

considered that these communities are unlikely to experience disruptive effects arising from the offshore elements of the Project.

1.11.102 Baseline data gathered for the onshore assessment found that a core aspect of the social fabric of the local communities is access to nature. Communities value the creation and maintenance of active travel and recreational facilities, such as forest paths, other footpaths and cycle routes. While most environmental effects on community and commercial assets are assessed as not significant, several recreational routes around the onshore infrastructure—particularly around Fetteresso Forest Recreational Areas—will experience temporary visual and access impacts, which may be felt more strongly by local residents who rely on these areas for wellbeing. However, these impacts will be mitigated through phased construction, reinstatement of paths, and measures outlined in the CEMP and CTMP.

1.11.103 Similarly, the marine environment plays a vital role in supporting the health and prosperity of coastal communities in the Regional Socio-Economics Study Area. It sustains a wide variety of marine life and underpins local industries such as fishing, tourism, and recreation. For instance, Peterhead is the largest fishing port in Europe, supporting thousands of local jobs. Furthermore, people living in coastal areas often have a strong connection to the coast and marine environment, which can positively influence both physical and mental wellbeing. Thus, disruption in these coastal areas, such as the disruption and/or displacement of local fishing activities due to access restrictions, could have an adverse impact on livelihoods and socio-cultural identities in coastal communities. However, this may be mediated by increased employment opportunities in the region due to the vast expansion of renewable energy. Positive socio-cultural impacts may also arise in the long term, as offshore wind generation supports wider community values of environmental sustainability, and will also help to curtail climate impacts on coastal infrastructure, which is core to community way of life and wellbeing.

1.11.104 The Project would provide opportunities during construction for employment in high-quality, skilled jobs that are future-ready; these roles are likely to be attractive to employees seeking diversification from the oil and gas sector, and who may be experiencing job insecurity due to the decline of the industry. Insecure and precarious work is associated with poorer health outcomes and particularly worse mental health (Commission for Healthier Working Lives, 2024). Accordingly, improving job security could result in better physical and mental wellbeing outcomes for people living in the local area who are able to transition from oil and gas to the renewables sector.

1.11.105 Analysis of employment impacts undertaken for the Commitment scenario indicates that approximately 725 FTE jobs in Scotland could be supported during construction of the Project. These opportunities will also create demand for a broader range of support roles across the supply chain, enabling indirect employment benefits for workers in adjacent industries and supporting businesses. A total of 368 FTEs in Scotland are anticipated to be supported indirectly through the supply of goods and services to the Project and its contractors. This includes potential benefits for local small and medium-sized

enterprises, particularly within sectors such as retail, food and drink, accommodation, transport, and other service industries, driven by increased demand associated with the temporary influx of construction workers and ongoing port-related activity. This could have a positive impact on local economies and community wellbeing.

1.11.106 Construction port locations are not yet confirmed; however, there are no potential port locations within the local study area for the onshore infrastructure. The communities that would be affected by the onshore and offshore elements would be different and as a result, there is not expected to be a combined socio-cultural impact on communities during construction.

Operation and Maintenance

1.11.107 During the O&M phase, socio-cultural effects may arise in relation to community cohesion, local perceptions, wellbeing, and employment. O&M activities for the Project are expected to be less intensive than construction, carried out by a smaller workforce conducting inspections, monitoring, and routine maintenance. Nearby communities, including Gourdon and Johnshaven, are not expected to experience sustained amenity changes, as coastal access will remain open and any visual effects from offshore maintenance vessels would be temporary and infrequent.

1.11.108 Demographic impacts and demand for housing and local services will depend on which ports host the O&M workforce, with potential effects ranging from minor to major, depending on whether the port is located in a rural or urban location. While some communities may feel pressure from population increases or perceive changes to local character, others could benefit from revitalisation, increased participation in community life, and more resilient local economies. Long-term skilled jobs in turbine maintenance and marine operations, along with indirect supply-chain activity, are expected to support local economic stability. Findings from a study undertaken by the Research Studies Association (2023) found a positive effect of offshore wind energy investment on the local economy of remote deprived communities in the UK. The study reported that increasing installed capacity by the size of an average offshore wind farm generates a 10% growth in employment and a 20% increase in firm entry in industries operating nearby the infrastructure servicing these farms (Vanino, 2023).

1.11.109 Overall, while some adverse socio-cultural effects could arise—such as changes to demographics, local services, and community identity—these are balanced by opportunities for economic uplift, improved social cohesion, and long-term wellbeing benefits linked to renewable energy generation and climate resilience. During the O&M phase, the move to lower-intensity operations is likely to reduce uncertainty and support a return to normal conditions within coastal and port communities. Evidence from operational offshore wind developments indicates that communities tend to adapt over time, particularly where ongoing activity does not disrupt daily life.

1.11.110 Port locations are not yet confirmed for O&M; however, there are no potential port locations within the local study area for the Onshore Infrastructure. The

communities that would be affected by the onshore and offshore elements would be different and as a result, there is not expected to be a combined socio-cultural impact on communities during O&M.

Decommissioning

1.11.111 The decommissioning phase is expected to involve a reduced workforce and take place over a shorter duration compared with the construction phase. Social cohesion and identity of communities living near the onshore infrastructure and around port towns could be impacted by changes to demographics and demand for housing and local services arising from the decommissioning workforce, and changes to the local industries on which livelihoods may be reliant, such as fishing. However, these effects are anticipated to be of a lesser extent than for construction.

1.11.112 The assessment of socio-cultural impacts for the Onshore Infrastructure was scoped out for the decommissioning phase.

Significance of the Effect

1.11.113 For the onshore assessment, during the construction phase, the magnitude of the impact in relation to socio-cultural impacts is deemed to be low and the sensitivity of the receptor is considered to be high. Due to the importance of community cohesion in rural communities and the importance of preserving the character of the local area, the higher significance rating of **Moderate** is deemed to be the most likely, which is significant in EIA terms. During the O&M phase, the magnitude of the impact is deemed to be negligible, and the sensitivity of the receptor is considered to be high. Overall, impacts are expected to be **Minor** adverse (not significant).

1.11.114 For the offshore assessment, the magnitude of socio-cultural impacts would range from medium to high and the sensitivity of the receptor would vary from low to high depending on the location of the port used in each project phase. The effect will therefore be of **Minor** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the community and perceptions of the Project.

1.11.115 As outlined in Table 1.20, the Applicant will review the assessment following a decision on the construction and O&M ports.

Additional Mitigation and Residual Effect

1.11.116 Both the onshore and offshore components are considered likely to have a significant adverse socio-cultural impact. Accordingly, Additional Mitigation by the Applicant is proposed to reduce potential impacts:

- The Applicant will consult with relevant stakeholders to identify opportunities for betterment to these recreational areas and/or other local recreational areas. This could be delivered via the provision of community benefit funds associated with the Project.

- The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

1.11.117 Following implementation of these measures, the socio-cultural impacts arising from the onshore elements are expected will reduce to minor adverse significance, which is not significant in EIA terms. The overall significance of socio-cultural impacts is also likely to reduce for the offshore elements, though until ports have been selected and further measures have been developed to support communities, it is not possible to ascertain the extent of the reduction and the residual significance.

1.12 Cumulative Effects Assessment

Approach

1.12.1 The Cumulative Effects Assessment (CEA) assesses the impact associated with the Project together with other relevant projects and activities. Cumulative effects are defined as the effect of the Project in combination with the effects from several different projects, on the same receptor or resource. Further details on CEA methodology are provided in Volume 1, Chapter 4: EIA Methodology (BOWF Offshore EIA Report).

1.12.2 This section summarises the key impacts identified in the CEA. The full CEA screening, list of projects and assessment is provided in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation (BOWF Onshore EIA Report) and Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation of this Offshore EIA Report.

IMPACT ON GVA, EMPLOYMENT AND SUPPLY CHAIN

Potential Impacts

1.12.3 Competition for specialist materials, port capacity, and skilled labour across multiple OWF projects could create supply chain constraints during overlapping construction phases, potentially reducing the Project's ability to source Scottish content and diminishing expected employment and GVA benefits. However, the expanding offshore wind pipeline is driving major investment in Scotland's renewables supply chain, including new subsea cable factories, proposed turbine-blade manufacturing facilities, and the expansion of Port of Cromarty Firth for large-scale floating turbine production. Repurposing skills from the declining oil and gas sector and coordinated workforce planning across OWF developers could further alleviate capacity pressures.

1.12.4 Scottish Government policy identifies offshore wind as a key driver of economic transformation and a replacement for oil and gas jobs, and the Applicant has already demonstrated strong local supply-chain engagement. Although uncertainties remain around port selection, construction sequencing, and procurement demands across multiple projects, increasing national investment and government support for supply chain expansion are expected to balance out potential competition effects. Overall, while supply shortages may limit

some benefits, growing capacity across Scotland's renewables sector is likely to offset most cumulative impacts.

1.12.5 During O&M, cumulative impacts on GVA and employment could arise from similar energy infrastructure projects that are operational at the same time as the Project. Positive and negative impacts in relation to challenges and opportunities associated with increased supply chain demand are expected to be similar as those identified for the construction phase. However, as the O&M phase is expected to be 30 years long, there will be more time for the supply chain to adapt to changes in demand and increase capacity gradually, resulting in greater potential for positive effects.

1.12.6 The Applicant has a continuing programme of engagement across range of marshalling and O&M ports, exploring opportunities for complimentary investments, leveraging shareholder capability and know how. The Applicant is providing support to ports to inform the efficient buildout of the infrastructure required to construct OWF projects. This includes provision of detailed information on evolving requirements to help inform port design, usage and sequencing of activity to accommodate the Applicant's needs alongside a range of others, and coordinating with other projects to explore potential to facilitate sequential delivery of multiple OWF projects.

1.12.7 Decommissioning of OWF projects is expected to require similar materials and skills to construction. Projects with decommissioning phases that overlap with the construction phase for the Project could therefore result in cumulative effects, similar to those reported above for construction.

Significance of the Effect

1.12.8 Overall, the Project is not expected to give rise to significant cumulative impacts on GVA and employment. Other offshore wind developments may contribute to limited, short-term competition for materials, labour, or port capacity; however, these effects are anticipated to be minor and not significant.

IMPACT ON DEMOGRAPHICS, DEMAND FOR HOUSING AND LOCAL SERVICES, AND SOCIO-CULTURAL FACTORS

Potential Impacts

1.12.9 Overlapping construction periods for several OWF developments could create cumulative demographic impacts, as multiple projects are likely to draw on the same temporary construction workforce within the regional TTWA. Workers may remain in the area longer to move between projects, potentially relocating with their families and contributing to a more sustained population increase. This could heighten cumulative demand for housing, healthcare, and education services, although longer contract durations could also help integrate workers into local communities and support social cohesion.

1.12.10 Multiple projects constructed concurrently could also intensify pressures on coastal character and valued natural environments, potentially affecting the sense of place and wellbeing of rural and coastal communities. The CEA for the Onshore Infrastructure assessed a cumulative socio-cultural impact of **Moderate** adverse, considered as significant, due to the presence of multiple

developments that could affect the character of the local area and community wellbeing. However, because different communities would be affected by offshore and onshore elements, the offshore elements of the Project are considered unlikely to contribute to the cumulative effect on the communities located in proximity to the Onshore Infrastructure.

1.12.11 During the O&M phase, as the regional offshore wind pipeline grows, overlapping operational phases are expected to create long-term skilled jobs and drive the formation of O&M "hubs" around key ports, increasing demand for housing and local services. It is anticipated that these hubs would work in collaboration with local authorities, government bodies and developers to unlock opportunities and address regional and local challenges, including demand for housing and services. Over time, these clustered developments will boost the region's role in climate mitigation, strengthening coastal environmental resilience and providing indirect community benefits through stable employment and a healthier natural environment.

1.12.12 Should decommissioning of the Project occur at the same time as construction or decommissioning of other offshore wind projects in the same area, similar impacts related to changes in demographics would be similar as those identified for the construction phase.

Significance of the Effect

1.12.13 The cumulative impact on demographics, demand for housing and local services, and socio-cultural factors impacts arising from overlapping offshore wind activities will depend largely on future port selection and workforce distribution. While there is potential for temporary cumulative pressures on population, housing, and local services during construction and decommissioning, these would be determined based on the characteristics of the host communities in the port locations. The Project's offshore elements are unlikely to contribute meaningfully to cumulative socio-cultural impacts associated with Onshore Infrastructure.

1.12.14 The Applicant has committed to the preparation of an Accommodation Strategy to determine how the project will meet the demand for accommodation from its workforce, providing clarity on accommodation for workers and avoiding disruption to local accommodation. The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations.

1.12.15 As outlined in the monitoring commitments (Section 1.10), once port location(s) is known, the Applicant will review the assessment.

IMPACT ON TOURISM AND RECREATION RECEPTORS

Potential Impacts

1.12.16 For the offshore elements, overlapping construction activities with other offshore wind farms may result in temporary displacement of recreational marine activities, small vessel deviations, and short-term visual effects from vessels, turbines, and offshore infrastructure. These effects were assessed as

minor or none/minor in Volume 2, Chapter 16: Infrastructure and Other Users of this Offshore EIA Report, as sufficient sea room available for recreational and commercial vessels and the temporary nature of Safety Zones will help to minimise disruption. Standard Embedded Mitigation such as Notices to Mariners, Kingfisher Bulletins and navigational warnings will ensure that recreational users can plan activities safely.

1.12.17 Onshore, overlapping construction with several grid and renewable energy developments - including the Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation and Fetteresso 132 kV Substation Upgrade - may lead to combined visual, noise, access, and traffic-related effects that could influence visitor experience. However, these were assessed as not significant, with the relevant environmental topic chapters reporting no cumulative effects and noise levels remaining below recognised construction thresholds. Ongoing engagement with local authorities, recreational groups and communities through the CEMP will further reduce the risk of amenity impacts. The CEMP will set out best-practice measures for managing noise, dust, visual effects and disruption, alongside a Code of Conduct and a Community Engagement Strategy. Separate engagement with recreational groups will ensure their access needs and concerns are addressed throughout construction. It is considered likely that the other developments identified will have similar provisions included as part of their respective CEMPs.

1.12.18 During O&M, cumulative interactions associated with the Offshore Infrastructure include minor deviations for small recreational vessels and limited displacement of water-based activities, though these remain minor with no significant changes to visual receptors. Offshore visual cumulative effects were assessed as none/minor in the Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts of the this Offshore EIA Report, due to the distances involved and the relative dispersion of developments.

1.12.19 For the onshore components, some significant cumulative visual effects were identified for people using paths within the Fetteresso Forest Recreational Area, due to the combined presence of multiple energy and grid projects (including Craigneil Windfarm, Glenskinnan Renewable Energy Park and the Hurlie Substation). However, extensive UK research on tourism and wind energy developments indicates no measurable effect on tourist behaviour, visitor numbers or expenditure, even where multiple wind turbines are present. The Hurlie Substation socio-economic assessment similarly identified no significant tourism or recreation impacts. Outside the local area, no significant cumulative effects are anticipated for wider tourism receptors. Key assets such as Dunnottar Castle are not subject to significant residual or cumulative impacts.

1.12.20 For both the offshore and onshore elements, decommissioning effects are expected to be similar in nature and scale to construction impacts. Although the timing of decommissioning for other developments is uncertain, if overlap occurs the combined effects would still be expected to fall within the minor adverse range, given their temporary duration and the availability of Embedded Mitigation.

Significance of the Effect

1.12.21 The Project is not expected to result in any significant cumulative effects on tourism and recreation receptors. Cumulative effects in the relevant EIA topic chapters for the Project are generally assessed as Minor adverse or None/Minor, reflecting temporary and reversible interactions and the effectiveness of embedded mitigation. Additionally, the wider evidence base showed no demonstrated link between wind energy developments and reduced tourism demand.

DISRUPTION/DISPLACEMENT OF COMMERCIAL FISHING ACTIVITIES, AND POTENTIAL FOR RESULTING SUPPLY CHAIN, EMPLOYMENT AND SOCIO-CULTURAL IMPACTS

Potential Impacts

1.12.22 The Project may have indirect effects on the wider supply chain and local employment, leading to associated socio-economic impacts as reduced fishing activity influences processing, distribution and other dependent industries."

1.12.23 The cumulative assessment for commercial fisheries identifies that while multiple offshore wind developments and Marine Protected Area management measures may create reduced access to fishing grounds and displacement of activity, the contribution of the offshore elements of the Project to these regional cumulative effects is limited. Volume 2, Chapter 13: Commercial Fisheries reports a Moderate adverse cumulative effect for UK demersal otter trawl/seine and scallop dredge fisheries at the sector level; however, once the Fisheries Monitoring and Management and Co-existence Plan (FMMCP) is applied, the residual cumulative effect reduces to Minor adverse, and therefore not significant in EIA terms.

Significance of the Effect

1.12.24 Given the limited contribution of the Project to wider access restrictions, no significant cumulative impacts are anticipated on the fishing supply chain, employment, or fishing community livelihoods. Socio-cultural effects associated with dependence on fishing activity are therefore also assessed as not significant.

1.13 Transboundary Effects

1.13.1 Transboundary socio-economic, tourism, and recreation effects for the offshore and onshore elements of the Project were scoped out and require no further assessment.

1.14 Summary of Impacts, Mitigation, Likely Significant Environmental Effects and Monitoring

1.14.1 The Project has the potential to support a considerable level of economic activity in Scotland and the UK over the full project lifecycle (construction, O&M and decommissioning).

1.14.2 The Project will contribute to meeting Scotland's and the UK's net-zero targets and supports the decarbonisation of economic activity. The Project expenditure

will drive economic activity and stimulate local industries through the GVA and jobs that it supports.

1.14.3 A refresh of the Bowdun OWF SCDS is being undertaken in 2026 to reflect the changing investment and supply chain landscape. The revised expenditure figures developed for the 2026 SCDS have informed the quantitative assessment of GVA and employment impacts presented in Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation of the Bowdun OWF Offshore EIA Report and in this technical report. The updated GVA and employment effects reflect the increased spend - particularly in manufacturing and fabrication in Scotland - beyond the 2023 SCDS Commitments which informed the assessment of GVA and employment impacts presented in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation of the Bowdun OWF Onshore EIA Report (BOWFL, 2025).

1.14.4 As with spending, GVA and employment impacts are inclusive (i.e. impacts in the UK include those occurring across Scotland). Across the full project lifecycle (construction, O&M and decommissioning) it is expected that under the updated Scenario 1 ('Commitments' scenario), the Project would support:

- Employment of 23,478 aFTEs (2,087 FTEs), and £1,934 million GVA in Scotland; and
- Employment of 34,224 aFTEs (5,083 FTEs) and £2.5 billion GVA across the UK.

1.14.5 The Applicant has committed to locating an O&M port within Aberdeenshire, Aberdeen City or Angus (the Regional Socio-Economics Study Area). As construction and marshalling ports have not yet been selected, GVA and employment effects were assessed for the Regional Socio-Economics Study Area for the O&M phase only. It is expected that during this phase, the Project would support 6,279 aFTEs (209 FTEs), a **Major** beneficial (significant) effect; and generate £522 million GVA in the Regional Socio-Economics Study Area, a **Moderate** beneficial (significant) effect.

1.14.6 The Project presents a strategic opportunity to integrate the existing Scottish oil and gas supply chain firms into the offshore wind sector via a supply chain pathways programme aimed at facilitating the transition of traditional energy service providers into renewable energy markets. The Applicant's supply chain strategy seeks to address structural barriers that have historically limited local participation in offshore wind development, particularly the dominance of Tier-1 contractors. The Applicant remains committed to engaging local suppliers and supporting growth in the regional and Scottish supply chain, as set out in the Bowdun Offshore Wind Farm SCDS (Thistle Wind Partners, 2023).

1.14.7 In cases where the is a potential for significant socio-economic effects arising from the Project, Additional Mitigation by the Applicant is proposed. Additional Mitigation comprises:

- **Onshore Infrastructure:** Consulting with relevant stakeholders to identify opportunities for betterment to the recreational areas and paths around

the onshore infrastructure (SOCIO2). This could be delivered via the provision of community benefit funds associated with the Project.

- **Offshore Infrastructure:** Retaining involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

1.14.8 The CEA for the Onshore Infrastructure assessed a cumulative socio-cultural impact of **Moderate** adverse (significant) during the construction phase, due to the presence of multiple developments that could affect the character of the local area and community wellbeing.

1.14.9 Residual effects for each phase of the onshore and offshore components of the Project, and both elements combined, are presented in Table 1.26.

Table 1.26: Summary of Residual Socio-Economic, Tourism and Recreation Effects

Subtopic of Assessment	Onshore	Offshore	Combined Effects of the Project
Construction			
Impact on GVA, Employment and Supply Chain	Under the Scenario 1 ('Commitments' scenario), there is anticipated to be a **Minor** beneficial (not significant) GVA and employment effect in Scotland.		
Changes to Demographics	**Negligible** (not significant)	The significance of effects would range from **Negligible** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
Changes to Demand for Housing and Local Services	**Minor** adverse (not significant)	The significance of effects would range from **Negligible** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
Changes to amenity of local public and private receptors	**Minor** adverse (not significant)	*Not required for the offshore infrastructure.*	*N/A*
Changes to Tourism and Recreation Receptors	**Minor** adverse (not significant)	**Minor** adverse (not significant)	**Minor** adverse (not significant)
Socio-Cultural Impacts	**Minor** adverse (not significant)	The significance of effects would range from **Minor** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
O&M			
Impact on GVA, Employment and Supply Chain	Under the Scenario 1 ('Commitments' scenario), there is anticipated to be a **Major** beneficial (significant) GVA effect and a **Moderate** beneficial (significant) employment effect in the Regional Socio-Economics Study Area. In Scotland there is anticipated to be a **Moderate** beneficial (significant) GVA effect and a **Minor** beneficial (not significant) employment effect.		
Changes to Demographics	*Scoped out.*	The significance of effects would range from **Minor** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	

Subtopic of Assessment	Onshore	Offshore	Combined Effects of the Project
Changes to Demand for Housing and Local Services	*Scoped out.*	The significance of effects would range from **Minor** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
Changes to Tourism and Recreation Receptors	**Negligible** adverse (not significant)	**Minor** adverse (not significant)	**Minor** adverse (not significant)
Decommissioning			
Impact on GVA, Employment and Supply Chain	Under the Scenario 1 ('Commitments' scenario), there is anticipated to be a **Minor** beneficial (not significant) GVA and employment effect in Scotland.		
Changes to Demographics	**Negligible** (not significant)	The significance of effects would range from **Negligible** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
Changes to Demand for Housing and Local Services	**Minor** adverse (not significant)	The significance of effects would range from **Negligible** (not significant) to **Major** (significant) and could be beneficial or adverse, depending on the chosen port locations. Significant effects are more likely to arise at rural port locations.	
Changes to amenity of local public and private receptors	**Minor** adverse (not significant)	*Not required for the offshore infrastructure.*	*N/A*
Changes to Tourism and Recreation Receptors	**Minor** adverse (not significant)	**Minor** adverse (not significant)	**Minor** adverse (not significant)
Cumulative Effects Assessment			
Cumulative Effects Assessment	**Moderate** adverse (significant) effect on socio-cultural factors during construction phase. No other significant cumulative effects reported.	Once port location(s) are known, the Applicant will review the assessment. No significant cumulative effects reported for other subtopics.	**Moderate** adverse (significant) effect on socio-cultural factors for communities in proximity to Onshore Infrastructure during construction phase. Once port location(s) are known, the Applicant will review the assessment. No significant cumulative effects reported for other subtopics.

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A1 Tourism and Recreation Receptors

Table A.1: Tourism Receptors (Onshore and Offshore Assessments)

Receptor	Description	Location	Onshore	Offshore
Buchanness Lighthouse Holidays	Self-catering Accommodation	Bridge St, Boddam, Peterhead AB42 3NF		✓
Lighthouse Cottage	Self-catering Accommodation	Greyhope Cottage Girdleness, Greyhope Rd, Torry, Aberdeen AB11 8QX		✓
Northern Lights Apartments	Self-catering Accommodation	Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX		✓
Buchan Ness Lighthouse	Lighthouse	Peterhead AB42 3NF		✓
Slain's Castle	Castle	A975, Cruden Bay, Peterhead AB42 0NE		✓
Cruden Bay	Bay	Peterhead		✓
Collieston	Village	11 Whiteness Cottages, Hightown, Collieston, Ellon AB41 8RS		✓
Seal Beach	Beach	Newburgh, Ellon AB41 6BY		✓
Balmedie Beach	Beach	Aberdeen, AB23 8WU		✓
Aberdeen/Orkney Ferry Link	Ferry Link	N/A		✓
Royal Aberdeen Golf Course	Golf Course	Links Rd, Bridge of Don, Aberdeen AB23 8AT		✓
Aberdeen Esplanade/Beach	Historical Landmark	Aberdeen AB24 5RZ		✓
Torry Battery	Historical Landmark	Greyhope Rd, Torry, Aberdeen AB11 8QX		✓
Baron's Cairn	Nature Reserve	Torry, Aberdeen AB12 3HX		✓
Girdle Ness Lighthouse	Lighthouse	1-5 Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX		✓
Stonehaven Harbour and Pier	Harbour	Old Pier, Stonehaven AB39 2JU		✓
Stonehaven War Memorial	War Memorial	1, Stonehaven AB39 2TJ		✓
Dunnottar Castle	Ruined Fortress	Stonehaven, AB39 2TL	✓	✓
Dunnottar Woods	Recreational Area	Stonehaven, AB39 3UJ	✓	
Dunnottar Cliffs	Scenic Viewpoint	Aberdeenshire, AB39 2TL	✓	
Todhead Lighthouse	Lighthouse	Montrose, DD10 0TH	✓	

Receptor	Description	Location	Onshore	Offshore
Montrose Cove and Beach	Scenic Viewpoint	Montrose DD10 0HU	✓	
RSPB Fowlsheugh Nature Reserve	Nature Reserve	Crawton, Stonehaven, AB39 2TP	✓	
Grassic Gibbon Centre	Small museum and café	Arbuthnott, Laurencekirk AB30 1PB	✓	
Mill of Benholm*	Historical Landmark located close to the site	Benholm DD10 0HT	✓	
Glenbervie House*	House and Country Estate	Drumlithie, Stonehaven AB39 3YA	✓	
Castelton Farm Café	Farm Shop and Café	Castleton Farm Cottage, Fordoun, Laurencekirk AB30 1JX	✓	
Arbuthnott Estate	Public access gardens open between March and August.	Arbuthnott, Laurencekirk AB30 1PA	✓	
Benholm and Johnshaven Heritage Museum	Heritage Museum	Fore St, Johnshaven, Montrose DD10 0EU	✓	
Montrose Museum	Museum	Panmure Pl, Montrose DD10 8HF	✓	
Montrose Air Station Museum	Heritage Museum	Broomfield Rd, Montrose DD10 8SY	✓	
Scottish Wildlife Trust, Montrose Basin Visitor Centre and Wildlife Reserve	Tidal basin with nature sanctuary and visitor centre	Rossie Braes, A92, Montrose DD10 9TA	✓	
Bervie Bunker⁺	Cold War Radar Station Bunker	Inverbervie	✓	

* Description/location of receptors have been updated following consultation feedback from Aberdeenshire Council on the Bowdun OWF Onshore EIA Report.
⁺Identified in feedback from Aberdeenshire Council on Bowdun OWF Onshore EIA Report but not included in the assessment as is a private home with no visitor access.

Table A.2: Recreation Receptors (Onshore and Offshore Assessments)

Receptor	Description	Location	Onshore	Offshore
Coastal Path Boddam to Cruden Bay	Coastal Path	A975, Cruden Bay, Peterhead AB42 0NE		✓
Coastal Path Whinnyfold North Section	Coastal Path	Whinnyfold		✓
Coastal Path Collieston Village	Coastal Path	Collieston		✓
Coastal Path Newburgh Aberdeen City Boundary	Coastal Path	Newburgh, Ellon AB41 6BY Aberdeen, AB23 8WU		✓
Murcar Beach Path	Coastal Path	Bridge of Don, Aberdeen AB23 8DS		✓
Coastal Path Muchalls Village - Road Link	Coastal Path	Muchalls		✓
Coastal Path Gourdon to Inverbervie	Coastal Path	Inverbervie		✓
Fetteresso Forest Recreational Area	Commercial Woodland	Within PPP Application Boundary for onshore infrastructure	✓	
Core Paths (1, 3, 7, 11, 12)	Rights of way footpaths, cycle tracks, paths which are, or may be covered by path agreements	Various within PPP Application Boundary for onshore infrastructure	✓	
Local Paths (4, 5, 8, 10, 13, 14, 15, 16, 17, 18, 19, 20, 21)	Local paths that do not hold a statutory designation	Various within PPP Application Boundary for onshore infrastructure	✓	
National and Recreational Cycle Routes (2, 6, 9)	Nationally designated cycle routes and recreational cycle routes	Various within PPP Application Boundary for onshore infrastructure	✓	

Table A.3: Community and Non-Agricultural Commercial Receptors (Onshore Assessment Only)

Receptor	Description	Location
Community		
Drumlithie Public Hall	Village Hall	Station Road, Drumlithie, Stonehaven, AB39 3UH
Drumlithie Post Office	Post Office	Burnside Croft, Station Rd, Stonehaven AB39 3YT
Drumlithie Park	Public Park	School Road, Drumlithie, Aberdeenshire, AB39 3YF
St John's Baptist Church	Place of Worship	High Street, Drumlithie, Stonehaven, AB39 3YZ
Arbuthnott Parish Church	Place of Worship	Arbuthnott, Laurencekirk, AB30 1NA
Glenbervie School	Primary School	Drumlithie, Stonehaven, AB39 3YS
Drumlithie Bowling Club	Sports Facility	Station Road, Drumlithie, Stonehaven, AB39 3YT
Commercial		
The Steeple Shop	Convenience Store	Glenbervie Rd, Drumlithie, Stonehaven AB39 3YT
Smiddy Holiday Cottage	Airbnb/Holiday Home	Rickarton, Stonehaven, AB39 3TH
Anniston Farm Self Catering Cottages	3 Airbnb/Holiday Homes	Inverbervie, Montrose DD10 0PP
Arbuthnott Estate Cottages	4 Airbnb/Holiday Homes	Laurencekirk, AB30 1LX
Clerkswell Cottage	Airbnb/Holiday Home	Tannachie, Stonehaven, AB39 3UX
Downswell Cottage	Airbnb/Holiday Home	Tannachie, Stonehaven, AB39 3UX
Bloomfield Steading	Airbnb/Holiday Home	Arbuthnott, Laurencekirk, AB30 1LR

A2 Receptor Sensitivity

Table A.4: Receptor Sensitivity and Justification

Receptor	Sensitivity	Justification
Economy		
UK	Low	At a UK level, in February the Bank of England forecast UK GDP growth to slow from 1.4% in 2025 to 0.9% in 2026 before strengthening to 1.5% in 2027 and 1.9% in 2028. Subdued growth in 2026 reflects the persistence of weak demand, uncertainty and a slight drag from past monetary tightening (Scottish Government, 2026). This growth is expected to be led by regions such as London and the East of England, which benefit from a high concentration of high-growth sectors including information and communication, professional services, and financial activities (EY UK, 2025). Areas outside the South-east, particularly in the North of England, Wales and Northern Ireland, experience below-average GVA growth, reflecting structural imbalances in sectoral composition and productivity (Nguyen, 2019). However, the scale, adaptability and capacity of the UK economy, combined with ongoing policy interventions that aim to increase growth, develop skills (Institute for Government, 2022) and encourage sectoral investment (UK Government, 2024), reduce its vulnerability. The UK's GVA is assigned a Low sensitivity rating due to its diversified sectoral strengths and overall resilience.
Scotland	Medium	Following expected growth of 1.1% in 2025 the SFC forecast Scottish GDP growth to strengthen to 1.3% in both 2026 and 2027. Overall, stable growth prospects for 2026–27 and easing inflation support a cautiously positive economic outlook, though labour-market softening, weak demand, cost pressures, and rising geopolitical and trade uncertainties continue to pose notable risks (Scottish Government, 2026). Scotland's economic structure is a key factor in its sensitivity. Overall, Scotland's long-standing challenges include business growth, skills gaps, and regional productivity disparities, with rural areas facing greater economic fragility and slower recovery rates (Williams *et al.*, 2025). Despite these challenges, Scotland's economy benefits from its overall size, policy prioritisation, and institutional resilience, which mitigate its exposure to short-term shocks. The Scottish Government's National Strategy for Economic Transformation and regional development frameworks aim to address structural weaknesses and promote inclusive growth (Scottish Government, 2022). Scotland's GVA is assigned a Medium sensitivity rating, reflecting sectoral underperformance and regional disparities.
Regional Socio-Economic Study Area	High	The Regional Socio-Economic Study Area has long been closely tied to the UK's oil and gas economy. The North Sea industry became a major economic force for the region beginning in the 1970s, driving population growth, employment, and higher earnings across Aberdeen and Aberdeenshire. Research shows that the arrival and peak

Receptor	Sensitivity	Justification
		of oil and gas activity significantly shaped the area's development, embedding the sector as a core driver of local economic performance (Just Transition Lab, 2023). As the global energy system transitions away from fossil fuels, the region faces a period of economic restructuring marked by contraction within O&G and the gradual emergence of more diversified industries. Across the Regional Socio-Economic Study Area, local strategies consistently emphasise the need for innovation, diversification, and investment in emerging sectors such as renewable energy, life sciences, advanced manufacturing, and tourism. While the region benefits from substantial infrastructure and an experienced workforce, the pace of transition presents challenges for long-term economic resilience, particularly in communities with employment concentrations tied to the oil and gas supply chain (Aberdeen and Grampian Chamber of Commerce, 2024). Given these structural pressures and the region's exposure to global market volatility, the overall sensitivity of the economy within the Regional Socio-Economic Study Area is assessed as High.
Labour Market		
UK	Medium	Across the UK, employment growth is forecast to average 1.1% annually from 2024 to 2027 (EY UK, 2025), supported by strong performance in regions with high-growth industries such as finance, technology, and professional services. While the national labour market is resilient, with active workforce development policies (e.g. Skills Bootcamps (Department for Education, 2025), employment rates vary significantly across UK regions (Office for National Statistics, 2025). Unemployment is expected to rise to 5.25% over 2026 (Scottish Government, 2026). Therefore, the receptor sensitivity is Medium.
Scotland	Medium	Scotland's labour market has shown headline resilience, with low unemployment and growth in real earnings in 2025 (Scottish Government, 2026). However, underlying indicators point to moderate vulnerability. Employment growth is forecast at 0.8% annually from 2024–2027, below the UK average of 1.1%. Structural challenges include a 32% year-on-year decline in job adverts, underrepresentation in high-growth sectors, (Scottish Government, 2025) (EY UK, 2025). Unemployment in Scotland remained low at 3.7% in late 2025, but signs of labour-market loosening are emerging, with fewer payrolled employees, slower pay growth, and business surveys reporting falling staffing levels, even as the unemployment rate dipped slightly over the year (Scottish Government, 2026). While Scotland's overall labour market has shown resilience, regional disparities persist, particularly in areas with lower productivity and sectoral concentration, making them more vulnerable to economic shocks (Fraser of Allander Institute & Scottish Centre for Employment Research, 2017). Overall, employment in the Scottish labour market is assigned a Medium sensitivity.

Receptor	Sensitivity	Justification
Regional Socio-Economic Study Area	High	The labour market across the Regional Socio-Economic Study Area is undergoing a significant period of transition, driven primarily by the long-term decline in O&G activity and the region's strategic shift toward low-carbon and sustainable industries. Historically, the area has benefited from high employment rates and a skilled workforce closely aligned with the needs of the energy sector. However, regional policy documents highlight growing challenges related to workforce availability, linked to the impacts of the UK's exit from the EU, demographic change, and the ageing profile of the labour force (Invest Aberdeen, n.d.). Although some parts of the study area have been less directly dependent on O&G, the wider regional labour market is still affected by structural changes, including the decline of traditional industries and the variable pace of economic diversification. The Regional Skills Assessment (2024) indicates that overall employment growth across the wider area is expected to remain below the national average, with contraction in energy and associated services affecting job stability, opportunities, and workforce transitions (Skills Development Scotland, 2024). In line with the sensitivity criteria, and given the combined pressures of sectoral restructuring, demographic shifts, and uneven employment opportunities, the labour market within the Regional Socio-Economic Study Area is assigned a High sensitivity rating.
Demographics (onshore)		
Aberdeenshire, Aberdeen City, Mearns, Stonehaven and Lower Deeside	Medium	The proportion of the population that are of working age for Aberdeenshire (60.5%), Mearns (60.6%), and Stonehaven and Lower Deeside (60.3%) is largely aligned with that of Scotland (60.6%). However, there is a lower population density and a greater proportion of people over aged 65 (21% in Aberdeenshire versus 19.5% in Scotland) and a lower proportion of people under age 16 in Aberdeenshire (18.5%) and Stonehaven and Lower Deeside (17.2%), compared to that of Scotland (19.9%). Aberdeen City has a high population density and a predominantly working-age population, with 67.2% of its residents falling within this age group.
Demographics (offshore)		
Rural / urban port location	Low to High	The most sensitive communities are small rural towns with ageing populations, constrained housing, limited labour-market flexibility, and ongoing economic transition. Conversely, urban settlements are less sensitive because larger and more demographically diverse populations, broader economic structures, and stronger transport networks provide greater capacity to accommodate short-term demographic shifts. The sensitivity of coastal communities to demographic effects will depend on each chosen port location: urban communities will tend towards a lower sensitivity, while rural will have a higher sensitivity.
Demand for housing and local services (onshore)		

Receptor	Sensitivity	Justification
Accommodation stock in Aberdeen-shire, Aberdeen City, Mearns, Stonehaven and Lower Deeside	Low	There is lower than average rental prices, high vacancy rates and ample availability of temporary tourist accommodation in Aberdeen City, Aberdeenshire and Mearns, Stonehaven and Deeside.
Local services in Aberdeen-shire, Aberdeen City, Mearns, Stonehaven and Lower Deeside	High	There are capacity issues and increasing demand for secondary education and ambulance services in Aberdeenshire and Kincardine and Mearns.
Demand for housing and local services (offshore)		
Rural / urban port location	Low to High	Data gathered in the baseline for the local authorities in the Regional Socio-Economics Study Area suggests that the housing and tourism accommodation market and local services have sufficient capacity to absorb a slight to substantial increase in demand. The specifics of the housing market and capacity of local services will vary depending on whether the port(s) is located in an urban or rural area within these local authorities. However, it is considered that urban communities are likely to have low to medium sensitivity, while rural communities are likely to have high sensitivity.
Amenity of local public and private receptors (onshore only)		
Public and private receptors	High	In acknowledgment of the importance of the surrounding environment for the private receptors (holiday homes) and frequent users of the public receptors (elderly people and children), the sensitivity of public and private receptors discussed above are assigned as High.
Tourism and Recreation		
Aberdeen-shire and Aberdeen City tourism economy	Low	Tourism is a significant contributor to the Aberdeenshire and Aberdeen City economies, employing 11,800 full time equivalent jobs in 2024 (Aberdeen City Council, 2024). The regional tourism economy is resilient, with tourism in the region on an upward trajectory. The economic impact of tourism across Aberdeen City and Aberdeenshire increased by 2% between 2023 and 2024 and in 2024, the region attracted 3.7 million overnight visitors, a 16.9% increase from 2023 (Opportunity North East, 2025). Based on the current state of the tourism economy, it is considered to be robust and resilient to change.
Socio-cultural impacts (onshore)		
Mearns, Stonehaven and Lower Deeside	High	Quality of life when measured by the WELLBY method across Aberdeenshire and Aberdeen City[7] combined is greater than Scotland as a whole. Data gathered in relation to Mearns and Stonehaven and Deeside indicates that generally, this area experiences low levels of socio-economic deprivation and has much higher average

[7] Data only available at local authority level.

Receptor	Sensitivity	Justification
		incomes than the Scotland average. However, Stonehaven and Lower Deeside has a higher proportion of people aged 65+ and over than the Scottish average. It is also acknowledged that local communities have concerns highlighted relating to other development proposals in the area.
Socio-cultural impacts (offshore)		
Rural / urban port location	Low to High	Coastal communities in the Regional Socio-Economics Study Area are facing increased socio-cultural pressures, linked to long-term economic change, especially the decline of the oil and gas sector, as well as growing risks from coastal erosion and flooding. Harbours, beaches, coastal paths, and marine infrastructure are central to local identity, employment, everyday life, and community wellbeing. In several communities, these pressures have contributed to out-migration, challenges in the local labour market, and increasing strain on coastal infrastructure. It is anticipated that rural coastal communities would be of high sensitivity and urban coastal communities would be of low to medium sensitivity.

A3 GVA and Employment Assessment Outputs

GVA and Employment Impact Tables

Table A.5: Baseline Conditions

	Receptor	Regional Socio-Economics Study Area	Scottish Economy	UK Economy
Baseline	GVA	£20.9bn	£183.5bn	£2,601.6bn
Baseline	Employment	108,875 FTEs	1.02mln FTEs	14.67mln FTEs

Construction

Table A.6: Scenario 1 (Commitments Scenario) Construction Outputs

	Scotland	UK
Direct GVA	£214 mln	£450 mln
Indirect GVA	£113 mln	£340 mln
Induced GVA	£69 mln	£202 mln
Total GVA	**£396** mln	**£992** mln
Direct annual. Employment	2,899 aFTE	6,201 aFTE
Indirect annual. Employment	1,474 aFTE	5,551 aFTE
Induced annual. Employment	748 aFTE	2,874 aFTE
Total Annualised Employment	**5,121** aFTE	**14,626** aFTE
Direct Employment	725 FTE	1,550 FTE
Indirect Employment	368 FTE	1,388 FTE
Induced Employment	187 FTE	718 FTE
Total Employment	**1,280** FTE	**3,656** FTE

A3.1.1 Scenario 1 (Commitments Scenario) CAPEX project expenditure would be expected to result in a total GVA impact of:

- £396 million in Scotland, a 0.22% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Low magnitude of change.
- £992 million in the UK, a 0.04% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.2 Scenario 1 (Commitments Scenario) CAPEX project expenditure would be expected to result in a total Employment impact of:

- 15,121 aFTEs in Scotland, equivalent to 1,280 FTEs, a 0.13% increase on the baseline total of 1.02 million FTEs in Scotland, considered a Low magnitude of change.
- 14,626 aFTEs in the UK, equivalent to 3,656 FTEs, a 0.02% increase on the baseline total of 14.67 million FTEs in the UK, considered a negligible magnitude of change.

Table 0.7: Scenario 2 (Ambitions Scenario) Construction Outputs

	Scotland	UK
Direct GVA	£585 mln	£963 mln
Indirect GVA	£278 mln	£624 mln
Induced GVA	£196 mln	£410 mln
Total GVA	**£1,059 mln**	**£1,998 mln**
Direct annual. Employment	7,454 aFTEs	12,827 aFTEs
Indirect annual. Employment	3,591 aFTEs	10,132 aFTEs
Induced annual. Employment	2,215 aFTEs	5,751 aFTEs
Total Annualised Employment	**13,261 aFTEs**	**28,710 aFTEs**
Direct Employment	1,864 FTEs	3,207 FTEs
Indirect Employment	898 FTEs	2,533 FTEs
Induced Employment	554 FTEs	1,438 FTEs
Total Employment	**3,315 FTEs**	**7,177 FTEs**

A3.1.3 Scenario 2 (Ambitions Scenario) CAPEX project expenditure would be expected to result in a total GVA impact of:

- £1,059 million in Scotland, a 0.58% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Medium magnitude of change.
- £1,998 million in the UK, a 0.08% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.4 Scenario 2 (Ambitions Scenario) CAPEX project expenditure would be expected to result in a total Employment impact of:

- 13,261 aFTEs in Scotland, equivalent to 3,315 FTEs, a 0.33% increase on the baseline total of 1.02mln FTEs in Scotland, considered a Low magnitude of change.
- 28,710 aFTEs in the UK, equivalent to 7,177 FTEs, a 0.05% increase on the baseline total of 14.67mln FTEs in the UK, considered a negligible magnitude of change.

O&M

Table A.8: Scenario 1 (Commitments Scenario) Operation Outputs

Operation Scenario 1			
	Regional Socio-Economics Study Area	**Scotland**	**UK**
Direct GVA	£318 mln	£909 mln	£909 mln
Indirect GVA	£116 mln	£332 mln	£332 mln
Induced GVA	£88 mln	£251 mln	£251 mln
Total GVA	**£522 mln**	**£1,493 mln**	**£1,493 mln**
Direct annual. Employment	3,257 aFTEs	9,305 aFTEs	,305 aFTEs

Indirect annual. Employment	1,818 aFTEs	5,194 aFTEs	5,194 aFTEs
Induced annual. Employment	1,204 aFTEs	3,441 aFTEs	3,441 aFTEs
Total Annualised Employment	**6,279 aFTEs**	**17,940 aFTEs**	**17,940 aFTEs**
Direct Employment	109 FTEs	310 FTEs	310 FTEs
Indirect Employment	61 FTEs	173 FTEs	173 FTEs
Induced Employment	40 FTEs	115 FTEs	115 FTEs
Total Employment	**209 FTEs**	**598 FTEs**	**598 FTEs**

A3.1.5

A3.1.6 Scenario 1 (Commitments Scenario) OPEX project expenditure would be expected to result in a total GVA impact of:

- £522 million in the Regional Socio-Economics Study Area, a 2.51% increase on the baseline total of £20.9 billion GVA in the Regional Socio-Economics Study Area, considered a high magnitude of change.
- £1,493 million in Scotland, a 0.82% increase on the baseline total of £183.5 billion GVA in Scotland, considered a medium magnitude of change.
- £1,493 million in the UK, a 0.06% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.7 Scenario 1 (Commitments Scenario) OPEX project expenditure would be expected to result in a total Employment impact of:

- 6,279 aFTEs, equivalent to 209 FTEs, in the Regional Socio-Economics Study Area, a 0.19% increase on the baseline total of 108,875 FTEs in the Regional Socio-Economics Study Area, considered a low magnitude of change.
- 17,940 aFTEs in Scotland, equivalent to 598 FTEs, a 0.06% increase on the baseline total of 1.02mln FTEs in Scotland, considered a negligible magnitude of change.
- 17,940 aFTEs in the UK, equivalent to 598 FTEs, a 0.00% increase on the baseline total of 14.67mln FTEs in the UK, considered a negligible magnitude of change.

Table 0.9: Scenario 2 (Ambitions Scenario) Operation Outputs

Operation Scenario 2 (Ambitions Scenario)			
	Regional Socio-Economics Study Area	**Scotland**	**UK**
Direct GVA	£455 mln	£909 mln	£911 mln
Indirect GVA	£166 mln	£332 mln	£332 mln
Induced GVA	£126 mln	£251 mln	£251 mln
Total GVA	**£746 mln**	**£1,493 mln**	**£1,493 mln**
Direct annual. Employment	4,652 aFTEs	9,305 aFTEs	9,305 aFTEs

Indirect annual. Employment	2,597 aFTEs	5,194 aFTEs	5,194 aFTEs
Induced annual. Employment	1,721 aFTEs	3,441 aFTEs	3,441 aFTEs
Total Annualised Employment	**8,970 aFTEs**	**17,940 aFTEs**	**17,940 aFTEs**
Direct Employment	155 FTEs	310 FTEs	310 FTEs
Indirect Employment	87 FTEs	173 FTEs	173 FTEs
Induced Employment	57 FTEs	115 FTEs	115 FTEs
Total Employment	**299 FTEs**	**598 FTEs**	**598 FTEs**

A3.1.8 Scenario 2 (Ambitions Scenario OPEX project expenditure would be expected to result in a total GVA impact of:

- £746 million in the Regional Socio-Economics Study Area, a 3.58% increase on the baseline total of £20.9 billion GVA in the Regional Socio-Economics Study Area, considered a high magnitude of change.
- £1,493 million in Scotland, a 0.81% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Medium magnitude of change.
- £1,493 million in the UK, a 0.06% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.9 Scenario 2 (Ambitions Scenario) OPEX project expenditure would be expected to result in a total Employment impact of:

- 8,970 aFTEs, equivalent to 299 FTEs, in the Regional Socio-Economics Study Area, a 0.27% increase on the baseline total of 108,875 FTEs in the Regional Socio-Economics Study Area, considered a low magnitude of change.
- 17,940 aFTEs in Scotland, equivalent to 598 FTEs, a 0.05% increase on the baseline total of 1.02 million FTEs in Scotland, considered a negligible magnitude of change.
- 17,940 aFTEs in the UK, equivalent to 598 FTEs, a 0.00% increase on the baseline total of 14.67 million FTEs in the UK, considered a negligible magnitude of change.

Decommissioning

Table A.10: Scenario 1 (Commitments Scenario) Decommissioning Outputs

	Scotland	**UK**
Direct GVA	£27 mln	£55 mln
Indirect GVA	£12 mln	£37 mln
Induced GVA	£7 mln	£22 mln
Total GVA	**£46 mln**	**£114 mln**
Direct annual. Employment	204 aFTEs	663 aFTEs
Indirect annual. Employment	132 aFTEs	656 aFTEs
Induced annual. Employment	81 aFTEs	338 aFTEs

Total Annualised Employment	**417 aFTEs**	**1,657 aFTEs**
Direct Employment	102 FTEs	332 FTEs
Indirect Employment	66 FTEs	328 FTEs
Induced Employment	40 FTEs	169 FTEs
Total Employment	**208 FTEs**	**829 FTEs**

A3.1.10 Scenario 1 (Commitments Scenario) DECEX project expenditure would be expected to result in a total GVA impact of:

- £46 million in Scotland, a 0.03% increase on the baseline total of £183.5 billion GVA in Scotland, considered a negligible magnitude of change.
- £114 million in the UK, a 0.00% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.11 Scenario 1 (Commitments Scenario) DECEX project expenditure would be expected to result in a total Employment impact of:

- 417 aFTEs in Scotland, equivalent to 208 FTEs, a 0.02% increase on the baseline total of 1.02 million FTEs in Scotland, considered a negligible magnitude of change.
- 1,657 aFTEs in the UK, equivalent to 829 FTEs, a 0.01% increase on the baseline total of 14.67 million FTEs in the UK, considered a negligible magnitude of change.

Table 0.11: Scenario 2 (Ambitions Scenario) Decommissioning Outputs

	Scotland	**UK**
Direct GVA	£72 mln	£116 mln
Indirect GVA	£32 mln	£72 mln
Induced GVA	£20 mln	£43 mln
Total GVA	**£124 mln**	**£231 mln**
Direct annual. Employment	547 aFTEs	1,272 aFTEs
Indirect annual. Employment	354 aFTEs	1,181 aFTEs
Induced annual. Employment	216 aFTEs	623 aFTEs
Total Annualised Employment	**1,117 aFTEs**	**3,076 aFTEs**
Direct Employment	273 FTEs	636 FTEs
Indirect Employment	177 FTEs	590 FTEs
Induced Employment	108 FTEs	311 FTEs
Total Annualised Employment	**559 FTEs**	**1,538 FTEs**

A3.1.12 Scenario 2 (Ambitions Scenario) DECEX project expenditure would be expected to result in a total GVA impact of:

- £124 million in Scotland, a 0.07% increase on the baseline total of £183.5 billion GVA in Scotland, considered a negligible magnitude of change.

- £231 million in the UK, a 0.01% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a negligible magnitude of change.

A3.1.13 Scenario 2 (Ambitions Scenario) DECEX project expenditure would be expected to result in a total Employment impact of:

- 1,117 aFTEs in Scotland, equivalent to 559 FTEs, a 0.05% increase on the baseline total of 1.02 million FTEs in Scotland, considered a negligible magnitude of change.
- 3,076 aFTEs in the UK, equivalent to 1,538 FTEs, a 0.01% increase on the baseline total of 14.67 million FTEs in the UK, considered a negligible magnitude of change.

A4 Figures

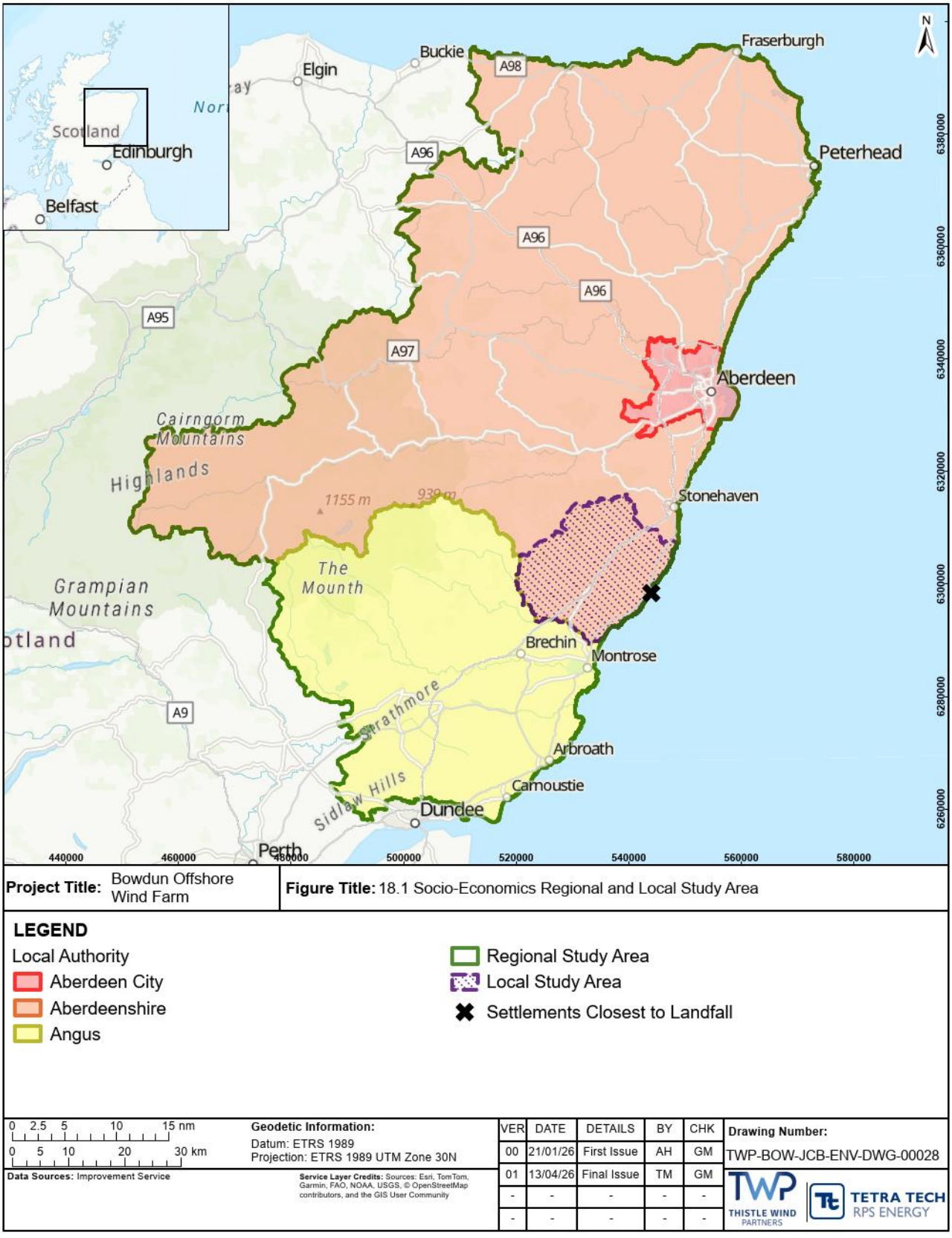

Figure A.1 Socio-Economics Regional and Local Study Area

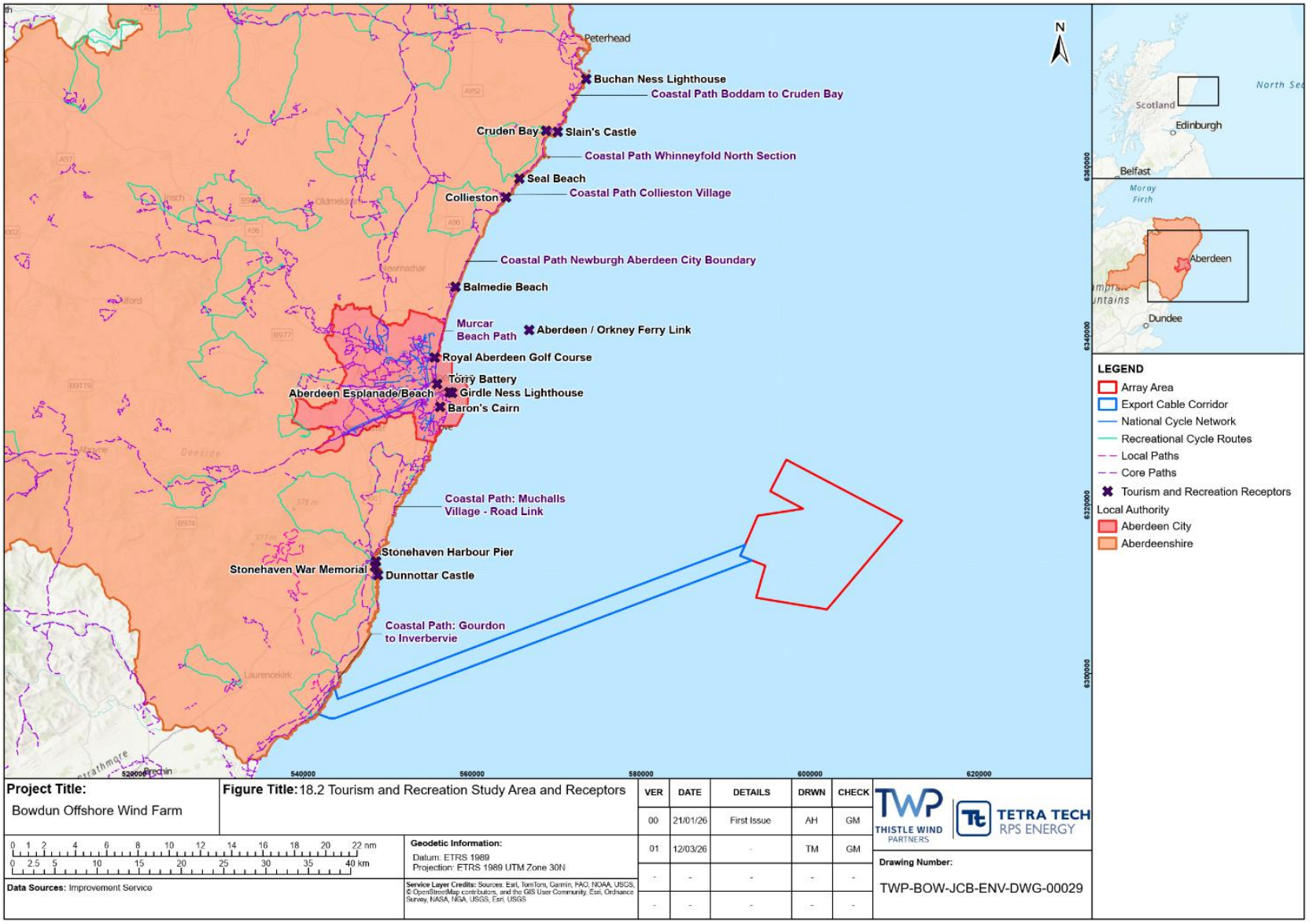

Figure A.2 Tourism and Recreation Study Area and Receptors (offshore)

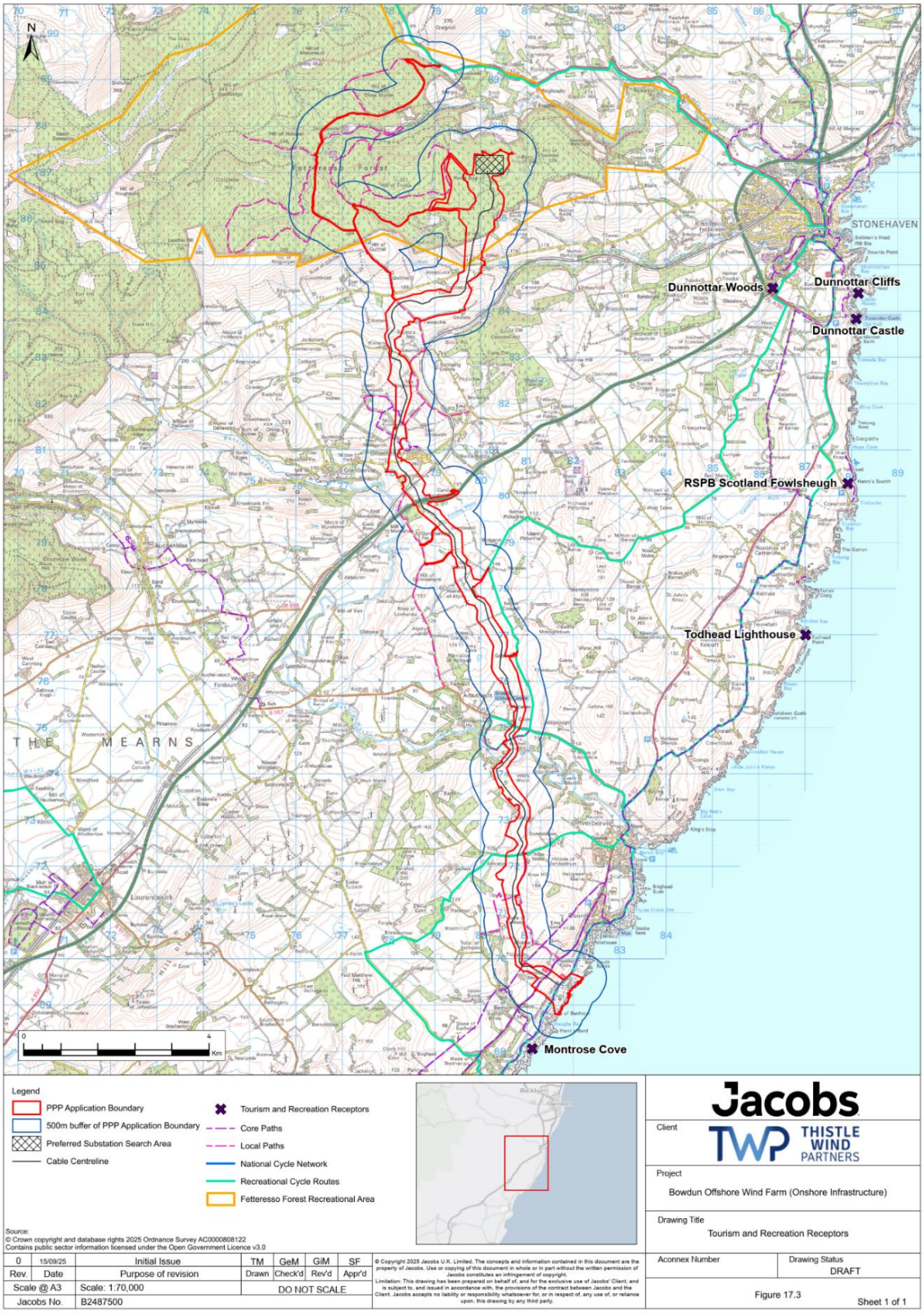

Figure A.3 Tourism and Recreation Receptors (onshore)

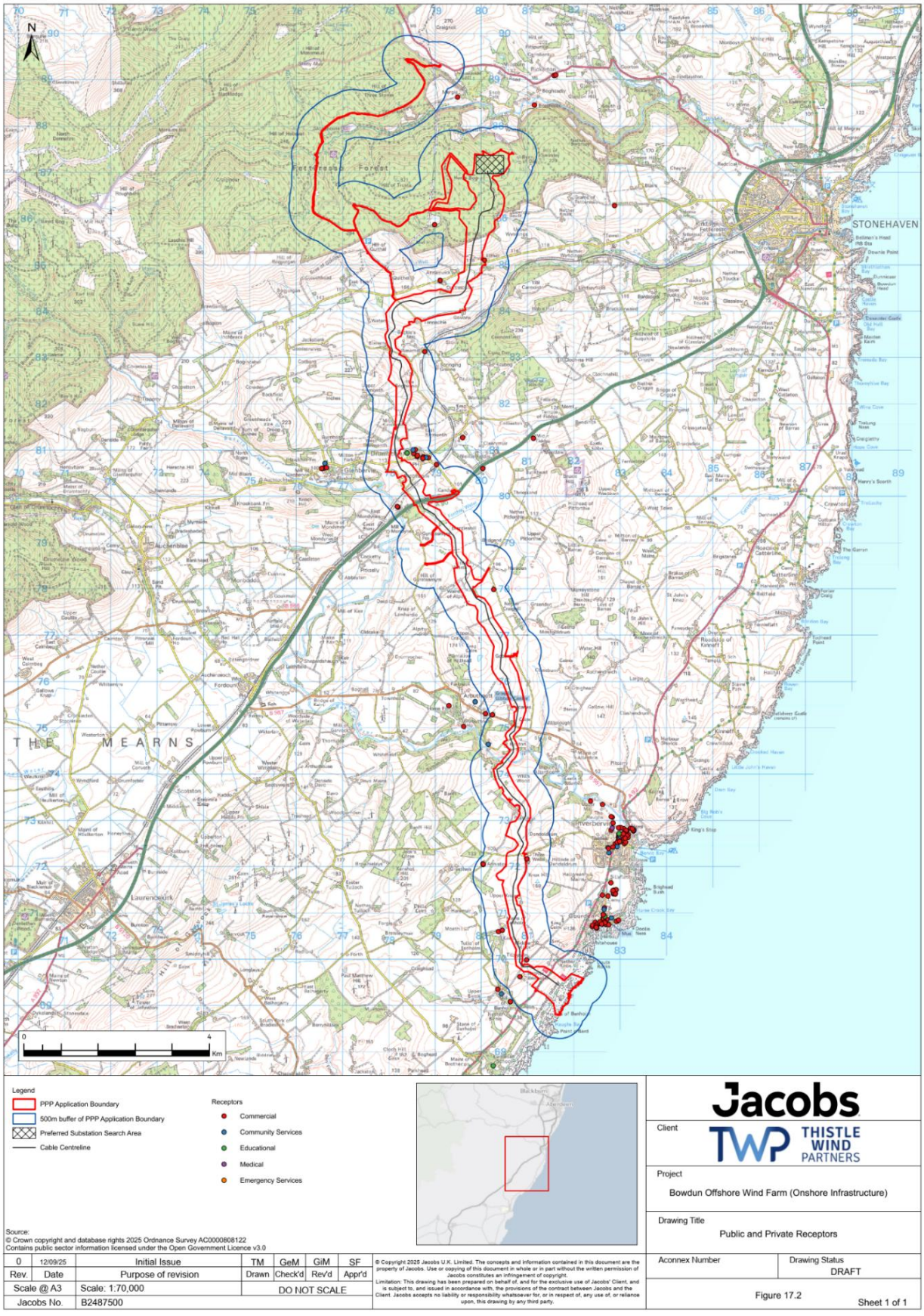

Figure A.3 Public and Private Receptors (onshore)

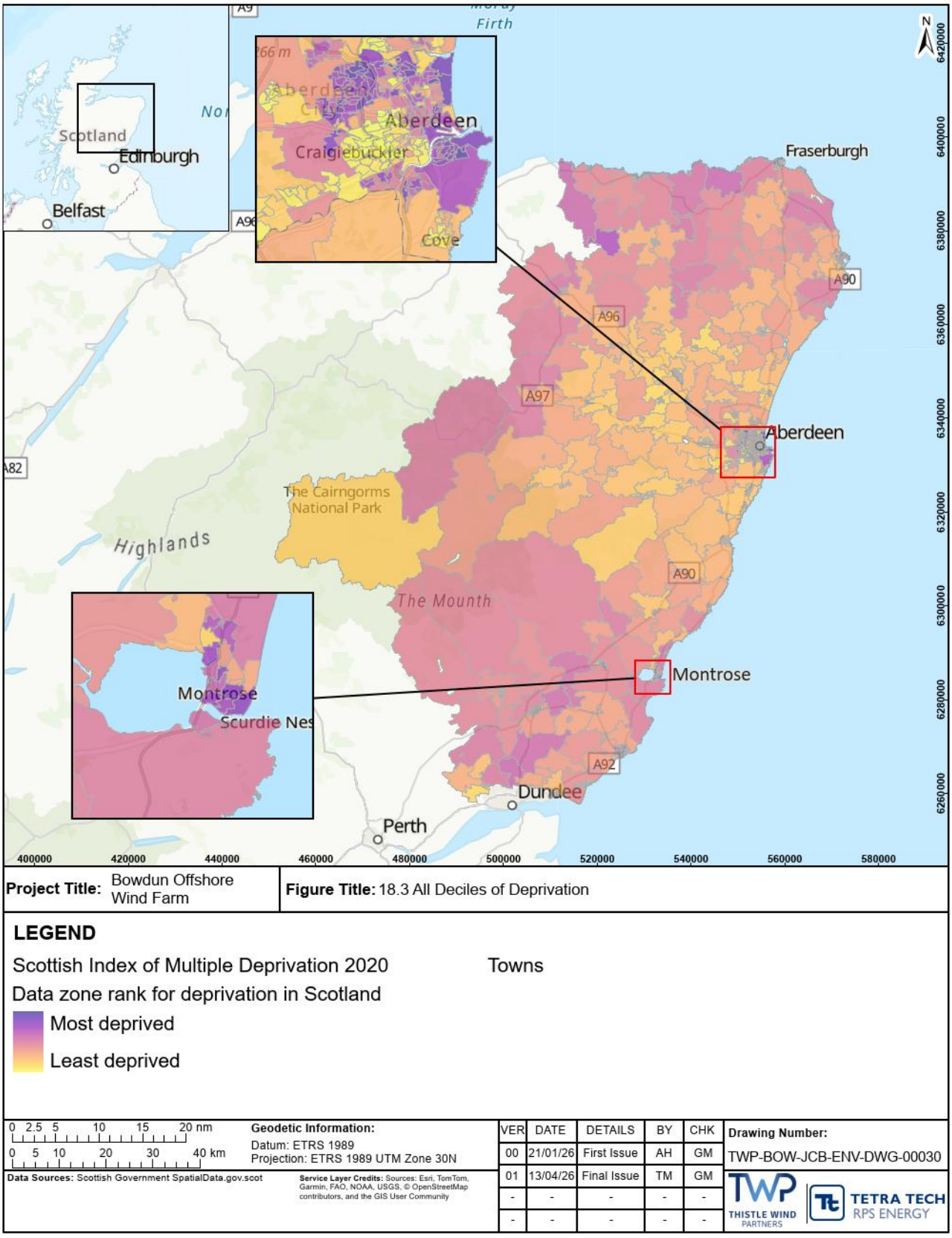

Figure A.4 All Deciles of Deprivation 2020 (onshore and offshore)