Bowdun Offshore Wind Farm, Onshore EIA Report

Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation

TWP-BOW-JCB-ONE-RPT-00028 | November 2025

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16.1 Introduction

16.1.1 This section of the Onshore Environmental Impact Assessment (EIA) report identifies the Socio-Economics, Tourism and Recreation receptors of relevance to the Proposed Development and considers potential impacts arising from the construction, operation and maintenance (O&M), and decommissioning phases.

16.1.2 The assessment presented is informed by the following technical chapters:

- Volume 1, Chapter 6: Land Use, Agriculture and Public Access;
- Volume 1, Chapter 8: Landscape and Visual;
- Volume 1, Chapter 12: Air Quality;
- Volume 1, Chapter 13: Noise and Vibration; and
- Volume 1 Chapter 14: Traffic and Transport.

16.1.3 In this chapter, the methodology, baseline and key parameters for the assessment are set out, and the analysis of potential impacts will build on the Scoping Report.

16.1.4 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.
- Changes to tourism and recreation receptors.
- Socio-cultural impacts.

16.2 Socio-economics, Tourism and Recreation Study Area

16.2.1 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, Durning, Olorundami, & Welch, 2020).

16.2.2 The Scottish Government guidance (Scottish Government, 2022a) identifies six principles for identifying study areas for offshore renewables and other marine developments. The principles consider the main locations where socio-economic impacts will occur and have been applied to the Proposed Development. These principles, and how they have been considered in identifying the study areas for the assessment, are as follows:

- Principle 1 (Dual Geographies) – The impact area for the Supply Chain and Investment Impacts should be separate from the impact area(s) for Wider Socio-Economic Impacts.[1]

[1] The Supply Chain and Investment Impacts cover those associated with the developer spending money and include impacts that can be quantified, whereas the Wider Socio-Economic Impacts includes other impacts that are more likely to be qualitative in nature, closer to the epicentres of impact. These can be related to perceptions as well as observable actions. (Scottish Government, 2022a)

    - The study area for the GVA and employment sub-topic (Supply Chain and Investment Impacts) is separate to the study areas for the other sub-topics (Wider Socio-Economic Impacts). These areas are defined in Table 16.1.

- Principle 2 (Appropriate Impacts) – The appropriate impacts for assessments should be identified prior to defining the local areas. When establishing geographies, these impacts must be taken into account to ensure the assessment remains consistent, comparable, and practical.
    - Appropriate impacts were identified as part of the scoping exercise and the local areas have been defined with cognisance of the likely significant effects for each sub-topic.
- Principle 3 (Epicentres) – The study areas should include all the epicentres of the appropriate impacts (including both the Supply Chain and Investment Impacts and the Wider Socio-Economic Impacts).
    - Epicentres for impacts on GVA and employment (Supply Chain and Investment impacts) have been linked to the location of suppliers and the potential locations of the O&M port and Construction & Marshalling (C&M) port. Accordingly, the North East region has been included as an impact epicentre and assessed separately. For the other sub-topics (Wider Socio-Economic Impacts), consideration has been given to the location of the onshore infrastructure - substation, transmission cables, and associated infrastructure - in determining impact epicentres.
- Principle 4 (Accountability) – The impact areas used in the assessment should comprise of pre-existing economic or political geographies (community councils, local authorities, development agencies) to enhance accountability and enable a reliable baseline to be described.
    - Baseline data has been collected from appropriate pre-existing economic and administrative areas and study areas have been defined accordingly, as per Table 16.1.
- Principle 5 (Understandable) – The impact areas should be defined in such a way that is clear and easily understood by the communities they describe.
    - The local area is defined in terms of Electoral Ward 2022 administrative areas and the committee area. Specific settlements and receptors within the local area are described where relevant.
- Principle 6 (Connected Geography) – The impact area for the Supply Chain and Investment Impacts should consist of connected (including coastal) pre-existing economic or political geographies.
    - The study area for GVA and employment (Supply Chain and Investment Impacts) is cognisant of the inter-connected nature of the supply chain in the region, and accordingly includes consideration of the North East of Scotland as a distinct economic receptor.

16.2.3 With cognisance of these principles, the various topics included in this assessment are considered separately according to their individual attributes.

16.2.4 The assessment of amenity in relation to changes to public and private services, and recreational receptors utilises the Study Areas defined in the relevant EIA topic chapters (Noise and Vibration, Land Use, Agriculture and Public Access, Landscape and Visual, and Traffic and Transport). These Study Areas are described in more detail in Table 16.1 and are illustrated on Figure 16.1 and Figure 16.2 (Annex – Figures).

16.2.5 The terminology used throughout this chapter to refer to various geographical areas is as follows:

- Local area refers to the Electoral Ward 2022 administrative areas of Mearns and Stonehaven and Lower Deeside and the committee area of Kincardine and Mearns;
- Regional area refers to North East Scotland (encompassing Aberdeenshire, Aberdeen City and Angus);
- National area refers to Scotland; and
- United Kingdom (UK).

Table 16.1: Study Areas for the Assessment Topics

Type of Impact and Study Area Description	Geography
Supply Chain and Investment Impacts	
The Study Area has been defined to capture broader employment and GVA impacts that may arise through supply chain activity and investment in the Proposed Development. For this assessment, impacts are presented at the UK and Scotland-wide levels, as well as for the regional economy. Specifically, the Study Area includes the UK, Scotland, and the region of North East Scotland (encompassing Aberdeenshire, Aberdeen City and Angus), reflecting the varying geographical scope of potential economic effects. The regional Study Area is considered an impact epicentre, reflecting the location of local suppliers with the required expertise as well as the potential locations under consideration for the O&M port in the North East and C&M port in Scotland.	UK Scotland North East region (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 activity. The demographics Study Area utilises the labour catchment area associated with the location of the Proposed Development, defined using the Office for National Statistics Travel to Work Areas (TTWAs). These 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. As such they are based on statistical analysis rather than administrative boundaries (Office of National Statistics, 2016). The Proposed Development is	Aberdeenshire Aberdeen City Kincardine and Mearns Mearns and Stonehaven and Lower Deeside

Type of Impact and Study Area Description	Geography
located within the Aberdeen TTWA, a large area that includes Aberdeen City and the majority of Aberdeenshire.[2] Data on demographics is gathered for the administrative areas of Aberdeenshire, Aberdeen City, and the 2022 Electoral Wards areas of Mearns and Stonehaven and Lower Deeside. Where data was not available at Electoral Ward level, it was gathered at the committee area level of Kincardine and Mearns.	
Changes to demand for housing and other services	
The Study Area for changes to demand for housing and other services is the same as that for demographic changes. Data on local services is gathered for the administrative areas of Aberdeenshire, Aberdeen City, and the 2022 Electoral Wards areas of Mearns and Stonehaven and Lower Deeside. Where data was not available at Electoral Ward level, it was gathered at the committee area level of Kincardine and Mearns.	Aberdeenshire Aberdeen City Kincardine and Mearns Mearns and Stonehaven and Lower Deeside
Changes to amenity of Public and Private Receptors	
The assessment utilises the study areas for the relevant EIA topics in the identification of significant residual impacts: **Land Use, Agriculture and Public Access:** The assessment of land use and public access is based on the Planning Permission in Principle (PPP) Application Boundary (which should include temporary land-take), plus an additional 500 m buffer area. **Landscape and Visual**: 3 km radius from the centre of the selected Landfall area; 1 km buffer either side of the cable centreline of the indicative 220/275 kV and 400 kV Cable Routes; and a 5 km radius from the Substation Search Area. **Air Quality:** Potential air quality impacts from construction dust were considered for people and property located within 250 m of the construction work area of the Proposed Development and people and property sensitive to dust located within 50 m of roads used by construction vehicles, and up to a distance of 250 m of the entrance to the construction work areas for the Proposed Development. **Noise and Vibration:** The area of land temporarily or permanently occupied during the construction, operation and maintenance, and decommissioning of the Proposed Development. **Traffic and Transport**: based on expected routes to be used by construction vehicles before which they would dissipate to levels where impacts would be not significant and/or form only low proportions of existing traffic flows such that impacts would be not significant (shown on Volume 1, Chapter 14: Traffic and Transport, Figure 14.1: Traffic and Transport Study Area). Receptors for inclusion in the assessment have been identified within a 500m buffer from the PPP Application Boundary. This is in cognisance of the 500m buffer used for identifying community assets and paths as per Chapter 6: Land Use, Agriculture and Access. Note that where significant residual impacts from the relevant topic chapters have been identified on receptors outside of this 500 m, the Study Area will be extended accordingly to ensure these are appropriately captured.	As noted in adjacent column

2 The Scottish council area of Angus has not been included in this assessment despite the proximity to the Substation due to the TTWA categorisation of the region as 'Arbroath and Montrose' and 'Dundee', suggesting residents are statistically less likely to commute to Aberdeenshire for work.

Type of Impact and Study Area Description	Geography
Changes to Tourism and Recreational Receptors	
The assessment utilises 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. The study areas for the relevant EIA topics are the same as those utilised in the assessment of '***Changes to amenity of public and private receptors'*** as outlined above. Recreational receptors (recreational areas, core paths, local paths and National and recreational cycle routes) have been identified within the 500m study area as per Chapter 6: Land Use, Agriculture and Access. Tourism receptors have been identified for the wider area encompassing the Traffic and Transport study area, due to the likelihood of visitors requiring to travel by vehicle to visit these attractions.	As noted above for *'Changes to amenity of public and private receptors'*
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 near the onshore infrastructure, the study area for assessing socio-cultural impacts has been defined at the local level.	Mearns and Stonehaven and Lower Deeside

16.3 Legislative and Policy Context

16.3.1 A summary of the policy provisions relevant to Socio-economics, Tourism and Recreation are provided in Table 16.2.

Table 16.2 Summary of Legislation and Policy Relevant to Socio-economics, Tourism and Recreation

Policy	How and where considered in the EIA Report
UK Policy Context	
UK Government (2024) Strategy and Policy Statement for Energy Policy in Great Britain	The statement sets out the UK Government's strategic priorities for energy policy, as required under the Energy Act 2013. It applies across England, Scotland, and Wales and acts as a guide to the energy sector for the actions and decisions needed to achieve the government's policy goals. The statement outlines a series of priorities aimed at achieving three key objectives of Great Britain's energy policy. These priorities are organised under the following headings: - enabling clean energy and net zero infrastructure; - ensuring energy security and protecting consumers; and - ensuring the energy system is fit for the future. Development of the Proposed Development will contribute the government net zero objectives. The Socio-economic, Tourism and Recreation chapter will ensure that both the economic and community impacts of the Proposed Development are considered in the completion of a successful EIA.
UK Government (2024) Clean Power 2030: Action Plan: A New Era of Clean Electricity	The plan sets out the ambitions for delivery in the path to 2030 and the expectations for the capacities of key technologies at national and regional level by 2030. Notably, the UK government outlines an ambition of 43-50GW of offshore wind capacity in the UK, as offshore wind is recognised as the backbone of the clean power system.

Policy	How and where considered in the EIA Report
	The plan notes how these ambitions will support economic growth, particularly in coastal regions. Offshore development will stimulate innovation, job creation and the reskilling of the oil and gas (O&G) workforce, which is likely to have positive spillover impacts in the local economy. The Proposed Development supports the achievement of these offshore ambitions, in terms of capacity and economic development along the coast. This chapter will consider the socio-economic impact of the Proposed Development, including employment, and any indirect and induced impacts in the local area.
Renewable UK (2024) Offshore Wind Industrial Growth Plan	The Plan details the aims, enablers and benefits of offshore wind as a catalyst for industrial growth. Notably, the two key aims of the plan is to grow supply chain capacity to accelerate and de-risk delivery and grow market share at home and abroad through a focus on key technologies. It also identifies existing clusters of supply chain capability, spreading from Northern Scotland to South West England. These clusters offer diverse capabilities, and when accompanied with effective coordination and leveraging of skills and expertise, will help strengthen the UK's comparative advantage. This chapter will assess how the Proposed Development supports some of these outcomes, particularly through the development of supply chain opportunities and capacity,
UK Government (2019) Offshore Wind Sector Deal	The Sector Deal aims to strengthen the UK's global leadership in offshore wind and support the transition to a low-carbon economy. It promotes strategic investment, skills development, and innovation to: - Enhance the competitiveness of UK firms, - Strengthen domestic supply chains, and - Create high-quality employment opportunities. These elements are directly relevant to socio-economic impact assessment, particularly in evaluating job creation, regional economic development, and supply chain engagement linked to the Proposed Development.
UK Government (2021) Build Back Better: Our Plan to Growth	This strategy aims to create growth in both new and emerging industries, as well as in established sectors across the UK. The strategic framework focuses on three core pillars: - Infrastructure, by investing in transport, digital networks and energy systems to boost productivity and support decarbonisation - Skills, by enhancing education and vocational training to equip the workforce for future industries - Innovation, by supporting R&D and technological advancement The strategy also emphasises: - levelling up economic opportunity across all UK regions; - transitioning to a net zero economy; and - positioning the UK as a leader in trade science and innovation (Global Britain). This strategy highlights opportunities for job creation and skills development, particularly in green industries and digital sectors as essential to fostering long-term economic resilience and enhancing social mobility. However, it notes that growth must be inclusive ensuring that investment in infrastructure, skills,

Policy	How and where considered in the EIA Report
	and innovation benefits all communities. These priorities are also reflected as key assessment criteria in this chapter.
Scottish Policy Context	
Scottish Government (2020) Offshore Wind Policy Statement	The policy statement builds on the ambitions outlined in Scotland's Energy Strategy. The statement suggests that as much as 11GW of offshore wind capacity is possible in Scottish waters by 2030. This will be supported by the ScotWind program and by working with industry partners to understand and tackle any barriers facing deployment. Furthermore, the policy statement notes a desire to develop the skills landscape and local supply chains to facilitate delivery, maximise economic benefits and promote resilience. In June 2025, the Scottish Government updated its ambition for offshore wind capacity and is aiming for the development of up to 40 GW by 2035-2040 in addition to existing operational capacity. The update reflects the significant increase in the number of potential offshore wind developments due to the ScotWind and the Innovation and Targeted Oil and Gas (INTOG) leasing rounds which concluded in 2022 and 2023 respectively. Public consultation on updating the policy statement closed on 13 August 2025. The consultation feedback analysis report is not yet available. The evaluation of economic benefits and supply chain engagement associated with the Proposed Development are discussed in the chapter.
Scottish Government (2020) Sectoral Marine Plan for Offshore Wind Energy	The plan delves into the strategic spatial vision for future commercial-scale offshore wind energy development up to 2030 and beyond (as outlined in the Offshore Wind Policy Statement). It assesses regions and areas of commercial-scale offshore opportunity, with the aim of maximising opportunity for economic development, investment and employment across Scotland. It also considers the potential risks associated with developments in these areas, such as the impact on marine wildlife and any overlaps with existing O&G infrastructure, ensuring that there are no adverse impacts on economic sectors and the local environment. The Scottish Government held a public consultation from May to August 2025 seeking views on the draft updated Sectoral Marine Plan for Offshore Wind Energy (SMP) and associated assessments, as part of the process to update the existing SMP (adopted 2020). A number of respondents objected to offshore wind in principle due to its potential environmental impact as well as effects on fisheries, tourism and local communities. Opportunities for job creation, supply chain growth, and regional regeneration were also highlighted by some respondents. The chapter will support the assessment of impacts of the Proposed Development on some of these aspects, particularly the regional economy, key economic sectors, tourism and local communities.
Scottish Government (2024) Offshore Wind Focus	Offshore Wind Focus outlines the findings of the Scottish Government's strategic assessment of market opportunities, ports and harbours, and supply chain capabilities, and presents the crucial next steps for maximising the economic opportunities presented by offshore wind. The assessment highlights that these opportunities within the sector and supply chain will generate high-quality jobs across sectors such as construction, planning, engineering and procurement, which, as

Policy	How and where considered in the EIA Report
	a result, will support a fair transition for the existing energy workforce. This is relevant for this assessment as the North East's historic economic ties to the O&G industry present a crucial opportunity for reskilling existing energy sector workers to support the deployment of offshore wind infrastructure in addition to ensuring an equitable economic transition within the region.
Scottish Government (2024) Scotland's National Performance Framework	The National Performance Framework is designed to give a rounded view of economic performance and progress towards achieving sustainable and inclusive economic growth and well-being across Scotland. The framework aims to: - create a more successful country; - give opportunities to all people living in Scotland; - increase the well-being of people living in Scotland; - create sustainable and inclusive growth; and - reduce inequalities and give equal importance to economic, environmental and social progress. In addition to GDP and employment, the National Performance Framework includes outcomes related to community wellbeing, education, environment, health, and poverty reduction. These indicators guide Scottish Government priorities and spending. This chapter will assess how the Proposed Development supports some of these outcomes, particularly through its local economic benefits, community impacts, and contribution to growth.
Scottish Government (2023) National Planning Framework 4	The National Planning Framework 4 (NPF4) is the national spatial strategy for Scotland, setting out the spatial principles, regional priorities, national developments and national planning policy. The framework supports developments that contribute to local employment, infrastructure, and sustainable communities. Under Policy 11c and 11e, renewable energy developments must demonstrate how they will maximise net economic impact, including local employment, supply chain opportunities, and community benefits. This shifts the focus from simply generating benefits to actively enhancing them, making socio-economic analysis a core part of project evaluation.
Scotland's National Strategy for Economic Transformation (2022)	Delivering Economic Prosperity, the title of Scotland's National Strategy for Economic Transformation, outlines the government's ambitions and strategies for enabling strong economic performance in the 10 years between 2022-2032. One key component of the strategy is the development of the ScotWind Offshore wind programme, a historic programme which promises to put Scotland at the heart of global offshore wind developments, support the net zero transition, and deliver large benefits in terms of the supply chain and job creation. The programme is also the first to see commercial development of floating windfarm technology, assisted by Scotland's subsea engineering capabilities. Achieving the ambitions of the ScotWind programme is a key priority, with developers' commitments to invest at least £1bn in the Scottish supply chain for each GW of capacity. The Scottish Offshore Wind Energy Council has a large role in driving forward these ambitions, encouraging collaboration and effective delivery in the sector. Regional Economic Partnerships also have a key role. Partnerships in the North East of Scotland have developed a Regional Economic Strategy, a collective vision and ambition for

Policy	How and where considered in the EIA Report
	economic diversification in the region. It centres around sustainability and outlines opportunities presented by the energy transition, the circular economy, offshore wind and Carbon Capture Utilisation and Storage (CCUS). This chapter will assess how the Proposed Development supports some of these outcomes, particularly through its local economic benefits, supply chain opportunities, and contribution to growth.
Draft Energy Strategy and Just Transition Plan (2023)	The plan outlines the government's strategy for delivering net zero by 2045, in addition to ensuring energy security, promoting economic opportunity and an achieving an equitable energy transition. Offshore wind, as one of the cheapest forms of electricity, has a vital role, and as of 2023, there was a reported potential pipeline of over 40 GW in offshore wind projects. The strategy highlights key ambitions, such as: - Significantly scaling up renewable energy production within offshore wind power, renewable hydrogen, marine energy, solar and hydro. - Increasing support for skills development to increase worker involvement in Scotland's transition to net zero. - ScotWind, the world's largest floating offshore leasing round, to deliver up to 27.6 GW of capacity. The North East is cited as a global centre of offshore energy production and innovation, and the skills of existing O&G workers will be vital for the energy transition. Indeed, the government commits to investing £26 million into The Energy Transition Zone in Aberdeen, to become a focal point and catalyst for high-value manufacturing, research, development, testing and deployment, with significant opportunities in offshore wind, hydrogen, and CCUS. Achievement of these ambitions is dependent on collaboration with key stakeholders such as existing O&G businesses and trade unions, and through successful regional partnerships, for instance with Aberdeen City Council and Opportunity North East. This chapter will assess how the Proposed Development supports some of these ambitions, for example through offering skills development and employment opportunities for O&G workers transitioning out of the industry.
Scottish Government (2020) Climate Emergency Skills Action Plan 2020-2025	While primarily strategic, this plan supports legislative commitments under Scotland's climate targets. It identifies five key opportunity areas and their associated skills implications, aiming to ensure Scotland's workforce is equipped to support the transition to a net zero economy. 1. Energy Transition 2. Construction 3. Transport 4. Manufacturing 5. Land Use This plan is directly relevant to this socio-economic assessment as this chapter will identify workforce development needs, skills profile, regional training opportunities, and the potential for job creation through the various phases of the Proposed Development.
Scottish Enterprise (2024) Net Zero Framework for Action 2024-2025	The net zero ambition focuses on economic opportunities that deliver benefits to the environment and society. There are five key areas of focus: - Supporting net zero innovation in businesses and organisations

Policy	How and where considered in the EIA Report
	- Delivering projects and programmes - Place development - Enabling activities - Becoming a net zero development agency by 2040 The approach includes elements which are fundamental to achieving a just net zero economy. These include capitalising on net zero market opportunities, adapting to climate change, protecting and improving biodiversity, stimulating circular economy practices and business models, and supporting green jobs and a just transition for businesses and sectors. The Proposed Development contributes to these goals by generating employment, supporting local supply chains, and enabling regional economic transformation aligned with net zero ambitions.
Programme for Government 2025-26 Building The Best Future For Scotland	The Programme for Government 2025–26 sets out the Scottish Government's priorities for the final year of the current parliamentary term, with a strong focus on growing the economy. This includes building resilience in the face of global challenges by investing in jobs, skills, innovation, rural development, and inward investment. These priorities are directly relevant to the Proposed Development and inform this chapter's assessment of its potential socio-economic impacts, including job creation, GDP contribution, skills development, and benefits to the local community.
Scottish Tourism Alliance (2020) Scotland Outlook 2030: Responsible tourism for a sustainable future	This strategy was developed by Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise, and Skills Development Scotland, and outlines a vision for world-leading 21st century tourism. The strategy promotes responsible tourism that balances economic growth with environmental sustainability and community wellbeing, the four core priorities include: - Our passionate people - Our thriving places - Our diverse businesses - Our memorable experiences This chapter will assess any impact the Proposed Development may have on local tourism and recreation in the region.
Regional Policy Context	
InvestAberdeen (2024) Regional Economic Strategy: A sustainable economic future for the North East of Scotland	This strategy outlines a vision for North East Scotland's economy to 2035, developed by Aberdeenshire Council, Aberdeen City Council, and Opportunity North East. It focuses on four key programme areas: - A thriving economy - An outstanding natural environment - A healthy, skilled population - Strong community and cultural identity The strategy sets out a long-term plan for the North East region of Scotland to take advantage of the opportunities being created by the transition to a net zero economy. It also outlines a vision for 2035 through five strategic objectives the priority actions for the next five years, and current economic challenges. The key objectives include: 1. To establish the North East as a pioneer of the energy transition, by delivering an 80% reduction in carbon emissions per head;

Policy	How and where considered in the EIA Report
	2. Maintain regional GVA as a share of Scotland's overall GVA while increasing the share of regional employment from the region's growth sectors; 3. Maintain a healthy, sustainable, working age population through increasing economic participation rates; 4. Become a Real living Wage region with 95% of overall employment offering a real living wage or higher; and 5. Protect and enhance the natural capital of the region by aligning to national ambitions to manage 30% of the region for people and nature by 2030. The socio-economic assessment of the Proposed Development will consider the generation of GVA, and employment opportunities which may help to attract people of working age and retain the population of the region.
Skills Development Scotland (2018) Regional Skills Strategy Aberdeen City & Shire	The strategy reflects the priorities set out in the Regional Economic Strategy and Aberdeen City Region Deal and Regional Skills Assessment, and seeks to address the skills implications of the significant changes to the North East economy taking place as a result of the downturn in the O&G industry. Four thematic areas for intervention have been identified as follows: - Responding to the downturn - Supporting economic transition - Repositioning the skills system - Supporting school-to-work transitions This assessment will examine the skills required and employment generated across the construction, operation, and decommissioning phases of the Proposed Development.
Visit Aberdeenshire (2022) Destination Aberdeen & Aberdeenshire: A Framework for Growth 2022-2030	The ambition for 2030 is for Aberdeen and Aberdeenshire to become Scotland leading visitor destination by: - Setting the pace for sustainable growth with visitors staying longer and spending more - Pioneering tourism business innovation - Being at the vanguard of delivering unique, high-quality visitor experiences - Going above and beyond customer expectations Attractors, that provide the greatest opportunities for growth include business events, culture & heritage, festivals, the natural environment and outdoor activities. Finally, the fundamentals for a successful industry include digital transformation, people & skills, travel connectivity and accessibility. Success will be guided by four principles: sustainable growth, leadership, partnership and people & skills. This framework highlights the region's priorities for tourism and identifies the critical factors for its success. These considerations are essential when evaluating the potential impact of the Proposed Development on the local tourism sector.

Policy	How and where considered in the EIA Report
Aberdeenshire Council (2023) Aberdeenshire Local Development Plan (LDP)	The Aberdeenshire LDP 2023 sets out the spatial strategy and planning policies guiding development across the region until 2031. It aims to balance sustainable economic growth with environmental protection and climate resilience, and includes land allocations for housing, employment, retail, and regeneration. Key policy areas include: - Meeting housing and community needs - The Vibrant city (tourism and culture) - Supporting Businesses and Industrial Development The plan is considered in the assessment of socioeconomic impacts as it promotes communities and encourages active travel and low-carbon development - including Wind Energy developments.
Aberdeen City Council (2023) Local Development Plan 2023	The plan sets out the spatial planning framework for the city through to 2033, guiding land use, development, and infrastructure investment. Key policy areas include: - Shaping business development - Shaping homes and housing Both policy areas are relevant in the context of the Proposed Development, which will impact on local business and supply chain and could impact on housing demand in the local area during construction.
Aberdeenshire Council (2024) Local Housing Strategy 2024-2029	The strategy outlines Aberdeenshire Council's approach to meeting housing needs across the region over five years. It is based on an assessment of housing demand, conditions, and affordability. Key priorities include increasing housing supply, offering diverse housing options, preventing homelessness, and working towards Net Zero by improving energy efficiency and reducing fuel poverty. This strategy is important in the context of the Proposed Development, as construction may impact local demographics and housing demand.
Aberdeen City Council (2025) Local Housing Strategy 2025-2030	The strategy aims to ensure that all residents have access to safe, affordable, and energy-efficient homes in thriving communities. It addresses key challenges such as homelessness, fuel poverty, ageing population needs, and housing-related health inequalities. The strategy outlines seven priorities, including increasing affordable housing supply, promoting independent living, improving housing quality, and supporting a well-managed private rented sector. This strategy is important in the context of the Proposed Development, as construction may impact local demographics and housing demand.
Aberdeenshire Council (2024) Economic Development Service Strategy 2024 - 2029	The strategy outlines a proactive approach to supporting economic diversification, resilience, and inclusive growth across Aberdeenshire, particularly in response to the decline of the O&G sector. Key priorities include: - Transition to a low-carbon economy; - Business support and innovation; - Place-based development, enhancing town centres, infrastructure, and connectivity; - Skills and workforce development; and - Regional collaboration, working with Aberdeen City and other partners through the City Region Deal and shared strategic frameworks.

Policy	How and where considered in the EIA Report
	The strategy recognises the need to balance economic growth with environmental sustainability, and to support communities affected by industrial transition.
Local Policy Context	
Stonehaven and District Community Council (2024) Stonehaven Local Place Plan	The assessment considers local impacts on Stonehaven and Lower Deeside, which is a ward in Kincardine and Mearns. The Local Place Plan highlights community-led priorities and ambitions to strengthen the town's identity as a vibrant coastal destination, improve infrastructure, support sustainable tourism, and safeguard its natural and built heritage. Key themes relevant to this assessment include active travel, housing provision, town centre regeneration, and enhancement of green spaces. The plan captures local aspirations and is intended to inform the Aberdeenshire Local Development Plan, helping ensure future planning decisions align with community values.

16.4 Consultation

16.4.1 The approach to consultation for the Proposed Development is set out in Volume 1, Chapter 4: Stakeholder Engagement and Consultation and in the Pre-Application Consultation (PAC) report. The objective of PAC is for local communities to be more informed about major proposals and can raise concerns before formal planning application is submitted to the planning authority. The PAC process included community engagement activities in addition to identifying and engaging with a wider spectrum of relevant stakeholders. A summary of the issues raised during consultation activities undertaken to date specific to Socio-Economics, Tourism and Recreation is presented in Table 16.3, together with how these issues have been considered in the production of this assessment.

Table 16.3: Summary of key consultation issues raised during consultation activities undertaken for the Proposed Development relevant to Socio-Economics, Tourism and Recreation

Date	Consultee and Type of Consultation	Summary of Issue(s) Raised	Response to Issue Raised and/or Where Considered in this Chapter
19/09/2024	2024 Bowdun Scoping Opinion (Aberdeenshire Council, Natural Environment Team, 2024)	A variety of issues were raised regarding the impact on some immediate natural sites and habitats. The consultee highlighted issues surrounding access. Although the core path along the coastline is acknowledged, concerns over access referenced the omission of some core paths and rights of way in other areas of the search corridor.	Comments noted. The core paths have been reviewed and are incorporated within the receptors identified for assessment in this chapter of the Onshore EIA Report. The assessment has been undertaken in accordance with the methodology proposed in the scoping report.

Date	Consultee and Type of Consultation	Summary of Issue(s) Raised	Response to Issue Raised and/or Where Considered in this Chapter
23/09/2024	2024 Bowdun Scoping Opinion (Scottish Forestry, 2024)	The consultee suggested that assessment should include a chapter on 'Woodland Management and Tree Felling', which notes the economic, social, and environmental values of the forest in addition to recognising any impacts on the landscape and habitat connectivity. The consultee requests that a collaborative approach is taken with all stakeholders involved to mitigate any forestry issues early on.	Comments noted. The Forestry and Arboricultural Technical Report (Volume 2, Appendix 6.1) presents the likely impacts with respect to forestry and arboriculture. As reported in Volume 2, Technical Appendix 6.1: Forestry and Arboricultural Report, due to construction of the new structures and unplanted cable easements, some of the woodland and TOW (Trees Outside Woodland) loss is considered permanent within the PPP Application Boundary. However, the Proposed Development will have a comprehensive mitigation proposal which includes planting of an equivalent area of new woodland to that which is lost. Volume 1, Chapter 6: Land Use, Agriculture and Public Access reports a Minor (Not Significant) effect on Fetteresso Forest Recreational Area. Amenity effect on Fetteresso Forest Recreational Area are also assessed in the 'Changes to tourism and recreational receptors' and 'Socio-cultural impacts' sub-topics within this chapter.
21/08/2025 – 22/08/25	Members of the Public, PAC Event Feedback (2025)	The topic of local economic development was raised at PAC for clarification.	TWP are committed to spending £600 million in Scotland for our Bowdun Project and an ambition to increase that to over £1 billion. The Project will create jobs during construction and operation as well as in the wider supply chain and generate wider economic benefits, such as increased spending in the local economy and investment in the region. The Project is actively supporting local businesses in overcoming barriers to entering the market, we have been running supply chain events and engaging with local businesses through our award-winning Supply Chain Pathways Programme. The Socio-Economic, Tourism and Recreation chapter assesses the impact of the Proposed Development on the on GVA and employment for the North East region, Scotland and the UK.

16.5 Data Sources

Desktop Study

16.5.1 Information on the baseline in the Socio-Economics, Tourism and Recreation Study Area was collected through a detailed desktop review of existing studies and datasets which are detailed in Volume 2, Appendix 16.1: Socio-Economics, Tourism and Recreation Baseline.

Table 16.4: Socio-economic, Tourism and Recreation Data Sources

Sub-topic	Source	Extent	Description	Year	Author
GVA, Skills and Employment					
Turnover	Annual Business Survey	Aberdeenshire and Aberdeen City	Breakdown of sectoral turnover	2024	Scottish Government
Employment	Annual Population Survey	Scotland	Data on economic activity, unemployment, and qualifications	2023	Office for National Statistics
Employment	Regional Skills Assessment	Aberdeenshire and Aberdeen City	Breakdown of sectoral employment and implications of reskilling energy sector workforce	2024	Skills Development Scotland
Employment	Scotland Employment Figures	Scotland	Data on quarterly employment levels	2025	Statista
Employment	UK Labour Market Statistics	UK	Data on UK employment numbers, workforce size and employment rates	2025	UK Parliament
Income	Annual Survey of Hours and Earnings 2022	Aberdeenshire and Aberdeen City	Data on average and median earnings	2023	Office for National Statistics
Income	Cities Outlook 2025	UK	2024 data on productivity, wages and population across UK cities	2025	Centre for Cities
Income	Household Income in Aberdeenshire Report	Local Area	Data on household incomes and income growth in local settlements	2025	Aberdeenshire Council
Income	Mapping Inequality in the UK	Aberdeenshire and Aberdeen City	Data on regional variation in income and productivity	2021	Office for National Statistics
Economic Growth and GVA	Scottish Annual Business Statistics 2022	Scotland	Data on GVA, with sectoral breakdowns	2024	Scottish Government

Sub-topic	Source	Extent	Description	Year	Author
Economic Growth and GVA	Gross Value Added (GVA)	UK	Data on UK GVA on a quarterly basis, including GVA methodology	2025	Office for National Statistics
Economic Growth and GVA	Regional gross value added (balanced) by industry and local authority: all ITL regions, sheet 3	UK and Scotland	Data on GVA by industry and local authority	2023	Office for National Statistics
Economic Growth and GVA	Aberdeenshire Council Strategic Assessment 2024/2025	Aberdeenshire and Aberdeen City	Data on projections of sectoral GVA and economic growth	2024	Aberdeenshire Council
Economic Growth and GVA	Key Sectors	Angus	Data on GVA per head and regional turnover	2022	Invest In Angus
Skills & Workforce	Official Census and Labour Market Profiles	Aberdeenshire, Angus and Aberdeen City	Data on labour demand and the labour market profile	2025	NOMIS
Skills & Workforce	Offshore Wind Skills Intelligence Report	UK	Understanding of skills and future workforce for the offshore wind industry	2023	Offshore Wind Industry Council
Skills & Workforce	Energy Skills Intelligence Hub – UK Energy Sector at a Glance	UK	Breakdown of energy sector by employment and skill level	2024	Energy Skills Intelligence Hub
Skills & Workforce	Department for Energy Security and Net Zero (DESNZ)	Aberdeenshire and Aberdeen City	Press Release on investment into reskilling the energy sector workforce	2025	UK Government
Skills & Workforce	Angus Council News	Angus	Information on new skills academy in Montrose	2024	Angus Council
Skills & Workforce	North East Scotland: Offshore Wind Report	Aberdeenshire and Aberdeen City	Forecasts the role of Aberdeenshire in the green energy transition	n.d.	Invest Aberdeen

Sub-topic	Source	Extent	Description	Year	Author
Skills & Workforce	Employment in the Oil and Gas Industry: Scottish Energy Statistics Hub	Aberdeenshire and Aberdeen City	Employment statistics for the Scottish O&G industry	2025	State of the Coast
Skills & Workforce	Workforce Insight Report	Scotland	Data on the reskilling ability of the workforce	2023	Offshore Energies UK (OEUK)
Skills & Workforce	A Just Transition for Aberdeen and the North East Report	Aberdeenshire and Aberdeen City	Reports on key concerns for the future of the region and potential mitigation	2025	Just Transition Commission
Skills & Workforce	Regional Planning for a Just Transition: A Case Study for the North East of Scotland	Aberdeenshire and Aberdeen City	Report summarising the key considerations for planning within the region as well as employment forecasts	2025	Just Transition Commission
Model	Scottish Annual Business Statistics 2022	Scotland	Data relating to the Production, Construction and Service Sectors in Scotland	2024	Scottish Government
Model	Supply, Use and Input-Output Tables: 1998-2021	Scotland	The Supply, Use and analytical Input-Output Tables produced by the Scottish Government	2024	Scottish Government
Model	Region – Business Register and Employment Survey: Table 3	UK	Annual employee and employment estimates for Great Britain and UK split by region.	2025	Office for National Statistics
Model	Table 1c - Regional gross value added (balanced) by industry: all ITL regions	UK	Annual estimates of balanced UK regional gross value added (GVA(B)).	2025	Office for National Statistics

Sub-topic	Source	Extent	Description	Year	Author
Model	Business Register and Employment Survey	UK	Open access, ONS Crown Copyright Reserved	2025	Office for National Statistics (NOMIS)
Model	FTE_105_Industries-2022 edition of this dataset	UK	Employment multipliers and effects in the UK, ONS	2025	Office for National Statistics
Model	UK input-output analytical tables: industry by industry	UK	Includes industry by industry and further analysis tables derived from the annual Supply and Use Tables (SUTs).	2025	Office for National Statistics
Model	Regional gross disposable household income: all International Territorial Level (ITL) regions	UK	Estimates of UK regional gross disposable household income (GDHI) at current prices for ITL1, ITL2 and ITL3 regions.	2025	Office for National Statistics
Model	Industry (two, three and five-digit Standard Industrial Classification (SIC)) – Business Register and Employment Survey (BRES): Table 2	UK	Annual employee and employment estimates for Great Britain and UK split by two, three and five-digit Standard Industrial Classification: SIC 2007.	2024	Office for National Statistics
Model	Cost associated with each element of the proposed development.	UK	A guide that describes the stages, activities and costs of the development of an offshore windfarm.	2025	BVG Associates
Demographic Changes					
Population	Mid-2023 Electoral Ward Population Estimates	Local Area	The number of people living in the local area	2024	National Records of Scotland
Population	Population Statistics	Aberdeenshire and Aberdeen City	Annual population of Aberdeenshire, and	2024	Aberdeenshire Council

Sub-topic	Source	Extent	Description	Year	Author
			2022 populations of wards and towns		
Population	Kincardine and Mearns Area Profile	Local Area	Data on population, demographics, the local economy and average house prices	2023	Aberdeenshire Council
Population Projections	2022-Based Population Projections of Scotland	Aberdeenshire and Aberdeen City	Estimates of future population size and structure based on current data and assumptions about demographic trends	2025	National Records of Scotland
Population Projections	Council Area Profile: Aberdeenshire	Aberdeenshire	Data on population and future forecasts	2025	National Records of Scotland
Population Projections	Council Area Profile: Aberdeen	Aberdeen City	Data on population and future forecasts	2025	National Records of Scotland
Population Projections	Aberdeenshire Joint Strategic Needs Assessment 2024	Aberdeenshire and Aberdeen City	Reports the regional trends in population, demographics and deprivation	2024	Aberdeenshire Health and Social Care Partnership
Potential Workforce and Population Changes	Construction Organograms - Bowdun	Local Area	Details the proportion of new job roles which will be fulfilled by workers from the local area in comparison to the proportion which require workers to move to the area	n.d.	Thistle Wind Partners (TWP)
Geographic Area	Travel to Work Area (TTWA) Analysis in Great Britain	UK	Information on the 2011 TTWAs in GB	2016	Office for National Statistics
Employment	Regional Skills Assessment	Aberdeenshire and Aberdeen City	Breakdown of sectoral employment and implications of reskilling energy sector workforce	2024	Skills development Scotland
Deprivation					

Sub-topic	Source	Extent	Description	Year	Author
SIMD	Scottish Index of Multiple Deprivation (SIMD)	Scotland	SIMD is an area-based measure of relative deprivation	2020	Scottish Government
Deprivation	Population Needs Assessment	Aberdeen City	Provides insight into regional poverty and deprivation	2021	Community Planning Aberdeen
Deprivation	Population Needs Assessment	Aberdeen City	Provides insight into regional poverty and deprivation	2023	Community Planning Aberdeen
Inequality	Employment, Earnings and Incomes in Scotland	Scotland	Breakdown of the variation in household earnings across Scotland	2023	The Institute for Fiscal Studies
Inequality	Area Profile	Aberdeenshire and Aberdeen City	Provides insight into deprivation levels and potential future concerns	2017	Aberdeenshire Community Planning Partnership
Poverty	Aberdeenshire Child Poverty Action Report 2023-24	Aberdeenshire and Aberdeen City	Insight on drivers on inequality in the region and data on child poverty	2024	Aberdeenshire Council
Supply Chain					
Supply Chain Strategy	Bowdun Offshore Wind Farm: Supply Chain Development Statement	Local Area	Information on supply chain targets and the process of how supply chains will be developed	2023	TWP
Supply Chain Capabilities	North East Scotland: Offshore Wind Report	Aberdeenshire and Aberdeen City	Information on the region's history in offshore wind and existing supply chain which will help support expansion in the sector	n.d.	Invest Aberdeen
Changes to Housing Demand and Supply					
Real estate	Housing Need & Demand Assessment 3	Aberdeenshire and Aberdeen City	The existing housing needs, demands and stock profile	2023	Aberdeenshire city council, Aberdeenshire council

Sub-topic	Source	Extent	Description	Year	Author
Prices	Housing prices in Aberdeen	Aberdeen	How average house prices and rents are changing in Aberdeen	2025	Office for National Statistics
Prices	UK House Price Index Scotland	Scotland	Average house prices	2025	HM Land Registry
Prices	Housing prices in Aberdeenshire	Aberdeenshire	Average house prices and rents	n.d.	Office for National Statistics
Vacant housing	Local authority total and vacant housing stock	Scotland	Vacant stock and length of vacancy	2024	Scottish Government
Ward profile	Kincardine and Mearns Area Profile 2023	Local Area	Property profile and house prices	2023	Aberdeenshire Council
Region Profile	Aberdeenshire Area Profile: Data tables 2023	Aberdeenshire	Data tables show housing stock statistics	2023	Aberdeenshire Council
Private Rented Accommodation	Local Housing Strategy 2025-2030	Aberdeen City	Insight into the importance of the private rental sector in Aberdeen and other key housing considerations	2025	Aberdeen City Council
Housing Projections	Strategic Housing Investment Plan 2026-2030	Aberdeenshire	Forecasts of housing development plans	2025	Aberdeenshire Council
Changes to Amenity of Local Public & Private Services					
Guidance	Guidance on assessing the socio-economic impacts of Offshore Wind Farms (OWFs)	UK	Guidance on the assessment of offshore windfarm developments	2020	Oxford Brookes University
Local Development Plans	Aberdeen City and Shire Strategic Development Plan	Aberdeenshire and Aberdeen City	Information on new housing, infrastructure and economic developments in the region	2020	Strategic Development Planning Authority

Sub-topic	Source	Extent	Description	Year	Author
Local Development Plans	Aberdeenshire Local Development Plan: Settlement Statements Kincardine and Mearns	Local Area	Information on the local plans for settlements across Kincardine and Mearns	2023	Aberdeenshire Council
Local Development Plans	Report to Infrastructure Services Committee: Aberdeenshire Local Development Plan 2029	Aberdeenshire	A look forward towards future trends and challenges which need to be tackled within the region	2025	Aberdeenshire Council
Employment	Regional Skills Assessment	Aberdeenshire and Aberdeen City	Breakdown of sectoral employment and implications of reskilling energy sector workforce	2024	Skills Development Scotland
Potential Workforce and Population Changes	Construction Organograms - Bowdun	Local Area	Details the proportion of new job roles which will be fulfilled by workers from the local area in comparison to the proportion which require workers to move to the area	n.d.	TWP
Public and Private Services	Address Base data & residual effects from other EIA topics	Local Area	Data on local services	2025	Ordnance Survey
Education	School Details	Aberdeenshire and Local Area	Details the quantity, names, and locations of schools in the region	2025	Aberdeenshire Council
Education	2024/25 Based School Roll Forecasts	Aberdeenshire and Local Area	Data on the number of pupils at schools and capacity projections	2024	Aberdeenshire Council

Sub-topic	Source	Extent	Description	Year	Author
Emergency Services	Kincardine and Mearns Area Committee Performance Report (Q3 1st Oct-31st Dec 2024)	Aberdeenshire and Local Area	Information on demand and provision of emergency services	2025	Scottish Fire and Rescue Service
Emergency Services	Aberdeenshire Local Policing Plan 2023-2026	Aberdeenshire and Local Area	Information on local police targets and deliverables	2023	Police Scotland
Emergency Services	Performance against Local Policing Plan 2023-26: North East Division Aberdeenshire	Aberdeenshire and Local Area	Information on police performance in line with plans	2024	Police Scotland
Emergency Services	Press and Journal	Aberdeenshire and Aberdeen City	Article on the current ambulance crisis in Aberdeen City and Shire	2025	Rutherford and Sabljak
Healthcare Services	Kincardine and Mearns Strategic Delivery Plan	Local Area	Information on demand and provision of health and social care services	2025	Aberdeenshire Health and Social Care Partnership
Healthcare Services	Kincardine and Mearns Locality Profile	Local Area	Information on health trends and facilities in the area	2024	Aberdeenshire Health and Social Care Partnership
Public Transport Services	Rural Challenges of Aberdeenshire Transport: Local and National Strategies. Surveys and Local Voices	Aberdeenshire and Local Area	Local concerns of public transport in the area, including demand and provision	2024	Aberdeenshire Community Planning Partnership
Changes to Tourism and Receptors					
Overnight Visitors	Centre for Cities	Aberdeenshire and Aberdeen City	Spending by overnight visitors	2024	Aberdeenshire Council
Number of Visitors, Tourism Employment and Economic Impact	Global Tourism Solutions	Aberdeenshire and Aberdeen City	Data on the number of visitors and the economic impact of	2025	Opportunity North East

Sub-topic	Source	Extent	Description	Year	Author
			tourism in Aberdeenshire, including tourism employment		
Tourism Businesses and Turnover	Visit Scotland – Research Insights	Aberdeenshire and Aberdeen City	Data on tourism employment, number of businesses, turnover and GVA	2024	Visit Scotland
Visitor Demographics	Scotland Visitor Survey	Scotland	Data on tourist demographics, tourist accommodation preferences, and the uptake of tourist activities	2023	Visit Scotland
Tourist Sites of Interest	Things to do in Aberdeenshire – Visit Aberdeenshire	Aberdeenshire and Aberdeen City	Information on key tourist attractions in Aberdeenshire	n.d.	Visit Aberdeenshire
Tourism Accommodation	Aberdeenshire Accommodation Audit 2023	Aberdeenshire	Breakdowns of tourism accommodation across regions in Aberdeenshire	2023	Visit Aberdeenshire
Tourism Accommodation	Aberdeen City Accommodation Audit 2023	Aberdeen City	Breakdowns of tourism accommodation in Aberdeen City	2024	Visit Aberdeenshire
Tourist Perceptions	Offshore Wind Farm Construction and Tourism	England	Evidence on the relationship between offshore wind farm construction and the local tourism sector in England.	2020	Biggar Economics
Tourist Perceptions	Offshore Wind Farm Developments – Public Perceptions (Survey)	Scotland	Findings from a survey exploring public perceptions of OWF developments in Scotland	2022	Scottish Government
Changes to Recreation Receptors					

Sub-topic	Source	Extent	Description	Year	Author
Recreational Receptors	Address Base data & residual effects from other EIA topics	Local Area	Data on local recreation receptors	2025	Ordinance Survey
Socio-cultural Impacts					
Local Community Concerns	Project Map: Hurlie 400kV Substation	Local Area	Provides supporting information and updates on local community feedback from the proposal of the nearby Hurlie 400kV Substation	2025	Scottish and Southern Electricity Networks
Community Wellbeing	Socio-Economic Assessment of the Hurlie (Fetteresso Substation)	Scotland	Measures the wellbeing of the study area using the WELLBY (Wellbeing-Adjusted Life Years) method	2024	BiGGAR Economics
Community Wellbeing	Social capital and community wellbeing in Scotland Report	Scotland	Information about the extent and nature of social connections and social capital from 2018/2019 - 2022	2024	Scottish Government
Social Capital	Social Capital in Scotland: Measuring and understanding Scotland's social connections	Scotland	Examines social connections within Scottish communities and ideas for improvement	2020	Scottish Government
Socio-cultural Values	Council Vision	Aberdeenshire	Information on the priorities of the local council to promote quality of life	n.d.	Aberdeenshire Council
Socio-cultural Values	Kincardine and Mearns Local Learning Community	Local Area	Information on the priorities of the area committee	2025	Aberdeenshire Council

Sub-topic	Source	Extent	Description	Year	Author
Socio-cultural Values	Kincardine and Mearns Priorities: Local Priorities	Local Area	Information on the priorities of the area committee	2025	Aberdeenshire Community Planning Partnership
Socio-cultural Values	Kincardine and Mearns Communities an Action Plans	Local Area	Information on the priorities of the area committee	2025	Aberdeenshire Community Planning Partnership
Guidance	Guidance on assessing the socio-economic impacts of OWFs	UK	Guidance on the assessment of offshore windfarm developments	2020	Oxford Brookes University
Wider Benefits					
Employer's Social Commitment	Construction Employer's Requirements: Local Positive Impact Requirements	Local Area	Details the employer's potential proposals and initiatives to create a positive impact in local communities	n.d.	TWP

16.6 Baseline Environment

Overview of Baseline Environment

16.6.1 The following sections provide a summary of the Socio-Economic, Tourism and Recreation baseline environment.

GVA and Employment

16.6.2 In 2023, Aberdeen City and Aberdeenshire's total GVA was estimated at £11.1 billion and £7.3 billion respectively, producing a combined figure of £18.4 billion, which is approximately 10% of Scotland's output (£183.5 billion) (Office for National Statistics, 2023). The workforce across these two local authorities was 258,700 people, accounting for 9.6% of Scottish employment (2.7 million) (Office for National Statistics, 2025; Office for National Statistics, 2025). Generally, household incomes, employment and qualification levels in Aberdeen City and Aberdeenshire are higher than Scottish averages (Aberdeenshire Council, 2025). In 2024, the local authorities had employment rates of 78.6% and 77.7% respectively, higher than the average in Scotland, 76.9% (Office for National Statistics, 2024) and average household incomes in Aberdeenshire (£45,853) were greater than in Scotland (£39,386). Average household incomes in local area settlements, such as Stonehaven, were also larger than this national average (Aberdeenshire Council, 2025). Whereas economic activity, qualification levels and gross weekly pay in Angus were lower than that of Scotland, Aberdeenshire and Aberdeen (Office for National Statistics, 2025). In Angus, gross weekly pay was recorded at £682.50, compared to £740.00 in Scotland, £783.90 in Aberdeenshire, and £721.70 in Aberdeen City. Angus' GVA was also much lower, estimated at £2.5 billion in 2023 (Office for National Statistics, 2023), with a workforce of 51,800 (Office for National Statistics, 2025).

16.6.3 Trends in Aberdeen and Aberdeenshire are linked to the North Sea Oil and Gas (O&G) sector, which in 2024, supported approximately 68% of all energy sector jobs in the 'Central Lowlands' region[3] (Energy Skills Intelligence Hub, 2024). However, the industry is declining, and the region is pursuing economic diversification, increasing investment into reskilling of O&G workers and the development of renewable energy sources (Community Planning Aberdeen, 2023). Offshore wind is a key priority for government investment. There were 21,899 energy sector jobs in the 'central lowlands' region in 2024, with 4,518 in Offshore Wind.

16.6.4 Census data indicates that the proportion of individuals in Mearns and Stonehaven and Lower Deeside wards with degree level qualifications or apprenticeships is higher than in Scotland (where 32.5% have degree-level qualifications and 7.7% have apprenticeship qualifications) with many people in these electoral wards working in skilled and technical industries (Scotland's Census, 2022).

[3]This is one of the three main geographical sub-divisions of Scotland which includes Aberdeenshire and Aberdeen City, as more disaggregated regional data for energy sectors is not available.

Population Demographics

16.6.5 Aberdeenshire is the 6th most populus council area in Scotland. Demographically, there is a lower-than-average population of children and a higher-than-average population aged 65 and over. Aberdeen City has a high population density and a predominantly working-age population. As of 2022, the electoral wards of Mearns and Stonehaven and Lower Deeside accounted for approximately 6% and 5.5% of Aberdeenshire's total estimated population, respectively (Aberdeenshire Council, 2023)

Housing and Vacant Property

16.6.6 Average rent prices across Aberdeen City and Aberdeenshire are on the rise (Office for National Statistics, 2025). The private rented sector plays a large role in Aberdeen, accounting for around 20% of households, with a lower-than-average proportion of owner-occupied households. Whereas, in Aberdeenshire, most properties are owner occupied (Aberdeen City Council and Aberdeenshire Council, 2025). Local authority total and vacant housing stock data (March 2024) illustrates that Aberdeen City had the highest amount of stock vacant (9.9%) across Scotland whilst Aberdeenshire's total vacancy rate is similar to that of Scotland (3.2% and 3.6%, respectively) (Scottish Government, 2024). This can be attributable to the decline of the O&G industry, which is resulting in net migration out of the city.

Local Services

16.6.7 Primary schools in Aberdeenshire are generally operating at a low capacity, whilst some secondary schools are facing capacity issues (Aberdeenshire Council, 2025). Healthcare services are facing increasing pressure due to the ageing population and tight spending constraints; however, vaccination and mental health services are performing well (Aberdeenshire Health and Social Care Partnership, 2025). Although Kincardine and Mearns has much lower demand for emergency hospital services compared to Scotland, 12,162 A&E attendances per 100,000 population, compared to 26,382 in Scotland (Aberdeenshire Health and Social Care Partnership, 2024),ambulance services in Aberdeen are struggling. NHS Grampian has the longest turnaround times of all the 14 health boards in Scotland (Rutherford, Sabljak, 2025). Fire and Rescue services are experiencing decreasing demand and are providing increased home fire safety visits in the region (Scottish Fire and Rescue Service, 2025). Despite Aberdeenshire South police service facing rising demand due to issues such as cybercrime, service provision is wide, and satisfaction rates are high (Police Scotland, 2024).

Tourism

16.6.8 Tourism is a significant contributor in the regional economy, attracting almost 3.7 million staying visitors and supporting 11,400 full-time equivalent jobs in 2024 (Opportunity North East, 2025). The local area of Mearns and Stonehaven and Deeside is home to a range of natural and cultural tourism assets, such as a coastline, castles and woodlands, and these are a primary motivator of travel for visitors (Visit Scotland, 2023). Generally, visitors are domestic travellers and tend to be of an older age demographic.

16.6.9 In Aberdeen and Aberdeenshire, tourism accommodation establishments are majorly non-serviced, predominantly self-catered accommodation (Visit Aberdeenshire, 2023; Visit Aberdeenshire, 2024; Visit Aberdeenshire, 2024). Aberdeen City has a total of 14,234 bed spaces (Visit Aberdeenshire, 2024) and Aberdeenshire has a total of 18,855 bed spaces (Visit Aberdeenshire, 2023) across serviced and non-serviced accommodation stock. By administrative area, Kincardine & Mearns has the third greatest proportion of the overall bed spaces available in Aberdeenshire, at 19% (Visit Aberdeenshire, 2023).

16.6.10 Tourism receptors within the PPP Application Boundary are shown in Table 16.7 below.

Socio-cultural Values

16.6.11 The Kincardine and Mearns area is centred around core values of environmental awareness, community empowerment, and supporting local businesses (Aberdeenshire Council, n.d.). In the local area, 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). Feedback received from engagement undertaken for the PAC emphasise these values. Concerns raised in the local communities of Johnshaven and Drumlithie surrounded the impact on the forest, the local landscape and biodiversity. Additionally, there was support for renewable energy and meeting net zero targets.

16.6.12 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, but not in the local area. Aberdeen City is suffering from increasing inequality, as the proportion of datazones in the 40% most deprived areas of Scotland has increased between 2016 and 2020. Aberdeenshire is also demonstrating signs of widening inequality, with an increase in relative child poverty from 7.6% to 12.1% between 2015 and 2022 (Aberdeenshire Council, 2024). In the local area of Mearns and Stonehaven and Lower Deeside, the majority of datazones are ranked in the 7-9 SIMD deciles, suggesting relatively low levels of deprivation. Figure 16.3 (Annex – Figures) illustrates the socio-economic deprivation profile in the study area for socio-cultural impacts.

16.6.13 Analysis undertaken by Biggar Economics (2024) indicates that the quality of life when measured by the WELLBY method across Aberdeenshire and Aberdeen City combined (602) is greater than Scotland as a whole (587).

Public and Private Receptors

16.6.14 This section sets out the public and private receptors within the Socio-Economics, Tourism and Recreation Study Area for the Proposed Development. These receptors are shown on Figure 16.4 (Annex – Figures).

16.6.15 Table 16.5 presents the community facilities identified within the Study Area for changes to amenity of public and private receptors. The list includes community centres, places of worship, education facilities and leisure facilities.

Table 16.5: Community Receptors

Facility	Description	Location
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

16.6.16 Table 16.6 lists the commercial receptors identified within the Study Area for changes to amenity of Public and Private Services, also shown on Figure 16.4[4] (Annex – Figures). Agricultural businesses are not included in the Socio-Economics, Tourism and Recreation assessment as these are assessed in Volume 1, Chapter 6: Land Use, Agriculture and Public Access.

Table 16.6: Commercial Receptors (non agricultural)

Facility	Description	Location
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

Tourism and Recreation Receptors

16.6.17 Tourism and recreation receptors in the Study Area for changes to Tourism and Recreation Receptors are presented in Table 16.7 and Table 16.8 and are shown in Figure 16.5 (Annex – Figures). Numbers for core paths, local paths and National and recreational cycle routes correspond to the reference numbers in Volume 1, Chapter 6: Land Use, Agriculture and Public Access.

Table 16.7: Tourism Receptors

Facility	Description	Location
Dunnottar Castle	Fortress	Stonehaven, AB39 2TL
Dunnottar Woods	Recreational Area	Stonehaven, AB39 3UJ
Dunnottar Cliffs	Scenic Viewpoint	Aberdeenshire, AB39 2TL
Todhead Lighthouse	Lighthouse	Montrose, DD10 0TH
Montrose Cove and Beach	Scenic Viewpoint	Montrose DD10 0HU

[4]Air BnBs/holiday homes are not shown on Figure 16.4 to protect the privacy of these locations.

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	Montrose DD10 0HT
Glenbervie House	House and Country Estate which has been modified into a hotel	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

Table 16.8: Recreational Receptors

Facility	Description	Location
Fetteresso Forest Recreational Area	Fetteresso Forest is a sprawling area that covers approximately 1,200 hectares. It is situated near the town of Stonehaven in Aberdeenshire, Scotland. The forest is a commercial woodland managed by Forestry and Land Scotland and is primarily composed of coniferous trees, providing a lush backdrop for outdoor activities.	As described in Volume 2, Appendix 6.2: Agricultural Land Holdings and Public Access and are shown on Volume 1, Chapter 6, Figure 6.3: Public Access Baseline.
Core Paths (1, 3, 7, 11, 12)	Include routes such as rights of way (which is usually a right of passage between two public places that people habitually go), footpaths, cycle tracks paths which are, or may be covered by path agreements.	As described in Volume 2, Appendix 6.2: Agricultural Land Holdings and Public Access and are shown on Volume 1, Chapter 6, Figure 6.3: Public Access Baseline.
Local Paths (4, 5, 8, 10, 13, 14, 15, 16, 17, 18, 19, 20, 21)	Local paths can either be pavements adjacent to roads or off-road paths that do not hold a statutory designation.	As described in Volume 2, Appendix 6.2: Agricultural Land Holdings and Public Access and are shown on Volume 1, Chapter 6, Figure 6.3: Public Access Baseline.

Facility	Description	Location
National and Recreational Cycle Routes (2, 6, 9)	National cycle routes are commonly a combination of pedestrian footpaths, disused railways, minor roads, canals, towpaths and traffic-calmed routes. Recreational cycle routes provide ways to different towns and scenic areas.	As described in Volume 2, Appendix 6.2: Agricultural Land Holdings and Public Access and are shown on Volume 1, Chapter 6, Figure 6.3: Public Access Baseline.

Healthcare Receptors & Emergency Services

16.6.18 As there are no healthcare receptors or emergency service receptors located within 500 m of the PPP Application Boundary, they have been excluded from the assessment of changes to amenity. Healthcare and emergency services are considered in relation to changes in demand, for which the baseline is presented in paragraph 16.6.7.

Future Baseline Scenario

16.6.19 The EIA Regulations require that "a description of the relevant aspects of the current state of the environment (baseline scenario) and an outline of the likely evolution thereof, without implementation of the project as far as natural changes from the baseline scenario can be assessed with reasonable effort, on the basis of the availability of environmental information and scientific knowledge" is included in the EIA Report.

16.6.20 An assessment of the 'without development' future baseline conditions for Socio-Economics, Tourism and Recreation is described in this section.

GVA and Employment

16.6.21 Between 2023 and 2026, Aberdeenshire's economy is projected to have grown at an average annual GVA rate of just 1.0%, trailing Scotland's 1.7% average. Future growth is expected to be driven by sectors such as Information and Communication (3.0%), Wholesale and Retail Trade (2.1%), and Utilities (1.9%). Looking ahead to 2026–2033, long-term GVA growth is forecast to slow further to 0.5% annually, below the national average of 1.1%, with Information and Communication (2.3%), Utilities (1.4%), and Real Estate (1.3%) leading sectoral contributions. This reflects a shift toward service-oriented and digital industries amid broader structural changes in the regional economy (Stanford & Watson, 2024).

16.6.22 There is likely to be future economic changes in the labour market. A report from Just Transition Commission reveals that, although employment in Scotland is forecast to grow, the region's workforce (Aberdeenshire and Aberdeen City) is projected to decline by 2.5% between 2027 and 2034 (Just Transition Commission, 2025). This is likely due to major changes at a sector level, most notably in the O&G Industry.

16.6.23 In 2025, the O&G industry provides 13,907 jobs in the Scottish 'Central Lowlands', which is 60% of all energy sector jobs in the region (Energy Skills Intelligence Hub, 2024). This is down from 68% in 2024. Similarly, across the UK, O&G

employment has fallen from 60% (of all energy sector jobs) in 2024 to 52% in 2025. Future projections highlight further decline in the industry, as this figure is likely to fall to 40% by 2030 (Energy Skills Intelligence Hub, 2024). Some estimates indicate that around 14,000 people in the region will need to have moved to other roles or sectors between 2022 and 2030 (Just Transition Commission, 2025). This indicates that a significant portion of the workforce will require reskilling. In the absence of new renewables projects, the creation of new energy sector jobs or the establishment of retraining programmes to transition workers into other industries, the region's 'offshore transition' may be inequitable to workers, employers, and local communities (Just Transition Commission, 2025; Aberdeenshire Council, 2025).

16.6.24 The O&G industry is expected to be overtaken by huge growth in the production of renewable energy, which is likely to support both the creation of new, high-quality jobs and the transition of O&G workers into skilled, 'green' jobs (Department for Energy Security and Net Zero, 2025). Offshore Wind (both fixed and floating) employment in the UK is projected to increase from 24% (2024) to 45% in 2030. This mirrors the employment growth of other renewables such as CCUS, which is projected to increase from 1.7% (2024) to 7.3% in 2030 (Energy Skills Intelligence Hub, 2024).

16.6.25 Offshore Wind is a key component of the energy transition and the UK government's objective to become a Clean Energy Superpower, promoting vast economic opportunities in the sector (Department for Energy Security and Net Zero, 2025). By 2030, the industry is forecasted to employ approximately 104,000 people, through both direct and indirect jobs (Offshore Wind Industry Council, 2023). The government have announced planned investment into the sector, focusing on the reskilling of O&G workers, particularly those based in Aberdeen and Aberdeenshire, promoting their transition into high-quality roles in renewable energy (Department for Energy Security and Net Zero, 2025).

Population and Demographic Changes

16.6.26 Scotland's population is projected to increase by 6.2% between mid-2022 and mid-2047 to a population of 5.8 million. This trend is supported by predicted increases in positive net migration, despite falling birth rates and a lack of 'natural growth' in the population (National Records of Scotland, 2025).

16.6.27 Out of the 32 council areas in Scotland, Aberdeenshire is projected to have the 11th highest percentage change in population size and will have the 6th highest population out of all council areas in 2028. Despite a projected 0.3% fall in the natural growth of population, Aberdeenshire is expected to experience population growth of 2.46% between 2018 and 2028, 0.7% higher than Scotland for the same period. This is predominantly driven by forecasted rises in net migration (National Records of Scotland, 2025). By 2030, it is estimated that Aberdeenshire will have a population of 268,300 (Aberdeenshire Council, 2025).

16.6.28 Aberdeenshire is likely to exhibit similar trends to Scotland, as projections suggest population growth is likely to be predominantly in the 65+ age group whilst the population of children and young adults is anticipated to fall (Aberdeenshire Health and Social Care Partnership, 2024). Notably, the 75+ age

group is projected to grow by 39.6% between 2018 and 2028. Nonetheless, in terms of size, 45 to 65 is projected to remain as the largest age group (National Records of Scotland, 2025).

16.6.29 In Aberdeen City, between 2018 and 2028, the population is projected to increase by 1.1% from 227,560 to 230,170, lower than the 1.8% projected rise for Scotland. This growth can be predominantly attributed to a projected increase in total net migration of 1% and a small rise (0.1%) in natural population change (more births than deaths). Aberdeen City is projected to have the 8th highest population out of the 32 council areas in Scotland in 2028 (National Record of Scotland, 2025).

16.6.30 When looking at demographic changes, Aberdeen City also is forecasted to have an ageing population, with the 0-15 age group projected to have the largest (3.2%) population decrease and the 75+ age group associated with the largest population increase of 16.1%. However, it is suggested that the 25-44 age group will remain the largest group (National Record of Scotland, 2025).

Housing and Other Services

16.6.31 Strategic Housing Investment Plans (SHIP) are a key part of the local housing strategy, setting out investment priorities and deliverables for affordable housing over a 5-year period. The recent plan (2026-2030) details that in the next 5 years, provided there is sufficient funding, SHIP could deliver 2291 new affordable homes across Aberdeenshire, where 507 are proposed for Kincardine and Mearns (Aberdeenshire Council, 2025).

16.6.32 Across both Aberdeen City and Aberdeenshire, the housing supply targets for 2020-2032 is 28,600, comprised of 10,010 affordable and 18,590 market homes, and looking ahead to 2033 and 2040, there are targets of building 18,720 homes across the two council areas (6,552 affordable and 12,168 market) (Strategic Development Planning Authority, 2020). LDPs will use these targets to identify land for development and focus will be on ensuring the developments meet identified need.

16.6.33 Within Kincardine and Mearns, certain towns and villages are likely to see local development. According to the 2023 Aberdeenshire LDP (Aberdeenshire Council, 2023), the Drumlithie to Laurencekirk Strategic Growth Area is forecasted to a key contributor in delivering strategic housing and employment allowances for the area. In Drumlithie, there are plans for 30 new affordable homes, linked by footway provision to the rest of the village. In Laurencekirk, land has been allocated for 7 housing developments, comprising of over 900 new homes. There have also been sites allocated for 49 new homes in Gourdon, 200 homes in Inverbervie, 67 homes in Johnshaven and many housing developments across Stonehaven (Aberdeenshire Council, 2023). Importantly, these new housing developments are likely to support the provision and expansion of additional capacity within local schools and medical centres and the improvement of local infrastructure, including transport, roads, and sport and recreational facilities (Aberdeenshire Council, 2023).

Tourism

16.6.34 VisitAberdeenshire produced 'Destination Aberdeen & Aberdeenshire: A Framework for Growth 2022-2030', which sets the ambition for Aberdeen City and Aberdeenshire to become Scotland's leading visitor destination by 2030 (VisitAberdeenshire, 2021). The strategy notes the trend of uncertainty in relation to global and national events (e.g. Covid-19 pandemic) and how visitor choices and behaviour respond to these in terms of changes to destination choice and activities. It is surmised that some changes may last but overall, fundamental motivations will remain the same. Additionally, a trend towards visitors enjoying adventures in the outdoors is noted as being of continued importance in the future, though concerns are highlighted in regards to overcrowding.

Socio-cultural Impacts

16.6.35 Future projections suggest a worsening of inequalities in the region, due to gaps in educational attainment (Aberdeenshire Council, 2024), infrastructure challenges, geographical immobility of labour, a lack of affordable housing, and rising fuel poverty (Aberdeenshire Community Planning Partnership, 2017). In Aberdeen City, the link between income deprivation and poorer health is becoming more prevalent, with projections suggesting a decline in healthy life expectancy, where those born between 2019-21 can expect to live about a fifth of their lives in poor health (Community Planning Aberdeen, 2023). As employment in skilled, high-paying O&G roles decline and the region pursues economic diversification, without appropriate measures of mitigation, there is potential for the exacerbation of inequalities in the future (Institute for Fiscal Studies, 2023).

Data Limitations and Assumptions

16.6.36 A limitation encountered during the collection of baseline data relates to the granularity of available information for the wider socio-economic impact topics. Where data at the local area of Mearns and Stonehaven and Deeside is not available, area committee of Kincardine and Mearns has been used. This was the case for data relating to local service capacity, tourism accommodation stock, and socio-cultural values. Where data on Kincardine and Mearns was not available, data for Aberdeenshire and Aberdeen City has been used. This was the case for data relating to average rental prices, vacant housing stock, tourism visitor statistics, social capital and community wellbeing, and WELLBYs. Due to the granularity of statistical information available for baseline information for these factors, these limitations are typical for this type of assessment, which relies on secondary data. As a result, the available data gathered to inform the analysis are considered sufficiently robust for the purposes of this assessment.

16.6.37 The Socio-Economics, Tourism and Recreation assessment is informed by other environmental topic chapters: Volume 1, Chapter 6: Land Use, Agriculture and Public Access; Volume 1, Chapter 8: Landscape and Visual; Volume 1, Chapter 12: Air Quality; Volume 1, Chapter 13: Noise and Vibration; and Volume 1 Chapter 14: Traffic and Transport. Thus, any assumptions and limitations for those

assessments also apply to the Socio-Economics, Tourism and Recreation assessment.

16.6.38 No site-specific surveys have been undertaken to inform the assessment for Socio-Economics, Tourism and Recreation, as it was deemed unnecessary at this current stage of the Proposed Development. However, key receptors within the PPP Application Boundary have been verified on site via a number of related visits undertaken for other environmental topics and, taken together, these surveys and the desk-study information has been used to inform the assessment of potential impacts of the Proposed Development.

16.6.39 A number of assumptions have been made to support the quantitative assessment of impacts on GVA, employment, and the supply chain. These include assumptions about the activities and industries associated with each expenditure category, and by extension, each phase of the Proposed Development. Two scenarios have also been developed, each combining two levels of expenditure with a 30 year approach to Operational Expenditure (OPEX) across Scotland and the UK.

16.6.40 The calculation of local economic impacts assumes that 35% Scottish supply chain spend will be with suppliers in the North East region for Scenario 1, and 50% spent with North East suppliers in Scenario 2. This is a conservative assumption based on analysis provided by TWP for the onshore capital works which indicates that 68% of expenditure could be accommodated by the supply chain in the North East region.

16.6.41 Full details of assumptions for the GVA and employment assessment are detailed in Volume 2, Appendix 16.2: Socio-Economic Impact Assessment Detailed Methodology.

16.7 Key Parameters for Assessment

Maximum Design Scenario

16.7.1 The Maximum Design Scenario (MDS) identified in Table 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 the same, or less, level of environmental effect. The scenario has been selected from the details provided in Volume 1, Chapter 2: The Proposed Development.

Table 16.9: 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
	C	O&M	D	
Impact on employment, GVA and supply chain	✓	✓	✓	Landfall Construction method: HDD/trenchless technique with an onshore entry point, indicative landfall location is approximately 100 m from the beach at Benholm Bay. HDD working area dimensions: 150 m x 200 m

Potential Impact	Phase			Maximum Design Scenario
	C	O&M	D	
				Transition Joint Bays (TJBs): up to 3 with each 20 m length x 4 m width x 4 m depth, concrete at grade and fenced Duration of Construction: 12-15 months <u>Onshore 220/275 kV Cable Corridor</u> Length: 22 km Construction method: Open cut where possible Cables: Three cable circuits in two trenches Construction Corridor Width (temporary): 50 m Trench depth: 1.65 m Cable cover to ground level: 1 m Construction compounds: Three compounds with total combined area of 3 ha HDD Cable Crossings: Up to nine crossings, each up to 120 m in length and up to 6 m depth, Launch Pit 70 m x 50 m, Receiver pit 50 m x 40 m Easement Corridor Width (permanent): 35 m Link Boxes: Every 500 m to 1,500 m (assume 63) <u>400kV Cable</u> Length: 1.2 km Construction method: Open cut where possible Cables: Two cable circuits in two trenches Construction Corridor Width (temporary): 3 5m Easement Corridor Width (permanent): 15 m Trench depth: 1.65 m Cable cover to ground level: 1 m <u>Cable Construction within Cable Corridor</u> Onshore cable area: 1135 km^2 Duration of construction (inclusive of pre-construction and restoration activities): 33 months <u>Substation</u> Substation footprint: 0.0973 km^2 Area of temporary works: 0.1324 km^2 Substation temporary construction compound: 0.0184 km^2 Duration of construction: 45 months. The MDS for impacts on GVA and employment also considers the offshore elements of the Project. The assessment of impacts on GVA and employment is based on the supply chain expenditure targets outlined in the SCDS for a typical offshore windfarm of this size. Detailed expenditure based on the Project infrastructure and design is not available at this stage.
Demographic Changes	✓	×	✓	<u>Landfall</u> Construction method: HDD/trenchless technique with an onshore entry point, indicative landfall location is approximately 100 m from the beach at Benholm Bay. HDD working area dimensions: 150 m x 200 m Transition Joint Bays (TJBs): up to 3 with each 20 m length x 4 m width x 4 m depth, concrete at grade and fenced

Potential Impact	Phase			Maximum Design Scenario
	C	O&M	D	
				Duration of Construction: 12-15 months <u>Onshore 220/275 kV Cable Corridor</u> Length: 22 km Construction method: Open cut where possible Cables: Three cable circuits in two trenches Construction Corridor Width (temporary): 50 m Trench depth: 1.65 m Cable cover to ground level: 1 m Construction compounds: Three compounds with total combined area of 3 ha HDD Cable Crossings: Up to nine crossings, each up to 120 m in length and up to 6 m depth, Launch Pit 70 m x 50 m, Receiver pit 50 m x 40 m Easement Corridor Width (permanent): 35 m Link Boxes: Every 500 m to 1,500 m (assume 63) <u>400kV Cable</u> Length: 1.2 km Construction method: Open cut where possible Cables: Two cable circuits in two trenches Construction Corridor Width (temporary): 3 5m Easement Corridor Width (permanent): 15 m Trench depth: 1.65 m Cable cover to ground level: 1 m <u>Cable Construction within Cable Corridor</u> Onshore cable area: 1135 km^2 Duration of construction (inclusive of pre-construction and restoration activities): 33 months <u>Substation</u> Substation footprint: 0.0973 km^2 Area of temporary works: 0.1324 km^2 Substation temporary construction compound: 0.0184 km^2 Duration of construction: 45 months.
Changes to demand for housing and other services	✓	×	✓	As above for MDS for changes to demographics.
Changes to amenity of local public & private services	✓	×	×	As above for MDS for changes to demographics. Also 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; Volume 1, Chapter 13: Noise and Vibration; and Volume 1, Chapter 14: Traffic and Transport.
Changes to tourism and recreation receptors	✓	✓	✓	As above for MDS for changes to demographics. Also 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; Volume 1, Chapter 13: Noise and Vibration; and Volume 1, Chapter 14: Traffic and Transport.

Potential Impact	Phase			Maximum Design Scenario
	C	O&M	D	
Socio-cultural Impacts	✓	✓	×	As above for MDS for changes to demographics.

Impacts Scoped Out of the Assessment

16.7.2 On the basis of the baseline environment and the Project Description outlined in Volume 1, Chapter 2: The Proposed Development, a number of impacts are scoped out of the assessment for Socio-economics, Tourism and Recreation. This was as per the Scoping Report (TWP, 2024) and was confirmed with stakeholders through scoping and receipt of Scoping Opinions.

16.7.3 These impacts are outlined, together with a justification for scoping them out, in Table 16.10.

Table 16.10: Impacts Scoped Out of the Assessment for Socio-economics

Potential Impact	Phase			Justification
	C	O&M	D	
Demographic Changes	×	✓	×	The level of employment at the Proposed Development during the operational phase is expected to be low. Therefore, it is not anticipated that there will be significant demographic impacts as a result.
Changes to demand for housing and other services	×	✓	×	There is not expected to be significant demographic effects during the operational phase and therefore the impacts that derive from demographic changes, such as housing demand, are also not expected to be significant during this phase
Socio-cultural impacts	×	×	✓	Socio-cultural effects are highly dependent on social baseline information and perceptions. Due to a likely lack of clarity on decommissioning activities and because the socio-cultural baseline is unlikely to still be applicable at the decommissioning phase it will not be possible to complete a meaningful assessment.

16.7.4 Following additional interrogation of baseline data and consideration of potential impacts, amendments were made to the scope set out in the Scoping Report, as follows:

- The Socio-Economic, Tourism and Recreation assessment will include an assessment on the potential for the Proposed Development to impact amenity for users of local public and private receptors, during the construction and decommissioning stage. The Proposed Development has the potential to influence these receptors during construction and decommissioning, depending on the other environmental impacts that are generated. O&M is scoped out due to the lack of significant impacts anticipated.
- Due to the interlinkages between changes to housing demand and changes to demand for public and private services – both of which are related to the change in demographics – these sub-topics have been combined.

16.8 Methodology for Assessment of Effects

Overview

16.8.1 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;
- 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).

16.8.2 The following sections describe the criteria used for evaluating the Socio-Economic, Recreation and Tourism effects. Some variations from this criteria for some sub-topics are outlined within the 'Assessment approach for Socio-Economic, Tourism and Recreation subtopics' section.

Criteria for Assessment

16.8.3 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 1, Chapter 3: EIA Methodology.

16.8.4 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

16.8.5 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 16.11.

Table 16.11 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	Local/regional communities
Changes in demand for housing and other services	Accommodation stock/local services
Changes to amenity of local public & private receptors	Public and private receptors
Changes to tourism and recreation receptors	Tourism and recreation receptors
	Regional tourism economy
Socio-cultural impacts	Local communities

Magnitude of change

16.8.6 The magnitude of change represents the scale or extent 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.

16.8.7 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.

16.8.8 For the quantitative assessment of impacts on GVA and employment, the assumed criteria for determining the magnitude of change is shown in Table 16.17.

16.8.9 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

16.8.10 Table 16.12 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.

16.8.11 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. For example, public receptors regularly used by vulnerable members of the community such as the elderly, school children and people with disabilities, who could be disproportionately affected by small changes in the baseline, may be assigned a high sensitivity. Private receptors such as holiday accommodation with scenic views may be more sensitive to visual impacts and may be assigned a high sensitivity.

Table 16.12 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

16.8.12 The significance of change is determined based on the magnitude of the impact and the sensitivity of the receptor, as presented in Table 16.13 and Table 16.14.

16.8.13 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.

16.8.14 Table 16.13 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.

16.8.15 Where a range is suggested for the significance of effect, for example, 'Minor' to 'Moderate', it is possible that this may span the significance threshold. Professional judgement will be applied to determine which outcome defines the most likely effect, which takes in to account the sensitivity of the receptor and the magnitude of impact. Where professional judgement is applied to quantify final significance from a range, the assessment will set out the factors that result in the final assessment of significance. These factors may include the likelihood that an effect will occur, data certainty and relevant information about the wider environmental context.

Table 16.13 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 16.14 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.

Assessment Approach for Socio-Economic, Tourism and Recreation Sub-Topics

16.8.16 The following sections outline the approach for assessing the magnitude of impacts and sensitivity of receptors for each Socio-Economic, Tourism and Recreation subtopic.

Impact on GVA and Employment

16.8.17 This section summarises the methodology and key assumptions for the assessment of potential impacts on GVA and employment, with the full methodology and assumptions provided in Volume 2, Appendix 16.2: Socio-Economic Impact Assessment Detailed Methodology.

16.8.18 The GVA and employment impacts will be quantified for the whole project including both the onshore and offshore elements. This is considered an appropriate approach, for the following reasons:

- At the time of this assessment, project expenditure estimates were only available for the Project as a whole and could not be disaggregated.
- The GVA and employment impacts are driven by the amount of expenditure going into the supply chain in different locations (UK, Scotland or the North East region) rather than the location (onshore or offshore) where the construction or operations activity associated with that expenditure occurs.
- Many activities, particularly during the operations phase, are associated with the overall development, and cannot be separated into onshore or offshore activities.
- The onshore and offshore elements of investment are intrinsically linked; neither would proceed in the absence of the other.

16.8.19 The Socio-Economic, Tourism and Recreation assessment for the offshore EIA is expected to include an updated assessment of GVA and employment impacts for both the onshore and offshore elements of the Project, based on refined project expenditure estimates and supply chain assumptions. Therefore the GVA and employment impacts presented in the offshore assessment should not be treated as additional to the GVA and employment impacts presented in this chapter.

16.8.20 The impacts will be reported in terms of:

- GVA (£m) - this is a measure of economic value added by an organisation or industry and is typically estimated by subtracting the non-staff operational costs from the revenues of an organisation. GVA impacts are presented in real, undiscounted terms (2025 prices).
- Jobs (FTE) - the number of Full-Time Equivalent roles created. This is used when considering employment impacts during the operational phase.

- Years of Employment (aFTE) - the total number of years of employment in Full Time Equivalent roles. This is used when considering short term employment impacts, such as those associated with the and construction and decommissioning phases.

16.8.21 The key inputs for modelling the impact on GVA and employment is the expected level of project expenditure. At the time of writing, detailed estimates for project expenditure are not yet available. Assumptions were derived using the supply chain expenditure targets from the Bowdun Offshore Windfarm Supply Chain Development Statement (SCDS) (TWP, 2023). The expenditure estimates are provided for each stage of the project including capital expenditure (CAPEX) and OPEX, split by geographic area (Scotland, UK, EU), under two scenarios - 'Commitments' and 'Ambitions'.

16.8.22 TWP are in the process of updating the SCDS for Bowdun Offshore Windfarm to reflect changes to the supply chain environment resulting from significant work being done to establish partnerships with regional and Scottish suppliers. As part of this, additional analysis has been undertaken by TWP to better estimate the supply chain expenditure related to the onshore elements of the Proposed Development and apportion potential supply chain spend regionally and nationally.

16.8.23 In acknowledgement of the changing supply chain context and imminent update of the SCDS, two scenarios will be modelled to capture the range of potential outcomes:

- Scenario 1 is based on the SCDS **Commitments** scenario, which reflects the lowest reasonable level of expenditure that the supply chain in each region would be capable of meeting, based on current capabilities.
- Scenario 2 acts as a more optimistic, high-case projection, aligned with strategic objectives. It is based on the SCDS **Ambitions** scenario, which reflects higher targets that aligns with the UK's ambition to achieve 60% local content in offshore wind farms off its shores by 2030.

16.8.24 In both scenarios, the SCDS expenditure figures were adjusted to include 30 years of OPEX for the full 30-year lifespan of the project, rather than the 6 years of OPEX assumed in the SCDS figures. This aligns with the 30-year Project lifespan assumed in Guide to an Offshore Wind Farm Update 2025 (BVG Associates, 2025).

16.8.25 The 2023 SCDS expenditure estimates are split by Scotland, UK, EU and World. It was assumed that the proportion of Scotland spend which would be awarded to North East suppliers is 35% in Scenario 1 and 50% in Scenarios 2. This was informed by analysis recently undertaken by TWP for the supply chain for civils scopes and buildings associated with the onshore works. This indicated that up to 68% of the capital expenditure in Scotland could be won by North East suppliers, due to the prevalence of large civil engineering businesses firms with established track-record in delivery of required scopes in this region. The modelling assumptions used are slightly more conservative (35% - 50%) in acknowledgement that the analysis described above was only for the onshore

capital expenditure and may represent a best-case scenario dependent on the availability of suppliers at the time of construction.

16.8.26 Decommissioning expenditure is not included in the SCDS. An assumption was made based on the Guide to an Offshore Wind Farm (BVG Associates, 2025), which estimates that the cost for decommissioning a 1 GW offshore wind farm is £426million (gross, excluding any resale value of equipment removed). This has been apportioned between Local, Scotland and UK expenditure assuming the same regional split as the SCDS capital expenditure estimates.

16.8.27 Table 16.15 and Table 16.16 illustrate the expenditure allocated across the three geographies for the Commitments and Ambitions scenarios, respectively. The figures in the tables are inclusive, i.e. Scotland spend includes North East, UK includes Scotland, and Rest of World includes UK.

Table 16.15: Scenario 1 – Commitments

Categories of spend		North East (£m)	Scotland (£m)	UK (£m)	Rest of World (£m)
CAPEX	Development	£21	£60	£94	**£120**
	Manufacturing / Fabrication	£2	£6	£346	**£1,600**
	Installation	£61	£174	£292	**£650**
OPEX	Operation + Maintenance	£630	£1,800	£1,800	**£2,250**
DECEX	Decommissioning	£15	£43	£132	**£426**

Table 16.16: Scenario 2 – Ambitions

Categories of spend		North East (£m)	Scotland (£m)	UK (£m)	Rest of World (£m)
CAPEX	Development	£30	£60	£94	**£120**
	Manufacturing / Fabrication	£208	£415	£1,015	**£1,600**
	Installation	£87	£174	£292	**£650**
OPEX	Operation + Maintenance	£900	£1,800	£1,950	**£2,250**
DECEX	Decommissioning	£58	£117	£252	**£426**

16.8.28 For each phase (construction, O&M and decommissioning), sectoral multipliers are applied to the projected investment figures to estimate effects on GVA and Employment across the North East region, Scotland and the UK.

16.8.29 Three types of economic impact are modelled:

- Direct Impacts: The immediate impacts (value and jobs created) that arise from each phase of the Project by organisations directly involved in project delivery.
- Indirect Impacts: The impacts generated by supply chain activity i.e. supply of goods and services to the direct contractors.
- Induced Impacts: The impacts generated from the increased household spending by those employed directly or indirectly through the project.

16.8.30 To quantify these impacts on GVA and employment, multipliers published by the UK and Scottish government or derived from national Input-Output tables

were applied to projected investment figures. These multipliers vary by type of impact (Direct, Indirect or Induced), expenditure location (UK or Scotland), and industry sector. Assumptions have been made regarding the industry sectors associated with each project phase and category of spend in order to allocate the relevant multiplier for each portion of expenditure.

16.8.31 The magnitude of change is classified as High, Medium, Low, or Negligible, based on the criteria set out in Table 16.17, using percentage changes in GVA and employment relative to the baseline. The percentage change in GVA is quantified relative to the total baseline GVA of the total North East, Scottish, and UK economies. The percentage change in employment is quantified relative to the baseline employment in relevant supply chain industries.

Table 16.17: Magnitude of Change Criteria

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

Demographics

16.8.32 The demographic impact of the construction phase employment is driven by:

- The number of direct jobs expected to be created during the construction stage; and
- The proportion of these jobs that are taken up by workers who already reside within the area.

16.8.33 The sensitivity of each of the demographic receptors will be determined by the trends in demographics in the potential host communities, projections estimated for how these demographics will change over time, and how the demographics of the workforce would relate to different communities. The magnitude of any demographic change will be determined by the change relative to the current population.

16.8.34 Demographic changes can have 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.

16.8.35 The potential for changes to demographics to have an impact on changes to demand for housing and other services and on socio-cultural factors are considered separately under those sub-topics.

Changes to Demand for Housing and Other Services

16.8.36 The impact on demand for housing as well as health services, education services, local leisure and recreation services, public transport services, and other services is influenced by the number of jobs created during construction and how many of those jobs are filled by works who already live in the area.

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

- The population of the community, including the wider TTWA;
- 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.

16.8.38 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.

16.8.39 The magnitude of any change for housing will be determined by:

1) the peak level of additional accommodation demand in each area, relative to the baseline accommodation provision; and

2) any demographic changes, determined by the baseline labour supply in each area and the relative size of any transient labour population.

Changes to Amenity of Local Public and Private Receptors

16.8.40 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, which is referred to as the Study Area for changes to Public and Private Services.

16.8.41 In addition to changes in demand to services outlined above, changes to the amenity value of local public & private receptors are considered (i.e. the enjoyment experienced by those who are using it). Amenity impacts are derived from the relevant EIA chapters: Land Use, Agriculture and Public Access (Volume 1, Chapter 6), Landscape and Visual (Volume 1, Chapter 8), Air Quality (Volume 1, Chapter 12), Noise and Vibration (Volume 1, Chapter 13), and Traffic and Transport (Volume 1, Chapter 14).

16.8.42 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.

16.8.43 Receptors are mapped against any significant effects identified for other relevant topics of the Onshore EIA Report. 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.

16.8.44 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.

16.8.45 The existence of a standalone or in-combination effects in relation to other chapters 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.

Changes to Tourism and Recreation Receptors

16.8.46 Studies have found that the presence of energy infrastructure itself does not have an effect on tourism and recreation assets, rather how visitors react to the other environmental effects that are caused by this infrastructure. The tourism and recreation assessment will be based on the sensitivity of the tourism economy, tourism assets in the study area and the magnitude of any potential change in behaviour.

16.8.47 Changes to tourism and recreation receptors are focused on how the construction and operation of the infrastructure could result in changes to the amenity value of the receptor. Amenity impacts are derived from the relevant EIA chapters: Land Use, Agriculture and Public Access (Volume 1, Chapter 6), Landscape and Visual (Volume 1, Chapter 8), Air Quality (Volume 1, Chapter 12), Noise and Vibration (Volume 1, Chapter 13), and Traffic and Transport (Volume 1, Chapter 14).

16.8.48 The assessment utilises the study areas for the relevant EIA topics in the identification of tourism and recreational receptors. 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. 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 visitors could be deterred as a result of changes in amenity and whether this could impact on the regional economy.

16.8.49 The existence of a standalone or in-combination effect in relation to other chapters 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.

Socio-Cultural Impacts

16.8.50 It is acknowledged that the local community may perceive the Proposed Development as having a negative impact on the socio-cultural characteristics of the area, arising from the transient construction workforce. This could result in a change in quality of life and community stress. Conversely, generation of employment in area could have a positive impact on community confidence, quality of life and wellbeing for individuals who secure these jobs.

16.8.51 A core aspect of the social fabric of the local communities is access to nature, with communities valuing the creation and maintenance of active travel and recreational facilities, such as forest paths, other footpaths and cycle routes, which are a priority in local policies and development plans. Changes to recreational receptors – even those that may not be considered significant in relation to visitor behaviour and the tourism economy - could impact on local communities in terms of their enjoyment of these assets and the wellbeing benefits derived from them.

16.8.52 The assessment of socio-cultural impacts is qualitative, considering the socio-economic baseline of the area, utilised outputs from the other Socio-Economic, Tourism and Recreation sub-topics, and builds on 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 Proposed Development are also considered where relevant.

16.9 Embedded Measures and Mitigation

16.9.1 As part of the design process, a number of embedded measures have been proposed to reduce the potential for impacts to those relevant to Socio-Economics, Tourism and Recreation noted in Table 16.18. They are considered at every stage of the Proposed Development through design and best practice and, as there is a commitment to implementing these measures, these have been considered in the assessment presented in Section 16.10 (i.e. the determination of magnitude and therefore significance assumes implementation of these measures).

Table 16.18: Embedded Measures Adopted as Part of the Proposed Development

Mitigation Reference	Embedded Measures Adopted as Part of the Proposed Development	Justification
GEN1	Avoidance of private property and housing	The cabling route and substation location has been informed by buffer zones from sensitive receptors, which includes the avoidance of settlements, groupings of private properties, where reasonably practicable.
	Avoidance of Community Land and Community Assets	The location and geographic extent of the PPP Application Boundary has been designed to avoid community land and assets, where reasonably practicable, including areas of open space (e.g. public parks and gardens, play areas, and sports areas) and community land. As such, there will

Mitigation Reference	Embedded Measures Adopted as Part of the Proposed Development	Justification
		be no permanent or temporary loss of community land and assets associated with construction, operation and maintenance and decommissioning of the Proposed Development.
	Avoidance of rights of way, including Core Paths and long-distance footpaths	The location and geographic extent of the PPP Application Boundary has been designed to avoid rights of way, including Core Paths and long-distance footpaths, where reasonably practicable.
GEN2	Production of a Construction Environmental Management Plan (CEMP) (including a Community Engagement Strategy)	An Outline CEMP forms part of the PPP application (see Volume 2, Appendix 2.2: Outline CEMP). A subsequent detailed CEMP will be produced at the MSC stage, in accordance with the Outline CEMP, and would be implemented during the construction phase of the Proposed Development. The CEMP will include best practice measures to mitigate noise and vibration; construction dust; landscape and visual impacts; and impacts on access and disruption to local communities. The CEMP will outline the requirement for the construction workforce to follow a Code of Conduct, ensuring appropriate behaviour in and around the construction activity. The CEMP will also include provision for a Community Engagement Strategy. This is expected to include: • Details of planned consultation and engagement with all relevant parties including site personnel, Employer, relevant local authorities; other statutory bodies and regulatory authorities, relevant community groups, recreational groups, and businesses and residents in local communities affected by the construction works. • Notifying occupiers of nearby properties of the nature and anticipated duration of planned construction works that may affect them.

Mitigation Reference	Embedded Measures Adopted as Part of the Proposed Development	Justification
		• Establishing means for enquiries and complaints to be logged and addressed by the relevant parties.
GEN3	Production of a Construction Traffic Management Plan (CTMP)	A full and detailed CTMP would be prepared in accordance with the outline CTMP prior to commencement of construction and agreed with relevant stakeholders, including Aberdeenshire Council and Transport Scotland. The CTMP will set out reasonably practical measures, including: • managing the number and routeing of Heavy Goods Vehicles (HGVs) during the construction phase; • managing the movement of construction workers during the construction phase; • managing the safe passage of HGVs along the local road network during the construction phase; and • details of any road improvements to facilitate the safe use of the road network.
SOCIO1	Production of Accommodation Strategy	An Accommodation Strategy is being prepared for both the onshore and offshore elements of the Proposed Development and would be progressed during the MSC stage. This document will set out how the project will meet the demand for accommodation from its workforce. Its main objectives will be to: • Support project delivery by providing clarity around the standards and types of accommodation where workers will be housed; and • Avoid any disruptions to local accommodation and, in this way, build local support for the project. In addition to working with supply chain companies to ensure opportunities to local content are maximised, the Applicant has committed to drafting an Accommodation Strategy, including information on the following: • Baseline on existing accommodation options (e.g.,

Mitigation Reference	Embedded Measures Adopted as Part of the Proposed Development	Justification
		tourism accommodation, private sector rentals, vacant homes), including any seasonality in accommodation demand. • Review of accommodation demand projections during the period of construction and other developments (housing) and projects (other energy transition projects) that might influence these. • Project requirements, including a profile of workforce expected at site by month of construction/decommissioning (this will contribute to identify peaks and troughs in demand, and interactions with seasonality of accommodation availability). • Information on stakeholder engagement: the partners with whom TWP has engaged. This is expected to include the local Council (housing and economic development teams), housing accommodation, accommodation providers and other businesses planning to build infrastructure in the same area (e.g., SSEN-T). • Plan and expectations on accommodating workers, including expectations on how workers will be accommodated and any implications this will have on procurement/the use of a local workforce.

16.10 Assessment of Significance

16.10.1 Table 16.9 summarises the potential effects arising from the Construction, O&M and Decommissioning phases of the Proposed Development, as well as the MDS against which each impact has been assessed. An assessment of the likely significance of the effects of the Proposed Development on the Socio-Economics, Tourism and Recreation receptors caused by each identified impact is given below.

16.10.2 Sensitivity of the receptors used to inform significance is assigned using the baseline information provided Section 16.6 and in Volume 3, Appendix 16.1: Socio-Economics, Tourism and Recreation Baseline.

Construction Phase

GVA and Employment Impacts

Magnitude of Impact

16.10.3 The assessment of GVA and Employment impacts comprises both the onshore and offshore elements of the Project. The assumptions and detailed methodology for this assessment are outlined in Volume 2, Appendix 16.2: Socio-Economic Impact Assessment Detailed Methodology.

16.10.4 The Project is expected to generate GVA benefits and employment opportunities across a range of sectors which will positively influence both the Scottish and wider UK economy by generating sectoral growth, enhancing productivity, and supporting long-term economic resilience.

16.10.5 TWP is committed to developing the offshore wind sector's workforce and skills. The SCDS for Bowdun Offshore Windfarm outlines TWP's commitments to several measures aimed at enhancing economic impact by encouraging the performance of contracts by local suppliers. This includes engaging with local suppliers and industry groups to understand their capacity to support the construction of the Project. TWP is also committed to further support companies through its award winning Supply Chain Pathways Programme which directly addresses an institutional barrier to Scottish supply chain participation in offshore wind by pre-qualifying companies with their pre-selected offshore construction Tier 1, DEME Offshore. By pre-qualifying Scottish suppliers TWP will create opportunities for those businesses on the Project but also other projects which DEME will bid to deliver in the UK and more widely. This approach is unique and differentiates TWP from other offshore wind farm developers.

16.10.6 High-value skilled jobs are driving the UK's transition to a net zero economy, delivering both environmental progress and strong economic returns. The net-zero sector is growing three times faster than the wider economy, with a 10.1% increase in total economic value over the past year, adding £7.7 billion to UK GVA. In contrast, the overall UK economy grew by just 3.2% in the same period (CBI Economics, 2025). Net-zero businesses support nearly one million jobs across the UK, in Scotland GVA per full-time equivalent worker in (i.e., productivity) reached £104,037, much higher than the regional average (CBI Economics, 2025).

16.10.7 More productive roles are generally associated with higher pay, with average salaries for employees in the net-zero industry around £43,100, exceeding the national average by 15% (CBI Economics, 2025). For example, wind turbine technicians, who play a vital role in expanding renewable energy infrastructure, earn between £25,000 and £47,000 depending on experience (National Careers Service, 2025). As the UK accelerates its green transition, investing in high-value skilled jobs will be key to driving regional growth, boosting productivity, and building a resilient, future-ready workforce.

16.10.8 The Project would present a strategic opportunity to integrate the existing Scottish O&G 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. TWP'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.

16.10.9 Through early engagement and collaboration with DEME Offshore, a global leader in offshore wind installation, the initiative will enable Scottish firms to pre-qualify for procurement opportunities not only within Bowdun but across broader UK and international projects. Furthermore, engaging with Scottish Enterprise Agencies and clusters that possess technical and contractual expertise can help de-risk supply chain investments and support local businesses that have relevant skills but limited offshore wind experience. By aligning investment planning and capability development with project requirements, the programme aspires to leverage Scotland's engineering expertise to foster regional economic diversification, enhance workforce resilience, and contribute to the global expansion of renewable energy supply chains (Offshore Engineer, 2025).

16.10.10 Table 16.19 provides the baseline conditions for GVA and employment for the North East, Scottish and UK economies and labour markets, Table 16.19 followed by the tables of estimated impacts under each scenario. The labour market includes employment in sectors associated with the Proposed Development. The sectors are aligned with ONS industry categories (Office for National Statistics, 2025) and are as follows:

- Manufacturing
- Electricity, gas, steam & air conditioning supply
- Water supply, sewerage, waste & remediation activities
- Construction
- Transport & Storage
- Financial & insurance activities
- Professional, scientific & technical activities
- Administrative & support service activities.

16.10.11 The economic impact has been assessed across direct, indirect, and induced effects for GVA and Employment for two scenarios, with outputs presented in Table 16.20 and Table 16.21. GVA impacts are presented in real, undiscounted terms (2025 prices). The majority of these impacts would be expected to occur during the construction phase, which is expected to be four years.

Table 16.19: Baseline Conditions

	Receptor	North East	Scottish Economy	UK Economy
Baseline	GVA	£20.9bn	£183.5bn	£2,601.6bn
Baseline	Employment	99,725FTEs	1.02mln FTEs	14.67mln FTEs

Table 16.20: Scenario 1 Construction Outputs

Construction Scenario 1			
	North East	**Scotland**	**UK**
Direct GVA	£36mln	£103mln	£291mln
Indirect GVA	£20mln	£56mln	£234mln
Induced GVA	£11mln	£32mln	£139mln
Total GVA	**£67mln**	**£191mln**	**£664mln**
Direct annual. Employment	504 aFTEs	1,440 aFTEs	4,125 aFTEs
Indirect annual. Employment	262 aFTEs	747 aFTEs	4,003 aFTEs
Induced annual. Employment	117 aFTEs	336 aFTEs	2,066 aFTEs
Total Annualised Employment	**883 aFTEs**	**2,523 aFTEs**	**10,194 aFTEs**
Direct Employment	126 FTEs	360 FTEs	1,031 FTEs
Indirect Employment	65 FTEs	187 FTEs	1,001 FTEs
Induced Employment	29 FTEs	84 FTEs	516 FTEs
Total Employment	**221 FTEs**	**631 FTEs**	**2,548 FTEs**

16.10.12 Scenario 1 CAPEX project expenditure would be expected to result in a total GVA impact of:

- £67 million in the North East, a 0.32% increase on the baseline total of £20.9bn GVA in the North East, considered a Low magnitude of change.
- £191 million in Scotland, a 0.10% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Low magnitude of change.
- £664 million in the UK, a 0.03% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a Negligible magnitude of change.

16.10.13 Scenario 1 CAPEX project expenditure would be expected to result in a total Employment impact of:

- 883 aFTEs, equivalent to 221 FTEs, in the North East, a 0.22% increase on the baseline total of 99,725 FTEs in the North East, considered a Low magnitude of change.
- 2,523 aFTEs in Scotland, equivalent to 631 FTEs, a 0.06% increase on the baseline total of 1.02 million FTEs in Scotland, considered a Negligible magnitude of change.
- 10,194 aFTEs in the UK, equivalent to 2,548 FTEs, a 0.02% increase on the baseline total of 14.67 million FTEs in the UK, considered a Negligible magnitude of change.

Table 16.21: Scenario 2 Construction Outputs

Construction Scenario 2			
	North East	**Scotland**	**UK**
Direct GVA	£139mln	£277mln	£567mln
Indirect GVA	£67mln	£134mln	£395mln
Induced GVA	£46mln	£92mln	£256mln
Total GVA	**£252mln**	**£503mln**	**£1.22bn**
Direct annual. Employment	1,790 aFTEs	3,580 aFTEs	7,732 aFTEs
Indirect annual. Employment	870 aFTEs	1,741 aFTEs	6,742 aFTEs
Induced annual. Employment	513 aFTEs	1,027 aFTEs	3,756 aFTEs
Total Annualised Employment	**3,174 aFTEs**	**6,347 aFTEs**	**18,229 aFTEs**
Direct Employment	448 FTEs	895 FTEs	1,933 FTEs
Indirect Employment	218 FTEs	435 FTEs	1,685 FTEs
Induced Employment	128 FTEs	257 FTEs	939 FTEs
Total Employment	**793 FTEs**	**1,587 FTEs**	**4,557 FTEs**

16.10.14 Scenario 2 CAPEX project expenditure would be expected to result in a total GVA impact of:

- £252 million in the North East, a 1.21% increase on the baseline total of £20.9bn GVA in the North East, considered a High magnitude of change.
- £503 million in Scotland, a 0.27% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Low magnitude of change.
- £1.22 billion in the UK, a 0.05% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a Negligible magnitude of change.

16.10.15 Scenario 2 CAPEX project expenditure would be expected to result in a total Employment impact of:

- 3,174 aFTEs, equivalent to 793 FTEs, in the North East, a 0.80% increase on the baseline total of 99,725 FTEs in the North East, considered a Medium magnitude of change.
- 6,347 aFTEs in Scotland, equivalent to 1,587 FTEs, a 0.16% increase on the baseline total of 1.02mln FTEs in Scotland, considered a Low magnitude of change.
- 18,229 aFTEs in the UK, equivalent to 4,557 FTEs, a 0.03% increase on the baseline total of 14.67mln FTEs in the UK, considered a Negligible magnitude of change.

Sensitivity of Receptor

16.10.16 The identified receptors (regional, Scottish, UK-wide economies and the Scottish/UK labour market) align closely with key policy priorities at both the regional level and across Scotland and the wider UK. Assigned sensitivity for these receptors is provided in Table 16.22. Further details on the justification for assigned sensitivity is presented in Volume 2, Appendix 16.2: Socio-Economic Impact Assessment Detailed Methodology.

Table 16.22: Sensitivity of Socio-Economic Receptors

Receptor	Sensitivity
Economy	
UK	Low
Scotland	Medium
North East	High
Labour market	
UK	Medium
Scotland	Medium
North East	High

SCDS Refresh

16.10.17 The SCDS used as the basis for the quantitative socio-economic assessment was submitted as a non-scored element of TWP's successful bid for an Agreement for Lease Option (ALO) for the E3 zone in the Crown Estate Scotland's ScotWind leasing process.

16.10.18 As a then, external investor to Scotland, TWP adopted a cautious approach to Scottish content in the project. In the intervening period TWP has undertaken a thorough assessment of evolving capabilities, competencies and capacity in the Scottish supply chain which will be required to support the development,

construction and operation of the project. This has led to several notable outcomes:

- Supply chain spend of £8m in Scotland across the Ayre Offshore Wind and Bowdun Offshore Wind projects to date to support development.
- Implementation of an award winning supply chain programme to create transition opportunities for oil & gas firms into offshore wind on the Bowdun project and with the pre-selected Tier 1 contractor responsible for delivering the majority of offshore scopes.
- A fourfold increase in expected Scottish CAPEX spend from onshore works alone from £6m (overall) to £29m (onshore only).

16.10.19 TWP is a signatory to the joint industry/government initiatives, the collaborative framework charter and Strategic Investment Model working to support the development of the right infrastructure and a manufacturing supply chain in Scotland. TWP also notes the advent of Green Freeports in Scotland, annual CFD auctions, the Clean Industry Bonus, Great British Energy, the Modern Industrial Strategy (and associated funds) and the Green Industrial Strategy in Scotland (and associated funds) as key enablers to growing the Scottish and UK industry.

16.10.20 A full refresh of the Bowdun Offshore Wind Farm SCDS is being undertaken and anticipated to be published in April 2026. In spite of the significant headwinds facing the industry, TWP's analysis points towards the real potential for further increase in anticipated spend in Scotland as demonstrated by the fourfold increase in Scottish CAPEX expectation to date.

Significance of the Effect

16.10.21 Table 16.23 Significance – Construction presents a summary of the combined magnitude of change and sensitivity of the receptors. The consequence of these elements is defined using Table 16.13 Matrix Used for the Assessment of the Significance of the Effect.

16.10.22 The significance rating is based on receptor sensitivity, impact magnitude, and key influencing factors. In cases where the significance matrix indicates a range (e.g. Moderate to Minor), for the UK impact the lower rating has been assumed, as a conservative assumption; and for the Scotland and the North East impact the higher rating has been assumed, because the impacts were estimated based on expenditure targets in the original SCDS which, as explained above, is now thought to have been conservative in terms of the proportion of spend which will go to contractors in Scotland.

16.10.23 No additional mitigation beyond embedded measures is considered necessary as the likely effect is not significant in EIA terms.

Table 16.23: Significance - Construction

Construction	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
North East					
Scenario 1	GVA	Low	High	Moderate (Beneficial)	Significant (Beneficial)
	aFTE	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scenario 2	GVA	High	High	Major (Beneficial)	Significant (Beneficial)
	aFTE	Medium	High	Major (Beneficial)	Significant (Beneficial)
Scotland					
Scenario 1	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	aFTE	Low	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Negligible (Beneficial)	Not Significant

Changes to Demographics

Magnitude of Impact

16.10.24 The employment that would be created as a result of the Proposed Development could have demographic impacts, if this employment helps to retain or attract people to the communities where this activity occurs.

16.10.25 Number of jobs for direct, indirect and induced employment are estimated in the above section for both the onshore and offshore elements of the Project using an economic model. For the Proposed Development, TWP's project civil engineer has generated a labour profile for the direct employment resulting from onshore works. This demonstrates a cumulative total for over 220 jobs. The split of these jobs by work package and where the workforce is expected to be sourced from is shown in Table 16.24. The construction period is anticipated to last approximately 4 years and peak construction workforce is expected to be 140 workers for approximately 1-3 months. The peak workforce is derived from the assumptions made on vehicle movements that have informed Volume 1, Chapter 14: Traffic and Transport.

16.10.26 The estimated number sourced from the regional area in Table 16.24 takes into account the draft employment targets to be written into the Employers Requirements and are the lowest estimation of the employment that could be sourced regionally (i.e. 40% for the substation and cable route and 10% for landfall) as representative of a worst-case scenario. These estimates are based on TWP's prior experience in relation to the skills availability in the region.

Table 16.24: Workforce Requirements for Proposed Development

Work Package	Minimum workforce required	Estimated number (%) sourced from Aberdeenshire and Aberdeen City
Substation	81	32 (40-60%)
Cable Route	89	36 (40-60%)
Landfall	52	5 (10-30%)
Total	222	73

16.10.27 As shown, a minimum of 73 (32.9%) of roles required for construction are expected to be sourced from Aberdeenshire and Aberdeen City. It is therefore assumed that the remaining 149 roles could be filled by workers from the remainder of Scotland and the UK.

16.10.28 While there are a number of small settlements in proximity to the Proposed Development, it is anticipated that the majority of the temporary workforce required for construction would reside within the larger settlements in the wider TTWA, which encompasses Stonehaven and Aberdeen City. These settlements have a combined population of approximately 238,900 and would have the capacity to absorb a relatively small increase in population (0.06%).

16.10.29 It also is noted that, although employment in Scotland is forecast to grow, the region's workforce (Aberdeenshire and Aberdeen City) is projected to decline by 2.5% between 2027 and 2034 (Just Transition Commission, 2025). This could result in people migrating out of the region to find work elsewhere, changing the existing demographic profile. The Proposed Development could therefore

have a positive impact on demographics by generating employment, thus encouraging working-age people to remain in the region and stimulating economic activity.

16.10.30 Considering the relatively low numbers of the construction workforce at the peak of construction in relation to the total population in the key population settlements in the regional area, the magnitude of impact on demographics during construction is considered to be Negligible.

Sensitivity of Receptor

16.10.31 To assign receptor sensitivity, demographic data for Aberdeenshire, Aberdeen City have been considered as a proxy for the TTWA. Mearns and Stonehaven and Lower Deeside have also been considered to provide context for more localised demographic conditions.

16.10.32 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. Overall, the demographics within the study area is considered to be of Medium sensitivity.

Significance of the Effect

16.10.33 Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Medium. The effect will therefore be of Negligible to Minor beneficial significance, which is not significant in EIA terms. Considering the proportion of the temporary construction workforce would be very low in comparison to the overall population in the TTWA, the lower significance rating of **Negligible** is deemed the most likely effect.

16.10.34 No additional mitigation above that which is embedded is considered necessary because the likely effect is not significant in EIA terms.

Changes to Demand for Housing and Other Services

Magnitude of Impact

16.10.35 While there are a number of small settlements in proximity to the Proposed Development, it is anticipated that the temporary workforce required for construction would reside within the larger settlements in the wider travel to work area, which encompasses Stonehaven and Aberdeen City.

16.10.36 The majority of the workers employed during construction of the Proposed Development will have specialist roles and their services would be expected to be needed either for relatively short periods (i.e. months rather than years) or they may only be required on site intermittently. For non-locally resident specialist workers of this type, it is considered more likely that they would generate demand for serviced or non-serviced accommodation (such as hotels,

bed and breakfast accommodation, or self-catering accommodation) rather than private rented housing.

16.10.37 In the context of the tourist accommodation availability in the study area for changes to demand for housing and other services, there were approximately 14,234 bed spaces in tourist accommodation in Aberdeen City (Visit Aberdeenshire, 2024) and 18,855 tourism accommodation bed spaces available in Aberdeenshire 2023. Kincardine & Mearns has the third greatest proportion of the overall tourist accommodation bed spaces available in Aberdeenshire, at 19% (Visit Aberdeenshire, 2024).

16.10.38 As noted above, it is expected that only a small proportion of the construction workforce would reside in private rented housing. Local authority total and vacant housing stock data presented in the baseline shows that in 2024, Aberdeen City had the highest amount of stock vacant across Scotland (2,300 units; 20% of Scotland's total vacant stock). Around round 1 in 5 households in Aberdeen belong to the Private Rental Sector, which is higher than the national trend (Aberdeen City Council, 2025). There is an existing oversupply in the Aberdeen City housing market and as a result there is likely to be a beneficial impact on the accommodation sector from an increase in demand.

16.10.39 Aberdeenshire has a total vacancy rate of 3.2%, aligned with the Scotland average of approximately 3%. This suggests the housing market has sufficient capacity to absorb a slight increase in demand. The magnitude of increased demand for housing is also used in the assessment as a proxy of potential increase in demand for other services such as education (i.e. school places for workers' children and for healthcare). In practice, many workers will not have families and will have below average demand for healthcare compared to the locally resident population.

16.10.40 Development and implementation of an Accommodation Strategy has been committed to by the Applicant for the Proposed Development 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.

16.10.41 Taking into account the relatively low numbers of the construction workforce at the peak of construction in relation to the high availability of private rental stock and tourist accommodation in the TTWA, and the preparation of an Accommodation Strategy, the magnitude of impact on housing demand and other services during construction is considered to be Negligible.

Sensitivity of Receptor

16.10.42 Taking into account the lower than average rental prices, high vacancy rates and ample availability of temporary tourist accommodation in Aberdeen City, Aberdeenshire and Mearns, Stonehaven and Deeside, accommodation stock is assigned a Low sensitivity.

16.10.43 Data presented in the baseline (Section 16.6, paragraph 16.6.7) highlights that there are capacity issues and increasing demand for secondary education and

ambulance services in Aberdeenshire and Kincardine and Mearns. Accordingly, local services are assigned a High sensitivity.

Significance of the Effect

16.10.44 Overall, the magnitude of the impact is deemed to be Low and the sensitivity of the receptor is considered to be Low/High (accommodation stock/local services). The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

16.10.45 No mitigation is considered necessary because the likely effect in the absence of mitigation is not significant in EIA terms.

Changes to Amenity of Local Public and Private Receptors

Magnitude of Impact

16.10.46 Changes to local public and private receptors were considered in relation to the significant residual effects from other environmental topic assessments that could affect users' enjoyment or functionality of these receptors. A significant residual effect identified in other environmental topics assessments does not necessarily constitute a significant effect on local public and private receptors; rather, the outputs of these chapters are utilised in determining the overall magnitude of change. Public and private receptors are identified in Table 16.5 and Table 16.6 in Section 16.6.

16.10.47 Four locations (two each on Auchenblae Road and Broomhill Road within Stonehaven) are reported in Volume 1, Chapter 14: Traffic and Transport as likely to experience significant effects as a result of impacts on Non-motorised User Amenities. Following implementation of mitigation measures these effects are expected to be reduced to a Minor (Not Significant) level. Therefore, no significant effects on local public and private receptors are anticipated as a result of the Proposed Development impacts on traffic and transport.

16.10.48 From the assessment presented in Volume 1, Chapter 13: Noise and Vibration, with the implementation of best practice measures, there are predicted to be no significant noise and vibration effects during construction. Potential significant effects were predicted for the construction traffic using minor local roads: C1K, south of Proposed Development; C20K, south of A90; and C14K, west of Three Wells. However, it is expected that these can be managed through measures within the CTMP. Therefore, no significant effects on public and private receptors as a result of noise and vibration impacts are anticipated.

16.10.49 The main clusters of housing within the study area are the villages of Arbuthnott, Benholm, Buckie's Mill & Newmill, Drumlithie, Gourdon, Inverbervie, Johnshaven, Rickarton and Tannachie , with the addition of individual or smaller clusters of properties located across the study area for local public and private receptors. In relation to access to local public and private receptors during construction, suitable mitigation measures will be applied, including maintaining access through use of diversions and phasing of construction activities. Volume 1, Chapter 6: Land Use, Agriculture and Public Access reports that, following mitigation, the temporary residual effects for Private Property and Housing and Community Land and Assets is Minor (not significant).

Therefore, no significant effects on public and private receptors from a change in land use and access is expected.

16.10.50 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.

16.10.51 Volume 1, Chapter 8: Landscape and Visual (Volume 2, Appendix 8.2) assesses impacts on individual dwellings and property clusters. These were reviewed in relation to holiday homes that corresponded with the dwellings identified in Appendix 8.2. Residual effects reported were as follows:

- 1 & 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)

16.10.52 Accordingly, for these receptors it is not expected that visual effects would result in an impact on business functionality.

16.10.53 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.

16.10.54 No significant residual effects have been identified from the relevant environmental assessments and as a result no combined amenity effects are anticipated. The magnitude of impact for changes in amenity for public and private receptors is therefore considered to be Negligible.

Sensitivity of Receptor

16.10.55 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.

Significance of the Effect

16.10.56 Overall, the magnitude of the impact is deemed to be Low and the sensitivity of the receptors are considered to be High. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Changes to Tourism and Recreation Receptors

Magnitude of Impact

16.10.57 Changes to tourism and recreation receptors were considered in relation to the significant residual effects from other environmental topic assessments that could affect users' enjoyment of these receptors, and how this could affect visitor behaviour in use of these assets, as well as perceptions of the area in general. A significant residual effect identified in other environmental topics assessments does not necessarily constitute a significant effect on tourism and recreation receptors; rather, the outputs of these chapters are utilised in determining the overall magnitude of change. Tourism and recreation receptors are identified in Table 16.7 and Table 16.8 in Section 16.6: Baseline Environment.

16.10.58 The assessment of construction dust undertaken for Volume 1, Chapter 12 (Air Quality) concludes that no significant effects are expected on sensitive receptors following the application of best practice measures included in the outline CEMP. Accordingly, no significant effect is expected to arise for tourism and recreational receptors from construction dust.

16.10.59 Construction routes within Volume 1, Chapter 14: Traffic and Transport assessment (shown on Figure 14.3) that provide access to tourism receptors were reviewed for residual significant effects related to sensitivity; severance; driver delay; Non-Motorised User (NMU) delay; NMU amenity; fear and intimidation; road safety. These are as follows:

- A92, southeast of A90 provides vehicular access to Dunnottar Castle, Dunnottar Cliffs; Dunnottar Woods; Todhead Lighthouse; Montrose Cove and Beach; RSPB Fowlsheugh Nature Reserve; Benholm Castle; Mill of Benholm; and Johnshaven Heritage Museum; and Maggie Law Maritime Museum. A Negligible (not significant) residual effect for this road across all elements was reported in Volume 1, Chapter 14: Traffic and Transport.
- A957, Slug Road provides vehicular access to recreational paths at Fetteresso Forest. Negligible to Minor (not significant) residual effects for this road across all elements was reported in Volume 1, Chapter 14: Traffic and Transport.
- B967, West of Gobbs Farm provides vehicular access to the Grassic Gibbon Centre and Arbuthnott Estate. A Minor (not significant) residual effect for this road was reported in Volume 1, Chapter 14: Traffic and Transport.

16.10.60 These effects take into account the implementation of embedded mitigation measures outlined in the Construction Traffic Management Plan (CTMP). None of the remaining tourism receptors - Glenbervie House, Castleton Farm Café, Montrose Museum and Montrose Air Station Scottish Wildlife Trust, Montrose Basin Visitor Centre and Wildlife Reserve – are expected to be affected by construction traffic impacts. Therefore, no significant effects on tourism receptors are anticipated as a result of changes to traffic and transport from the Proposed Development during construction.

16.10.61 From the assessment presented in Volume 1, Chapter 13: Noise and Vibration, with the implementation of best practice measures, there are predicted to be

no significant residual noise and vibration effects during construction. Potential significant effects were predicted for the construction traffic using minor local roads: C20K, south of A90; and C14K, west of Three Well. It is expected that these can be managed through measures within the CTMP. Therefore, no significant effects on tourism receptors from noise and vibration impacts as a result of the Proposed Development are anticipated during construction.

16.10.62 In alignment with the significant residual effects reported in Volume 1, Chapter 6: Land Use, Agriculture and Public Access and Volume 1, Chapter 10: Landscape and Visual, no tourism receptors are expected to be affected by changes to public access or visual impacts associated with the Proposed Development during construction.

16.10.63 Significant residual effects are reported in Volume 1, Chapter 10: Landscape and Visual on recreational receptors during construction: core paths, local paths and National and recreational cycle routes.

16.10.64 Volume 1, Chapter 8: Landscape and Visual reports a Major (Viewpoint 1) residual adverse effect for users of NCN 1 during construction. These effects would arise as a result of the temporary introduction of multiple construction elements which would contrast with the existing open rural landscape. However, the area would be restored to their pre-existing condition towards the end of the construction period.

16.10.65 Volume 1, Chapter 8: Landscape and Visual reports a Moderate residual adverse effect on users of Mid Kinmonth Circular Core Path (Viewpoint 2), arising from the introduction of the temporary access track and the loss of mature trees. However, construction effects would be considered short term (three months) and partly reversible, with the remaining permanent features visible during the operation and maintenance phase almost imperceptible within the landscape.

16.10.66 Volume 1, Chapter 8: Landscape and Visual reports a Major (Viewpoint 6) residual adverse effect for walkers in Fetteresso Forest. Local paths in Fetteresso Forest are 18, 19, 20, 21, Fetteresso Forest Circular, and Fetteresso Forest West Circular. Construction elements would be seen over relatively short distances and due to the elevated location of Viewpoint 6 would look across the construction site with it becoming a focal point within the view. Construction effects would be considered short term (4 years) and partly reversible.

16.10.67 In addition to the viewpoint assessment, Volume 1, Chapter 8: Landscape and Visual reports impacts on core paths and cycle networks. The majority of the significant impacts reported are captured above. However, a Moderate adverse significant visual impact during construction is also identified on Coastal Path: Johnshaven to Gourdon (core path 1), a section of NCN 1, where it passes adjacent to Benholm Beach and the Landfall.

16.10.1 Volume 1, Chapter 6: Land Use, Agriculture and Public Access reports a high magnitude of impact on Local Paths 4, 5, 7, 8, 10 to 27 due the likelihood of WCH journey lengths increasing by >500 m from route closures and/or diversions, and impacts on amenity arising from a change in views and increase in noise. The Medium to High sensitivity and High magnitude result in an overall

significance of Moderate to Major (temporary). Whilst this is defined as significant as per the EIA Regulations, potential impacts were reported as not significant in Volume 1, Chapter 6: Land Use, Agriculture and Public Access due to the temporary nature of any diversions or disruptions to the WCH route network.

16.10.2 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. It is also noted that in Fetteresso Forest Recreational Area there are a number of undesignated trails used by runners and mountain bikers. Due to the unofficial nature of these trails, these have not been assessed specifically; though it is assumed that impacts on these trails would be similar to those identified for the designated routes discussed above.

16.10.3 In relation to the broader sense in which tourist perceptions of an area could be impacted by construction of the Proposed Development, research has been undertaken by Biggar Economics (2020) into this specifically, analysing indicators of the tourism industry in 11 comparable cases in England.

16.10.4 The Biggar Economics (2020) research assessed the empirical evidence on the relationship between offshore wind farm construction – and associated infrastructure such as cabling and the onshore substation – to identify any changes in visitor behaviour or spending during the construction period. No evidence was found to support this. Instead, it was found that areas, including those with landscape sensitivities, were not impacted by the construction activities of offshore wind farms (Biggar Economics, 2020).

16.10.5 Taking into account the conclusions of the relevant topic assessments, no significant residual environmental effects are expected during construction that would impact on tourism receptors in relation to the ability of tourists to enjoy these attractions, or that would deter them from visiting. For recreational receptors visual impacts on recreational cycle routes, walking paths and Fetteresso Forest Recreational Area are expected to arise during the short-term as a result of visual effects during construction of the Proposed Development. However, no significant residual environmental effects are reported for the other relevant topic assessments. As a result, the in-combination amenity impact on tourism and recreation receptors is anticipated to be minimal. The magnitude of impact on tourism and recreation is therefore considered to be Low.

Sensitivity of Receptor

16.10.6 Tourism is a significant contributor to the regional economy (Aberdeen City Council, 2024), employing 11,400 full time equivalent jobs in 2024. Many visit Aberdeenshire for its coastline, its natural landscapes and activities. The regional tourism economy is resilient, with tourism in the region on an upward trajectory. The economic impact of tourism across Aberdeen 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 regional tourism economy, it is considered to be robust and resilient to change, and therefore is of Low sensitivity.

Significance of the Effect

16.10.7 Overall, 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 Negligible to Minor adverse significance, which is not significant in EIA terms. Considering that the high likelihood that there will be a perceptible change in amenity for users of recreation receptors during construction - albeit temporarily and appropriately managed by mitigation measures - the higher significance rating of **Minor** is deemed the most likely effect.

Socio-cultural Impacts

Magnitude of Impact

16.10.8 The Proposed Development may lead to socio-cultural impacts, including potential disruption to community cohesion, changes to the character of local communities and the generation of employment.

16.10.9 During construction, local communities may experience stress from disruption caused by construction activities and the presence of a transient workforce. As assessed under 'Changes to demographics' and 'Changes to housing and other services', the construction workforce will be relatively low in number, and workers are expected to reside in the wider TTWA area. The construction workforce is not anticipated to have a significant effect on demographics or demand for housing and services in the local area. The workforce will follow best practice requirements and a Code of Conduct in and around the site and within local communities, implemented as part of the CEMP. Taking this into consideration, it is not expected that the temporary presence of the construction workforce would change cultural dynamics or impact social cohesion in the local area.

16.10.10 Environmental effects arising during the construction phase and how these could affect enjoyment and functionality of community and commercial assets have been assessed under 'Changes to amenity of local public and private receptors', with no significant effects reported. It is noted that Drumlithie is the closest settlement to the construction works, with the potential to experience the greatest degree of disruption; however, this would be temporary and mitigated by measures outlined in the CEMP and CTMP. 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.

16.10.11 Community empowerment, spirit, and engagement are central to local identity, with wellbeing supported by access to nature and recreational infrastructure. Active travel networks, including Public Rights of Way, National Cycle Routes, forest paths, and other footpaths, are a core part of the social fabric and are prioritised in local policies and development plans. However, consultations on similar proposals (e.g. the Hurlie Substation) have highlighted high socio-

cultural sensitivity in rural areas, where land use, biodiversity, and recreational access are closely tied to community identity. As assessed under 'Changes to tourism and recreation receptors', there are significant visual effects identified on several recreational routes: NCN 1, Core Path Johnshaven to Gourdon (1), Core Path Mid Kinmonth Circular (12), and Local Paths 18, 19, 20, 21, Fetteresso Forest Circular (16) and Fetteresso Forest West Circular (17). While the overall amenity effects on recreation receptors are assessed as Minor (not significant) in the context of regional tourism and recreation, there could be a greater impact on local communities that are more likely to use these routes frequently and be reliant on them for physical and mental wellbeing.

16.10.12 In particular, Fetteresso Forest Recreational Area has been noted by the local community during consultation as integral for community enjoyment, recreation, and health. Amenity impacts at Fetteresso Forest Recreational Area are considered in the context of the existing commercial activity, where existing tracks into the substation are currently maintained for forestry operations. Disruption to access and visual impacts would be temporary and mitigated by measures outlined in the CEMP and TMP, including the phasing of construction works and reinstatement of paths as soon as practicable.

16.10.13 Positive impacts on community wellbeing could arise during construction of the Proposed Development. Analysis undertaken for the 'Commitments' scenario found that around 793 aFTEs and 1,587 aFTEs are expected to be directly supported in the North East and Scotland respectively during the construction phase of the onshore and offshore elements of the Project at its peak. A minimum target for direct employment in construction roles to be sourced from Aberdeenshire and Aberdeen City - between 40-60% for the substation and cable route elements and 10-30% for landfall elements - will be written into the Employer's Requirements.

16.10.14 Opportunities therefore exist for people living in the local area to be employed during the construction and operation of the Proposed Development. This could be of particular benefit to people seeking to transition out of employment in the O&G sector; in Aberdeen City and Aberdeenshire, as of 2021, direct employment in O&G had already declined by nearly 33% since 2015 (Just Transition Commission, 2025). The Proposed Development would provide opportunities for employment in high-quality, skilled jobs that are future-ready; these roles are likely to be attractive to employees seeking diversification from the O&G 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). Improving job security and precarity could therefore result in an uplift in wellbeing and quality of life for people in the local area that may be able to secure employment with the Proposed Development.

16.10.15 While there is no impact anticipated on community cohesion arising from changes in demographics and changes to demand for housing and other services, it is acknowledged that nature and outdoor recreation – particularly Fetteresso Forest Recreational Area - is of importance to the local community and that recreational routes will be subject to temporary amenity effects during

construction. In relation to the potential for a benefit to community wellbeing arising from upskilling and employment opportunities, as the local communities already have a relatively higher income and quality of life than Scotland overall, such a change is likely to be minimal. The overall magnitude of impact on the socio-cultural character of local communities during construction is therefore considered to be Low.

Sensitivity of Receptor

16.10.16 Quality of life when measured by the WELLBY method across Aberdeenshire and Aberdeen City[5] 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 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. Local communities have therefore been assigned as High sensitivity.

Significance of the Effect

16.10.17 Overall, 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. The effect will therefore be of **Minor** to **Moderate** adverse significance. 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.

Additional Mitigation and Residual Effect

16.10.18 To reduce impacts on recreational routes of importance to the local community, TWP will consult with relevant stakeholders – such as community councils, recreational groups, Aberdeenshire Council, Forestry and Land Scotland and the Woodland Trust - in relation to NCN 1, Core Path Johnshaven to Gourdon (1), Core Path Mid Kinmonth Circular (12), and paths in Fetteresso Forest Recreational Area to identify opportunities for betterment to these recreational areas and/or other local recreational areas, that could be implemented to offset effects (SOCIO2). This could be delivered via the provision of community benefit funds associated with the Project (see Community Empowerment below).

16.10.19 Following mitigation, the effect will reduce to **Minor** adverse significance, which is not significant in EIA terms.

Community Empowerment

16.10.20 TWP has undertaken a series of community events in Aberdeenshire to introduce the Proposed Development to local people. These events aim to provide information, gather feedback from community and increase engagement with local stakeholders. These events were followed by formal Pre-Application Consultation (PAC) events undertaken in August and October 2025.

[5] Data only available at local authority level.

These events seek to empower the local communities by promoting transparency and considering local needs and priorities into the planning process. Full details of community engagement undertaken is provided in the PAC report and in Volume 1, Chapter 4: Stakeholder Engagement and Consultation.

16.10.21 Provision of a community benefit fund and/or shared ownership which may be linked to operational performance of the wind farm is actively being considered for the Proposed Development. However, Policy and requirements for community benefit are under review both by Scottish Government, but also at the UK Department for Energy Security & Net Zero; the latter is considering introduction of mandatory community benefit and how best to facilitate shared ownership. Given this policy uncertainty, as well as provision of Community Benefit not being a material consideration, further details on community benefit and shared ownership would be agreed post consent. The Proposed Development will meet the legislative requirements and consider updates to any guidance that emerges post consent. TWP looks to support community empowerment and have a positive impact on the local communities our projects are within.

STEM Initiatives

16.10.22 TWP recognise the importance of ensuring the future workforce has the capacity to ensure the growth of the renewables sector; the Offshore Wind industry is forecast to employ approximately 104,000 employees in the UK by 2045, comprising 45% of all energy sector jobs (Offshore Wind Industry Council, 2023).

16.10.23 TWP has undertaken various STEM outreach activities in Aberdeenshire since 2024, including YESC Celebration Day, TechFest Activity Weekend, TechFest Aberdeen Science Festival, and Aberdeen Science Centre Workshops with regional primary schools. These events are run as workshops with the aim of encouraging young people in the Proposed Development region to engage with the project and learn about offshore wind. Participants learn how turbines work, where they are located, substation information and environmental aspects. Over 3,500 children have taken part in these events to date. Additionally, a Developing the Young Workforce North East workshop was held at Mearns Academy in Laurencekirk as part of a STEM Careers Fair. This event provided the community and project region schools with information on potential STEM and offshore wind prospective jobs, encouraging young people to consider a career in the sector.

Operation and Maintenance Phase

Impact on GVA, Employment and Supply Chain

Magnitude of Impact

16.10.24 Jobs created during the Operation and Maintenance phase are expected to span Technical, Managerial, Health, Safety & Environmental (HSE), and Procurement & Logistics roles. Technical positions, including those requiring engineering expertise, are anticipated to be readily filled by the local workforce, supported by the presence of established civil engineering firms in the region with proven

experience in delivering similar scopes of work. The expected salary for jobs directly created by the Project will range from £40,000 to £120,000, three times the average pay in Aberdeenshire (NOMIS, 2023).

16.10.25 Table 16.19 provides the baseline conditions for GVA and employment for the North East, Scotland and UK economies and labour market. Table 16.25 and Table 16.26 present the estimated direct, indirect, and induced effects for GVA and employment under each scenario. GVA impacts are presented in real, undiscounted terms (2025 prices).

Table 16.25: Scenario 1 Operation Outputs

Operation Scenario 1			
	North East	**Scotland**	**UK**
Direct GVA	£315mln	£899mln	£899mln
Indirect GVA	£115mln	£328mln	£328mln
Induced GVA	£87mln	£249mln	£249mln
Total GVA	**£517mln**	**£1,476mln**	**£1,475mln**
Direct annual. Employment	3,221 aFTEs	9,202 aFTEs	9,202 aFTEs
Indirect annual. Employment	1,798 aFTEs	5,137 aFTEs	5,137 aFTEs
Induced annual. Employment	1,191 aFTEs	3,403 aFTEs	3,403 aFTEs
Total Annualised Employment	**6,210 aFTEs**	**17,743 aFTEs**	**17,743 aFTEs**
Direct Employment	107 FTEs	307 FTEs	307 FTEs
Indirect Employment	60 FTEs	171 FTEs	171 FTEs
Induced Employment	40 FTEs	113 FTEs	113 FTEs
Total Employment	**207 FTEs**	**591 FTEs**	**591 FTEs**

16.10.26 Scenario 1 OPEX project expenditure would be expected to result in a total GVA impact of:

- £517 million in the North East, a 2.48% increase on the baseline total of £20.9bn GVA in the North East, considered a High magnitude of change.
- £1,476 million in Scotland, a 0.80% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Medium magnitude of change.
- £1,475 million in the UK, a 0.6% increase on the baseline total of £2,601.6 billion GVA in the UK, considered a Negligible magnitude of change.

16.10.27 Scenario 1 OPEX project expenditure would be expected to result in a total Employment impact of:

- 6,210 aFTEs, equivalent to 207 FTEs, in the North East, a 0.21% increase on the baseline total of 99,725 FTEs in the North East, considered a Low magnitude of change.
- 17,743 aFTEs in Scotland, equivalent to 591 FTEs, a 0.06% increase on the baseline total of 1.02mln FTEs in Scotland, considered a Negligible magnitude of change.
- 17,743 aFTEs in the UK, equivalent to 591 FTEs, a 0.00% increase on the baseline total of 14.67mln FTEs in the UK, considered a Negligible magnitude of change.

Table 16.26: Scenario 2 Operation Outputs

Operation Scenario 2			
	North East	**Scotland**	**UK**
Direct GVA	£450mln	£899mln	£955mln
Indirect GVA	£164mln	£328mln	£400mln
Induced GVA	£124mln	£249mln	£284mln
Total GVA	**£738mln**	**£1,476mln**	**£1,639mln**
Direct annual. Employment	4,601 aFTEs	9,202 aFTEs	9,989 aFTEs
Indirect annual. Employment	2,569 aFTEs	5,137 aFTEs	7,076 aFTEs
Induced annual. Employment	1,702 aFTEs	3,402 aFTEs	4,222 aFTEs
Total Annualised Employment	**8,872 aFTEs**	**17,743 aFTEs**	**21,287 aFTEs**
Direct Employment	153 FTEs	307 FTEs	333 FTEs
Indirect Employment	86 FTEs	171 FTEs	236 FTEs
Induced Employment	57 FTEs	113 FTEs	141 FTEs
Total Employment	**296 FTEs**	**591 FTEs**	**710 FTEs**

16.10.28 Scenario 2 OPEX project expenditure would be expected to result in a total GVA impact of:

- £738 million in the North East, a 3.54% increase on the baseline total of £20.9 billion GVA in the North East, considered a High magnitude of change.
- £1.48 billion in Scotland, a 0.80% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Medium magnitude of change.
- £1.64 billion 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.

16.10.29 Scenario 2 OPEX project expenditure would be expected to result in a total Employment impact of:

- 8,872 aFTEs, equivalent to 296 FTEs, in the North East, a 0.30% increase on the baseline total of 99,725 FTEs in the North East, considered a Low magnitude of change.
- 17,743 aFTEs in Scotland, equivalent to 591 FTEs, a 0.06% increase on the baseline total of 1.02 million FTEs in Scotland, considered a Negligible magnitude of change.
- 21,287 aFTEs in the UK, equivalent to 710 FTEs, a 0.00% increase on the baseline total of 14.67 million FTEs in the UK, considered a Negligible magnitude of change.

Sensitivity of Receptor

16.10.30 The identified receptors (regional, Scottish, UK-wide economies and labour markets) align closely with key policy priorities at both the local level and across Scotland and the wider UK. Assigned sensitivity and these receptors is provided in Table 16.22.

Significance of Effect

16.10.31 Table 16.27 presents a summary of the combined magnitude of change and sensitivity of the receptors. The consequence of these elements is defined using

Table 16.13 Matrix Used for the Assessment of the Significance of the Effect. No mitigation is considered necessary because the likely effect in the absence of mitigation is not significant in EIA terms.

Table 16.27: Significance – Operation

Operation	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
North East					
Scenario 1	GVA	High	High	Major (Beneficial)	Significant (Beneficial)
	FTE	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scenario 2	GVA	High	High	Major (Beneficial)	Significant (Beneficial)
	FTE	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scotland					
Scenario 1	GVA	Medium	Medium	Moderate (Beneficial)	Significant (Beneficial)
	FTE	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2	GVA	Medium	Medium	Moderate (Beneficial)	Significant (Beneficial)
	FTE	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTE	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTE	Negligible	Medium	Negligible (Beneficial)	Not Significant

Changes to Tourism and Recreation Receptors

Magnitude of Impact

16.10.32 Volume 1, Chapter 8: Landscape and Visual reports that during the O&M phase, the visibility of the substation would be mostly limited to these Fetteresso Forest path networks which lie within 1 km of the Proposed Development. There would be no visibility to the Proposed Development from the majority of local paths within the forest, including Fetteresso Forest Circular path. At WYO, the earthworks and felled areas surrounding the Substation following the construction phase would be clearly noticeable within the forest, resulting in a Moderate residual effect. As mitigation planting establishes, these impacts would merge into the overall landscape and by SY12 would not be apparent, and a Minor residual effect would remain.

16.10.33 Volume 1, Chapter 8: Landscape and Visual reports Major residual adverse effect for walkers in Fetteresso Forest at Hill of Swanley (Viewpoint 6) in WYO, reducing to Moderate adverse by SY12. The substation would form a major element and focal point in views from this location, extending across a wide angle of view and introducing large-scale built form into the existing forested landscape. Path users would look down onto the substation roof which would be seen centrally in front of the Hill of Trusta 740m away. At WYO the earthworks and felled areas surrounding the substation following the construction phase would be clearly noticeable. As mitigation planting establishes these impacts would merge into the overall landscape and by SY12 would not be apparent.

16.10.34 The operation and maintenance phase was scoped out of the assessment on public access in Volume 1, Chapter 6: Land Use, Agriculture and Public Access. As there are no significant residual effects reported during operation and maintenance for Volume 1, Chapter 12: Air Quality, and Volume 1, Chapter 13: Noise and Vibration, and Volume 1, Chapter 10: Traffic and Transport an in-combination amenity impact is not expected for tourism and recreational receptors. No change to visitor behaviour is expected to arise as result.

16.10.35 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.

16.10.36 The Scottish Government (2022) survey reported that only 5% of residents of Scotland said that they had ever deliberately avoided visiting an area where they knew that offshore WTGs 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. Four out of five national respondents (80%) say being able to view turbines from an offshore wind farm while on holiday in Scotland would make no difference to their choice of holiday, while 4% would be more likely to choose the holiday if they could see turbines. Around one in ten (11%) of national respondents would be less likely to choose the holiday because they could see turbines from an offshore wind farm (Scottish Government, 2022). It is noted that the research did not extend to other parts of the UK or international visitors, however it is considered

unlikely that the trend in responses would be markedly different for these other geographical areas.

16.10.37 It is noted that the Scottish Government (2022) research is more pertinent to the offshore elements of the Proposed Development in relation to the visual presence of the turbines and whether this can have positive or negative impacts on the attraction of that location for tourists and is less relevant to the assessment of the onshore elements. However, the findings of these studies illustrate that public perceptions of windfarms generally do not have a negative impact on tourism and recreation in Scotland.

16.10.38 The magnitude of impact on tourism and recreation during operation is therefore considered to be Negligible.

Sensitivity of Receptor

16.10.39 As for construction, sensitivity of the regional tourism economy is assigned as Low.

Significance of the Effect

16.10.40 Overall, 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 to Minor significance, which is not significant in EIA terms. Considering that visual impacts are the only significant residual effects reported from the other environmental topics, there is a low likelihood of an in-combination amenity impact occurring, therefore the lower significance rating of **Negligible** is deemed the most likely effect.

Socio-cultural Impacts

Magnitude of Impact

16.10.41 During the O&M phase, it is anticipated that with the demobilisation of the construction workforce and activities, any residual impacts on local residents and essential services are expected to be minimal. Employment generated during this phase will primarily relate to routine repairs and maintenance of the cable and substation infrastructure over its operational lifespan. This local employment may contribute positively to quality of life and community wellbeing by supporting economic stability, developing local skills and therefore improving community resilience. Additionally, improvements to recreational routes implemented as part of the construction phase mitigation measures (to be agreed with stakeholders) should result in a benefit for local communities. The overall magnitude of impact on the socio-cultural character of local communities during construction is considered to be Negligible beneficial.

Sensitivity of Receptor

16.10.42 As for construction, local communities are assigned a High sensitivity.

Significance of the Effect

16.10.43 Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be High. The effect will therefore be of **Minor** beneficial significance, which is not significant in EIA terms.

Decommissioning Phase

Impact on GVA, Employment and Supply Chain

Magnitude of Impact

16.10.44 In general, the scale and type of effects expected during the decommissioning stage could be expected to be similar to those anticipated to occur during the construction stage. The economic impact has been assessed across direct, indirect, and induced effects for GVA and Employment for two scenarios, with outputs presented in Table 16.28 and Table 16.29. GVA impacts are presented in real, undiscounted terms (2025 prices).

Table 16.28: Scenario 1 Decommissioning Outputs

Decommissioning Scenario 1			
	North East	**Scotland**	**UK**
Direct GVA	£8mln	£22mln	£61mln
Indirect GVA	£3mln	£10mln	£45mln
Induced GVA	£2mln	£6mln	£26mln
Total GVA	**£13mln**	**£38mln**	**£132mln**
Direct annual. Employment	59 aFTEs	167 aFTEs	804 aFTEs
Indirect annual. Employment	38 aFTEs	108 aFTEs	834 aFTEs
Induced annual. Employment	23 aFTEs	66 aFTEs	423 aFTEs
Total Annualised Employment	**120 aFTEs**	**342 aFTEs**	**2,061 aFTEs**
Direct Employment	29 FTEs	84 FTEs	402 FTEs
Indirect Employment	19 FTEs	54 FTEs	417 FTEs
Induced Employment	12 FTEs	33 FTEs	212 FTEs
Total Employment	**60 FTEs**	**171 FTEs**	**1,031 FTEs**

16.10.45 Scenario 1 DECEX project expenditure would be expected to result in a total GVA impact of:

- £13 million in the North East, a 0.06% increase on the baseline total of £20.9bn GVA in the North East, considered a Negligible magnitude of change.
- £38 million in Scotland, a 0.02% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Negligible magnitude of change.
- £132 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.

16.10.46 Scenario 1 DECEX project expenditure would be expected to result in a total Employment impact of:

- 120 aFTEs, equivalent to 60 FTEs, in the North East, a 0.06% increase on the baseline total of 99,725 FTEs in the North East, considered a Negligible magnitude of change.
- 342 aFTEs in Scotland, equivalent to 171 FTEs, a 0.02% increase on the baseline total of 1.02 million FTEs in Scotland, considered a Negligible magnitude of change.
- 2,061 aFTEs in the UK, equivalent to 1,031 FTEs, a 0.00% increase on the baseline total of 14.67 million FTEs in the UK, considered a Negligible magnitude of change.

Table 16.29: Scenario 2 Decommissioning Outputs

Decommissioning Scenario 2			
	North East	**Scotland**	**UK**
Direct GVA	£30mln	£59mln	£119mln
Indirect GVA	£13mln	£27mln	£80mln
Induced GVA	£8mln	£17mln	£47mln
Total GVA	**£51mln**	**£102mln**	**£247mln**
Direct annual. Employment	226 aFTEs	453 aFTEs	1,425 aFTEs
Indirect annual. Employment	147 aFTEs	293 aFTEs	1,402 aFTEs
Induced annual. Employment	89 aFTEs	179 aFTEs	725 aFTEs
Total Annualised Employment	**462 aFTEs**	**925 aFTEs**	**3,553 aFTEs**
Direct Employment	113 FTEs	226 FTEs	713 FTEs
Indirect Employment	73 FTEs	147 FTEs	701 FTEs
Induced Employment	45 FTEs	89 FTEs	362 FTEs
Total Annualised Employment	**231 FTEs**	**462 FTEs**	**1,776 FTEs**

16.10.47 Scenario 2 DECEX project expenditure would be expected to result in a total GVA impact of:

- £51 million in the North East, a 0.25% increase on the baseline total of £20.9bn GVA in the North East, considered a Low magnitude of change.
- £102 million in Scotland, a 0.06% increase on the baseline total of £183.5 billion GVA in Scotland, considered a Negligible magnitude of change.
- £247 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.

16.10.48 Scenario 2 DECEX project expenditure would be expected to result in a total Employment impact of:

- 426 aFTEs, equivalent to 231 FTEs, in the North East, a 0.23% increase on the baseline total of 99,725 FTEs in the North East, considered a Low magnitude of change.
- 925 aFTEs in Scotland, equivalent to 462 FTEs, a 0.05% increase on the baseline total of 1.02 million FTEs in Scotland, considered a Negligible magnitude of change.
- 3,553 aFTEs in the UK, equivalent to 1,776 FTEs, a 0.01% increase on the baseline total of 14.67 million FTEs in the UK, considered a Negligible magnitude of change.

Sensitivity of Receptor

16.10.49 The identified receptors (regional, Scottish, UK-wide economies and labour markets) align closely with key policy priorities at both the local level and across Scotland and the wider UK. Assigned sensitivity and these receptors is provided in Table 16.22.

Significance of Effect

16.10.50 Table 16.30: Significance - Decommissioning, presents a summary of the combined magnitude of change and sensitivity of the receptors. The consequence of these elements is defined using Table 16.13 Matrix Used for the

Assessment of the Significance of the Effect. No mitigation is considered necessary because the likely effect in the absence of mitigation is not significant in EIA terms.

Table 16.30: Significance - Decommissioning

Decommissioning	Receptor	Magnitude of Impact	Sensitivity	Consequence	Significance
North East					
Scenario 1	GVA	Low	High	Moderate (Beneficial)	Significant (Beneficial)
	aFTE	Negligible	High	Minor (Beneficial)	Not Significant (Beneficial)
Scenario 2	GVA	Low	High	Moderate (Beneficial)	Significant (Beneficial)
	aFTE	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scotland					
Scenario 1	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	aFTE	Negligible	Medium	Negligible (Beneficial)	Not Significant

Impacts on other Socio-Economic, Tourism and Recreation Sub-Topics

16.10.51 Table 16.31 presents the anticipated effects of decommissioning for the other Socio-Economic, Tourism and Recreation sub-topics. Socio-cultural impacts were scoped out of this assessment phase.

Table 16.31: Socio-Economic, Tourism and Recreation Effects (excluding GVA and employment) - Decommissioning

Subtopic	Significance of Effect
Changes to demographics	During decommissioning there is anticipated to be a smaller workforce required, and for a shorter duration than for the construction phase. It is expected that the magnitude of impact would be Negligible. Aberdeenshire's population is predicted to grow more quickly than elsewhere in Scotland up 2028. As is the trend nationally, there is a growing aging population. Nonetheless, in terms of size, 45 to 65 is projected to remain as the largest age group. In Aberdeen City, between 2018 and 2028, the population is projected to increase by 1.1% from 227,560 to 230,170, lower than the 1.8% projected rise for Scotland. Sensitivity remains as Medium. Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Medium. The effect will therefore be of Negligible to Minor beneficial significance, which is not significant in EIA terms. Considering the proportion of the temporary decommissioning workforce would be very low in comparison to the overall population in the TTWA, the lower significance rating of **Negligible** is deemed the most likely effect. No mitigation is required.
Changes to demand for housing and other services	During decommissioning there is anticipated to be a smaller workforce required, and for a shorter duration than for the construction phase. It is expected that the magnitude of impact would be Negligible. As net migration to Aberdeenshire is expected to increase in the coming decades and the population is predicted to grow more quickly than elsewhere in Scotland, this could place additional pressure on housing demand and other services. However, it is expected that existing and future policies and strategies will be implemented to address these challenges. New housing developments planned in Drumlithie and Laurencekirk, and in the wider Aberdeenshire council area, are likely to support the provision and expansion of additional capacity within local schools and medical centres and the improvement of local infrastructure, including transport, roads, and sport and recreational facilities. The sensitivity of accommodation stock at the time of decommissioning is anticipated to be Medium while the sensitivity of local services is anticipated to remain as High.

Subtopic	Significance of Effect
	Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Medium/High (accommodation stock/local services). The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms. No mitigation is required.
Changes to amenity of local public & private receptors	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. There may be a change in the future baseline in relation to the presence of individual private and public receptors identified in this assessment, however it is considered that this would not differ considerably from the existing situation as to result in a material change to assessment conclusions. Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptors are considered to be High. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms. No mitigation is required.
Changes to tourism and recreational receptors	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. The Aberdeenshire and Aberdeen City tourism economy is resilient and strategies are in place to ensure sustainable future growth in the sector. Overall, 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 to Minor adverse significance, which is not significant in EIA terms. Considering that the high likelihood that there will be a perceptible change in amenity for users of recreational receptors during decommissioning - albeit temporarily and appropriately managed by mitigation measures - the higher significance rating of **Minor** is deemed the most likely effect.

16.11 Inter-Related Effects

16.11.1 The Socio-Economic, Tourism and Recreation assessment – specifically, the assessment of changes to amenity of public and private receptors and changes to tourism and recreation receptors – is a secondary assessment that is reliant on the conclusions of the following EIA chapters:

- Volume 1, Chapter 6: Land Use, Agriculture and Public Access;
- Volume 1, Chapter 8: Landscape and Visual; and
- Volume 1, Chapter 12: Air Quality;

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

16.11.2 Thus, the assessment presented in this chapter inherently considers the combined, inter-related effects between these topics. Conclusions of the Inter-Related Effects assessments have been checked against the findings of this chapter. As a result, further assessment of inter-related effects for Socio-Economic, Tourism and Recreation was not considered necessary.

16.12 Cumulative Effects Assessment

Methodology

16.12.1 The Cumulative Effects Assessment (CEA) assesses the impact associated with the Proposed Development together with other relevant projects and activities. Cumulative effects are defined as the effect of the Proposed Development in combination with the effects from a number of different projects, on the same receptor or resource. Further details on CEA methodology are provided in Volume 1, Chapter 3: Environmental Impact Assessment Methodology.

16.12.2 The projects selected as relevant to the CEA presented within this chapter are based upon the results of a screening exercise of the long list of Cumulative Projects included in Table 3.9 within Volume 1, Chapter 3: EIA Methodology. Full details on CEA methodology are provided in Volume 1, Chapter 3: EIA Methodology where further information is provided in relation to the other projects and how this information is obtained and applied to the assessment. Each project has been considered on a case-by-case basis for screening in or out of this chapter's assessment based upon data confidence, effect-receptor pathways and the spatial/temporal scales involved.

16.12.3 The specific projects scoped into the CEA for Socio-Economics, Tourism and Recreation, are outlined in Table 16.32.

Table 16.32: Screening of Other Projects for Consideration within the CEA for Socio-Economics, Tourism and Recreation

Project	Overlap with the Proposed Development	Screened into CEA (Yes/No)
Tier 2		
Hurlie 400 kV Substation APP/2024/1951, ENQ/2024/1176, ENQ/2024/0146	Project Operational Phase Overlaps with Proposed Development Construction Phase. Unlikely to be any significant cumulative impacts from a traffic and transportation perspective, however, a combined cumulative visual effect is predicted at several locations. There could also be potential construction and operational noise impacts on receptors that are in proximity to the Substation as well as the Proposed Developed.	Yes
Grains Of Fetteresso Indoor Play Area APP/2025/0058	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
The Waters BESS ENQ/2024/1615, ENQ/2024/1830	Relevant environmental effects assessments reviewed - no overlap anticipated.	No

Project	Overlap with the Proposed Development	Screened into CEA (Yes/No)
Fetteresso 132 kV Substation Upgrade ENQ/2025/1103, ENQ/2025/1000	Potential for construction to take place at the same time as the Proposed Development construction phase, resulting in combined construction noise impacts. Potential for operational noise impacts to affect nearby residential receptors at the same time.	Yes
S36 Windfarm, Fetteresso Forest, ECU00001851, APP/2019/1341	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Glenskinnan Renewable Energy Park ENQ/2025/0960	Project Construction Phase Overlaps with Proposed Development Construction Phase.	Yes
Craigneil Wind Farm ENQ/2024/0640	Combined cumulative visual effect is predicted at several locations during operation and maintenance phase.	Yes
Meetlaw Farm Battery Energy Storage System, APP/2022/2676	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
East Coast Viners Solar Storage Project APP/2022/1701	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Tier 3		
Tealing to Kintore 400 kV OHL ENQ/2024/1397, ECU00005225	Project Operational Phase Overlaps with Proposed Development Construction Phase. Unlikely to be any significant cumulative impacts from a traffic and transportation perspective, however, a combined cumulative visual effect is predicted at several locations.	Yes
Droop Hill Solar Park ENQ/2025/0368, APP/2025/0560	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Glendye Wind Farm 132 kV OHL ENQ/2024/1818, ECU0005197	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Bridgend Farm BESS ENQ/2024/0747, APP/2025/0089	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Quithel 50 MW BESS ENQ/2023/1713	Relevant environmental effects assessments reviewed - no overlap anticipated.	No
Northeast Of Drumlithie BESS ENQ/2023/0093	Relevant environmental effects assessments reviewed - no overlap anticipated.	No

Maximum Design Scenario

16.12.4 The MDS identified in Table 16.33 have been selected as those having the potential to result in the greatest effect on an identified receptor or receptor group. The cumulative effects presented and assessed in this section have been selected from the details provided in Volume 1, Chapter 2: The Proposed Development as well as the information available on other projects to inform a 'maximum design scenario'. Any other development scenario within the Project

Design Envelope (PDE), will result in in the same, or less, level of environmental effect.

Table 16.33: Maximum Design Scenario Considered for Each Impact as part of the Assessment of Likely Significant Cumulative Effects on Socio-Economics, Tourism and Recreation

Potential Cumulative Effect	Phase*			Tier and Project	Maximum Design Scenario
	C	O&M	D		
Impact on GVA and employment	✓	✓	✓	2 & 3 - Tealing to Kintore 400 kV OHL (C, O+M, D), Hurlie 400 kV Substation (C, O+M, D), Fetteresso 132 kV Substation Upgrade (C, O+M, D) Glendye Wind Farm 132 kV OHL (O), The Waters BESS (O), Bridgend Farm BESS (O), Quithel 50 MW BESS (O), Northeast Of Drumlithie BESS (O), East Coast Viners Solar Storage Project (O), Droop Hill Solar Park (O), Glenskinnan Renewable Energy Park (O), Kernoon Steading Turbines (O), Craigneil Wind Farm (O)	**Construction** Overlapping construction phases of multiple developments requiring similar materials and expertise could have impacts on supply chain, due to competition for available resources and labour pool. A shortage of available supply capacity could result in regional/Scottish content for the Proposed Development having to be sourced from elsewhere. Conversely, the pipeline of energy developments provided an opportunity for further development and investment in the supply chain relevant to the Proposed Development. **Operation and Maintenance** MDS for O&M would be similar to that for construction, but related to supply chain demand arising from O&M activities. **Decommissioning** MDS for decommissioning would be similar to that for construction.
Change in demographics	✓	×	✓	2 & 3 - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV	**Construction** Overlapping construction phases of multiple developments requiring a temporary construction

Potential Cumulative Effect	Phase*			Tier and Project	Maximum Design Scenario
	C	O&M	D		
				Substation Upgrade	workforce could result in a combined impact on the demographics of the local area. **Decommissioning** MDS for decommissioning would be similar to that for construction.
Change in demand for housing and other services	✓	×	✓	2 & 3 - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation Upgrade	**Construction** Overlapping construction phases of multiple developments requiring a temporary construction workforce could result an increase in demand for housing and other services in the local area. **Decommissioning** MDS for decommissioning would be similar to that for construction.
Change in amenity of local public and private services	✓	×	✓	2 & 3 - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation Upgrade	**Construction** Overlapping construction phases could result in environmental effects on visual; noise and vibration; public access; and traffic and transport from multiple developments resulting in amenity effects on local public and private receptors. **Decommissioning** MDS for decommissioning would be similar to that for construction, but to a lesser extent.
Change in tourism and recreation receptors	✓	✓	✓	2 & 3 - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation Upgrade, Glenskinnan Renewable Energy Park,	**Construction** Overlapping construction phases could result in environmental effects on visual; noise and vibration; public access; and traffic and transport from multiple developments

Potential Cumulative Effect	Phase*			Tier and Project	Maximum Design Scenario
	C	O&M	D		
				Craigneil Wind Farm	resulting in amenity effects on tourism and recreation receptors. In turn, this could affect visitor behaviour and the tourism economy. **Operation and Maintenance** MDS for O&M would be similar to that for construction, in relation to O&M activities. **Decommissioning** MDS for decommissioning would be similar to that for construction.
Socio-cultural impacts	✓	✓	×	2 & 3 - Grains Of Fetteresso Indoor Play Area, Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Glendye Wind Farm 132 kV OHL, The Waters BESS, Bridgend Farm BESS, Quithel 50 MW BESS, Northeast Of Drumlithie BESS East Coast Viners Solar Storage Project, Fetteresso 132 kV Substation Upgrade, Droop Hill Solar Park, Glenskinnan Renewable Energy Park, Kernoon Steading Turbines, Craigneil Wind Farm	**Construction** Multiple developments under construction at the same time in the local area could increase the presence of a transient workforce, cause greater disruption to journeys, local facilities and recreational areas, and have a greater impact on community values and wellbeing, than the Proposed Development in isolation. Communities may feel excluded, un-empowered or that they do not have an influence over the planning and decision-making process. There could also be a greater positive impact on quality of life should employment opportunities from other planned developments result in people in the local area gaining access to quality jobs.

Potential Cumulative Effect	Phase*			Tier and Project	Maximum Design Scenario
	C	O&M	D		
					Operation and Maintenance MDS for O&M would be similar to that for construction.

* Project Phase refers to construction (C), operation and maintenance (O) and decommissioning (D).

Cumulative Effects Assessment

16.12.5 An assessment of the likely significance of the cumulative effects of the Proposed Development upon Socio-Economic, Tourism and Recreation receptors arising from each identified impact is given below.

Impact on GVA and Employment

Construction Phase

16.12.6 Developments in Table 16.32 which are considered relevant to the cumulative assessment of impacts on GVA and employment are those relating to onshore windfarms; OHLs; energy infrastructure (substations and storage) including the Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, and Fetteresso 132 kV Substation Upgrade. If construction of the Project overlaps with the construction phase of these other developments requiring similar materials and expertise, this could impact local supply chain and labour capacity. This could result in regional/Scottish content for the Project having to be sourced from elsewhere, meaning the estimated employment and GVA impacts for the Proposed Development may not be realised in full.

16.12.7 Conversely, the pipeline of energy developments could provide an opportunity for further development and investment in the supply chain relevant to the Project. This could encourage additional private investment in growing the supply chain capacity, such as in new production facilities and equipment and in workforce recruitment and upskilling. There are further opportunities in relation to repurposing technologies, materials and skills related to the declining O&G sector that could be utilised for renewable energy and transmission infrastructure. This could be particularly relevant in relation to potential workforce capacity constraints and skills shortages. An example of this at the local level could be TWP collaborating with developers of the aforementioned projects to identify potential challenges and opportunities related to skills and employment for the respective projects.

16.12.8 The offshore wind sector is noted in Scottish Government policies such as the Draft Energy Strategy and Just Transition Plan and Scotland's National Strategy for Economic Transformation as being crucial in the development of Scotland's renewables supply chain, and in replacing jobs that will be lost as the O&G sector in the North East declines. TWP has outlined commitments to increase capacity in the Scottish supply chain in the Bowdun Offshore Windfarm SCDS and already has a proven track record in successful engagement with businesses, with £5 million Bowdun Offshore Wind Farm supply chain spend in Scotland to date. The Bowdun Offshore Windfarm SCDS will be refreshed in the

coming months, and will be cognisant of the energy project landscape in relation to potential supply chain constraints and opportunities.

16.12.9 Due to the uncertainties related to timings as well as supply chain and procurement requirements for the other relevant developments listed in Table 16.32, it is not possible to undertake a quantitative assessment of cumulative effects for GVA and employment. It is considered that on balance, any reduction in benefits for GVA and employment from the Project arising from supply chain competition is likely to be offset by the increasing supply chain capacity in the renewables sector that the Scottish Government, TWP and other private investors are committed to.

16.12.10 Overall, it is considered that whilst that there could be cumulative effects, this would not change the overarching conclusions as to overall significance in EIA terms. Therefore, for the 'Commitments' scenario the significance of effects would remain Moderate (beneficial) for GVA and Moderate (beneficial) for employment.

Operation and Maintenance

16.12.11 During operation and maintenance, 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.

16.12.12 Overall, it is considered that whilst that there could be cumulative effects, this would not change the overarching conclusions as to overall significance in EIA terms. Therefore, for the 'Commitments' scenario the significance of effects would remain Major (beneficial) for GVA and Moderate (beneficial) for employment.

Decommissioning

16.12.13 There is limited information currently available in relation to timescales for decommissioning of projects in Table 16.32. However, should decommissioning of other developments occur at the same time as the Project, impacts related to increased supply chain demand would be similar as those identified for the construction phase.

16.12.14 Overall, it is considered that whilst that there could be cumulative effects, this would not change the overarching conclusions as to overall significance in EIA terms. Therefore, for the 'Commitments' scenario the significance of effects would remain Moderate (beneficial) for GVA and Minor (beneficial) for employment.

Changes to Demographics

Construction

16.12.15 Overlapping construction phases of multiple developments requiring a temporary construction workforce could result in a cumulative effect on the demographics of the local area. Due to the uncertainties related to timings as

well as construction workforce requirements for the other relevant developments listed in Table 16.32, it is not possible to undertake a detailed assessment of cumulative effects for demographics. However, it is noted that the developments with overlapping construction phases - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation Upgrade – are relatively close to the Proposed Development (within 1.5km). The construction workforce required for these developments would therefore be likely to reside in the same TTWA.

16.12.16 It is considered that the construction workforce for Proposed Development and the three additional developments combined are likely to comprise a relatively small increase to the population in the overall TTWA.

16.12.17 There could be greater positive cumulative effect on demographics than the Proposed Development in isolation arising from an influx of working age people to the local and regional area for construction of the projects, offsetting the trend in outward migration.

16.12.18 Overall, the magnitude of the impact is deemed to be Low and the sensitivity of the receptor is considered to be Medium. The effect will therefore be of **Minor** beneficial significance, which is not significant in EIA terms.

Decommissioning

16.12.19 There is limited information currently available in relation to timescales for decommissioning of projects in Table 16.32. However, should decommissioning of other developments occur at the same time as the Proposed Development, similar impacts related to changes in demographics would be similar as those identified for the construction phases.

16.12.20 Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Low/Medium. The effect will therefore be of Negligible to Minor beneficial significance, which is not significant in EIA terms. Considering the proportion of the temporary construction workforce for the Proposed Development and other developments is anticipated to be low in comparison to the overall population in the TTWA, the lower significance rating of **Negligible** is deemed the most likely effect.

Changes to Housing and Other Services

Construction

16.12.21 Overlapping construction phases of multiple developments requiring a temporary construction workforce could result in a cumulative effect on the demographics of the local area, which could in turn result in increased demand for housing and other services. Due to the uncertainties related to timings as well as construction workforce requirements for the other relevant developments listed in Table 16.32, it is not possible to undertake a detailed assessment of cumulative effects for demand on housing and other services. However, it is noted that the developments with overlapping construction phases - Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation Upgrade – are relatively close to the Proposed Development

(within 1.5km) and would therefore be likely to require accommodation within the same TTWA.

16.12.22 The assessment of changes to housing and other services for the Proposed Development indicated that there is ample capacity in the private rental sector and tourist accommodation stock within Aberdeen City and Aberdeenshire. However, capacity issues for some educational establishments and emergency services were noted. As with the Proposed Development, it is considered unlikely that the average worker would relocate with a family and therefore would place lesser demand on local services.

16.12.23 An Accommodation Strategy has been committed to for the Proposed Development, which would include undertaking engagement with other businesses planning to build infrastructure in the same area (e.g. SSENT). It is also assumed that where required, an Accommodation Strategy would be implemented by other developers which would involve outlining expectations for accommodating workers and undertaking appropriate engagement.

16.12.24 Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Low/High (accommodation stock/local services). The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Decommissioning

16.12.25 There is limited information currently available in relation to timescales for decommissioning of projects in Table 16.32. However, should decommissioning of other developments occur at the same time as the Proposed Development, similar impacts related to changes in housing and other services would be similar as those identified for the construction phases.

16.12.26 Overall, the magnitude of the impact is deemed to be Negligible and the sensitivity of the receptor is considered to be Low/High (accommodation stock/local services). The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Changes to Amenity of Local Public and Private Services

Construction

16.12.27 Overlapping construction phases could result in environmental effects on visual; noise and vibration; public access; and traffic and transport from multiple developments resulting in amenity effects on local public and private receptors. Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation and Fetteresso 132 kV Substation Upgrade have been identified as having construction phases that could overlap with the Proposed Development.

16.12.28 Construction phase effects have been scoped out of the cumulative effects assessment in Volume 1, Chapter 8: Landscape and Visual due to uncertainty regarding the timing of the construction phase of the other, third-party future developments. Volume 1, Chapter 6: Land Use, Agriculture and Public Access, Volume 1, Chapter 12: Air Quality and Volume 1, Chapter 14: Traffic and Transport identified no significant cumulative effects arising from the other developments. Volume 1, Chapter 13: Noise and Vibration identified Hurlie 400

kV Substation as having the potential for cumulative noise and vibration effects in relation to construction works; however, as noise levels for both developments would remain below the 65dB maximum construction noise trigger, no significant cumulative effect is anticipated.

16.12.29 Overall, the magnitude of the impact is deemed to be Low and the sensitivity of the receptors are considered to be High. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Decommissioning

16.12.30 There is limited information currently available in relation to timescales for decommissioning of projects in Table 16.32. However, should decommissioning of other developments occur at the same time as the Proposed Development, similar impacts related to changes in amenity for local public and private services would be similar as those identified for the construction phases.

16.12.31 Overall, the magnitude of the impact is deemed to be Low and the sensitivity of the receptors are considered to be High. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Changes to Tourism and Recreation Receptors

Construction

16.12.32 Overlapping construction phases could result in environmental effects on visual; noise and vibration; public access; and traffic and transport from multiple developments resulting in amenity effects on tourism and recreation receptors. In turn, this could affect visitor behaviour and the tourism economy. Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation and Fetteresso 132 kV Substation Upgrade have been identified as having construction phases that could overlap with the Proposed Development.

16.12.33 Construction phase effects have been scoped out of the cumulative effects assessment in Volume 1, Chapter 8: Landscape and Visual due to uncertainty regarding the timing of the construction phase of the other, third-party future developments. Volume 1, Chapter 6: Land Use, Agriculture and Public Access, Volume 1, Chapter 12: Air Quality and Volume 1, Chapter 14: Traffic and Transport identified no significant cumulative effects arising from the other developments. Volume 1, Chapter 13: Noise and Vibration identified Hurlie 400 kV Substation as having the potential for cumulative noise and vibration effects in relation to construction works and traffic; however, as noise levels for both developments would remain below the 65dB maximum construction noise trigger, no significant cumulative effect is anticipated.

16.12.34 Relevant stakeholders, including local authorities, statutory bodies and recreational groups, will be kept informed of construction activities through implementation of the Community Engagement Strategy as part of the CEMP for the Proposed Development. It is considered likely that the other developments identified will have similar provisions included as part of their respective CEMPs.

16.12.35 Overall, the magnitude of the impact is deemed to be Medium and the sensitivity of the receptor is considered to be Low. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Operation and Maintenance

16.12.36 During operation and maintenance, cumulative impacts on tourism and recreation receptors could arise as a result of visual and noise and vibration effects. Volume 1, Chapter 8: Landscape and Visual reports significant cumulative visual effects arising from Tealing to Kintore 400 kV OHL, Hurlie 400 kV Substation, Fetteresso 132 kV Substation, Glenskinnan Renewable Energy Park, Craigneil Windfarm and the Proposed Development which would impact on people travelling on sections of path within Fetteresso Forest.

16.12.37 Craigneil Windfarm is an onshore wind development and Glenskinnan Renewable Energy Park includes a windfarm comprising up to 14 turbines and a co-located BESS. There are many studies on the impacts of onshore windfarms on tourism in the UK. As with offshore wind developments, studies have shown that onshore windfarms are very unlikely to have any adverse impact on tourist numbers, expenditure or experience (Glasson, Durning and Welch, 2021). Additionally, the Socio-Economic Assessment of the Hurlie (Fetteresso) Substation (Biggar Economics, 2024) identified no significant impacts on tourism assets and recreational amenities arising from the Hurlie 400 kV Substation project.

16.12.38 While the research shows that one development in isolation would not have an adverse effect on tourism and recreation, due to the extent of development in the area it is considered that there may be a cumulative effect impact for tourists and recreational users of paths within Fetteresso Forest Recreational Area. No significant cumulative effects are anticipated for other tourism and recreational receptors.

16.12.39 Overall, the magnitude of the impact is deemed to be Medium and the sensitivity of the receptor is considered to be Low. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Decommissioning

16.12.40 There is limited information currently available in relation to timescales for decommissioning of projects in Table 16.32. However, should decommissioning of other developments occur at the same time as the Proposed Development, cumulative effects related to tourism and recreation.

16.12.41 Overall, the magnitude of the impact is deemed to be Medium and the sensitivity of the receptor is considered to be Low. The effect will therefore be of **Minor** adverse significance, which is not significant in EIA terms.

Socio-cultural Impacts

Construction

16.12.42 Multiple developments under construction at the same time in the local area could increase the presence of a transient workforce, cause greater disruption to journeys, local facilities and recreational areas, and have a greater impact on

community values and wellbeing, than the Proposed Development in isolation. Communities may feel excluded, disempowered or that they do not have an influence over the planning and decision-making process.

16.12.43 Construction activities associated with multiple developments could have a greater impact on local community wellbeing than the Proposed Development in isolation. This is considered particularly relevant for community enjoyment of Fetteresso Forest Recreational Area, where the Proposed Development, Hurlie 400 kV Substation and Fetteresso 132 kV Substation Upgrade would be located. It is assumed that in accordance with best practice, construction works across the projects would be phased appropriately so as to minimise disruption to users of this recreational area.

16.12.44 The Community Engagement Strategy implemented as part of the CEMP will include details of planned consultation and engagement with all relevant parties including site personnel, Employer, relevant local authorities; other statutory bodies and regulatory authorities, relevant community groups, recreational groups, and businesses and residents in local communities affected by the construction works. Additional mitigation proposed for the Proposed Development in relation to undertaking consultation regarding the betterment of recreational paths in the local area will also help to reduce the cumulative effect.

16.12.45 There could be a greater positive impact on quality of life should employment opportunities from other planned developments in addition to the Proposed Development result in more people in the local area gaining access to quality jobs. The influx of investment to the locality presents opportunities for TWP and other developers to collaborate in relation to developing strategies for sourcing local content for employment and training. This could be of particular value to people working in the O&G industry who are looking to transition into the green energy sector into highly skilled, quality jobs. As a result, these people could experience an improvement in wellbeing through better job security and satisfaction.

16.12.46 Overall, the magnitude of the impact is deemed to be Medium and the sensitivity of the receptor is considered to be High. The effect will therefore be of **Moderate** to **Major** adverse significance, which is significant in EIA terms. Considering the temporary nature of the construction effects and the high likelihood of best practice mitigation measures being applied across the other developments, the lower significance rating of **Moderate** is deemed to be the most likely effect.

Operation and Maintenance

16.12.47 During operation and maintenance, cumulative impacts on the socio-cultural character of the area could arise from other developments that are operational at the same time as the Proposed Development. It is recognised that during operation and maintenance, due to the extent of development proposed there may be a change in the character of the local area. The presence of large infrastructure developments could be viewed as detrimental to the existing tranquil, rural nature of the area, in particular for Fetteresso Forest Recreational

Area which is highly valued by the community. This could have a negative effect on community wellbeing; though it is acknowledged that the magnitude of effect is likely to reduce over time as the new developments are assimilated into the local area. Additionally, the effect is expected to be partly offset by the positive effect arising from provision of employment opportunities across the various developments which could improve socio-economic outcomes and quality of life.

16.12.48 Overall, the magnitude of the cumulative effect is deemed to be Low and the sensitivity of the receptor is considered to be High. The cumulative effect will, therefore, be of **Minor** adverse significance, which is not significant in EIA terms.

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

16.13.1 The development, construction, operation and maintenance and decommissioning of the Project has the potential to support a considerable level of economic activity in Scotland – particularly the North East – and the UK over the full project lifecycle (construction, O&M and decommissioning).

16.13.2 The onshore element of the Project comprises landfall and transition joint bays; an onshore export cable corridor; a substation; and a 400 kV cable corridor. The offshore element of the Project is expected to feature at least 40 offshore Wind Turbines generating a total expected capacity of around 1 GW. Together, this will contribute to meeting Scotland's and the UK's net-zero targets and supports the decarbonisation of economic activity. Investment in the Project is expected to create jobs, stimulate local industries, and boost economic activity in manufacturing, engineering and infrastructure.

16.13.3 The Project expenditure will drive economic activity through the GVA and jobs that it supports. Provision of highly skilled, productive jobs in the renewable energy sector will provide opportunities for those transitioning out of the O&G sector, in which employment is steadily declining.

16.13.4 Impacts on GVA and employment were assessed for the combined onshore and offshore elements of the Project. 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 it is expected that under the 'Commitments' scenario, the Project would support:

- 7,213 aFTEs (488 FTEs, and generate £2.37 billion
- GVA in the North East region;
- 20,608 aFTEs (1,393 FTEs), and generate £1,705 million GVA in Scotland; and
- 29,998 aFTEs (4,170 FTEs), and generate £2.2 billion GVA across the UK.

16.13.5 The North East region would experience **Moderate beneficial** effects on GVA and employment during all three project phases for the combined onshore and offshore elements of the Project, which is considered **Significant** in EIA terms.

16.13.6 The Project presents a strategic opportunity to integrate the existing Scottish O&G 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. TWP'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.

16.13.7 TWP is committed to continuing its engagement with local suppliers and encouraging growth in the regional and Scottish supply chain, as outlined in the Bowdun Offshore Wind Farm SCDS. Initial analysis undertaken by TWP in anticipation of updating the SCDS points towards the real potential for further increase in anticipated spend in Scotland above that which is currently committed to in the current SCDS.

16.13.8 In relation to other Socio-Economic, Tourism and Recreation effects assessed for the Proposed Development (onshore elements of the Project), no significant effects are assessed in relation to changes in demographics and changes to demand for housing and other services; changes to tourism and recreation receptors and changes to amenity of local public and private receptors arising from other environmental effects.

16.13.9 During construction, impacts on the socio-cultural character of the local area, and a resulting effect on community wellbeing, is assessed as of Minor to Moderate adverse significance, which is significant in EIA terms. This is expected to arise as a result of the amenity impacts on recreational routes, particularly in Fetteresso Forest Recreational Area, that are of local importance for community values and wellbeing. With implementation of mitigation measures, which involves consulting with relevant stakeholders in relation to potential improvements for recreational routes in the local area, the impact on socio-cultural character and community wellbeing is expected to reduce to Minor adverse (not significant) during construction, and Minor beneficial (not significant) during operation.

16.13.10 Significant adverse cumulative effects are assessed for construction and operation and maintenance phases in relation to socio-cultural impacts. During construction this would arise due to multiple developments with potentially overlapping construction phases, resulting in the presence of a transient workforce and greater disruption to journeys and accessibility to local facilities and recreational areas, resulting in a greater impact on community values and wellbeing than the Proposed Development in isolation. During operation and maintenance, a significant cumulative effect could arise due to the extent of development proposed, causing a change in the rural, tranquil character of the local area. These effects are expected to be partly offset by the positive effect arising from provision of employment opportunities across the various developments which could improve socio-economic outcomes and quality of life. However, a residual **Moderate adverse** cumulative effect would remain for the construction phase.

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Annex – Figures

N

Lossiemouth
Burghead
Findochty
Buckie
Portsoy
Macduff
Fraserburgh
Elgin
Forres
Nairn
Aberchirder
Turriff
Peterhead
Keith
Rothes
Charlestown of Aberlour
Dufftown
Huntly
Ellon
Oldmeldrum
Grantown-on-Spey
Inverurie
Alford
Kintore
Aviemore
Cairngorms National Park
Ballater
Stonehaven
Brechin
Montrose
Pitlochry
Kirriemuir
Forfar
Aberfeldy
Blairgowrie and Rattray
Arbroath
Carnoustie
Dundee
Perth

0 30 km

Legend

North East

Local Authority

Aberdeen City

Aberdeenshire

Angus

Kincardine and Mearns Committee Area

Wards

Mearns

Stonehaven and Lower Deeside

Jacobs

Client: THISTLE WIND PARTNERS

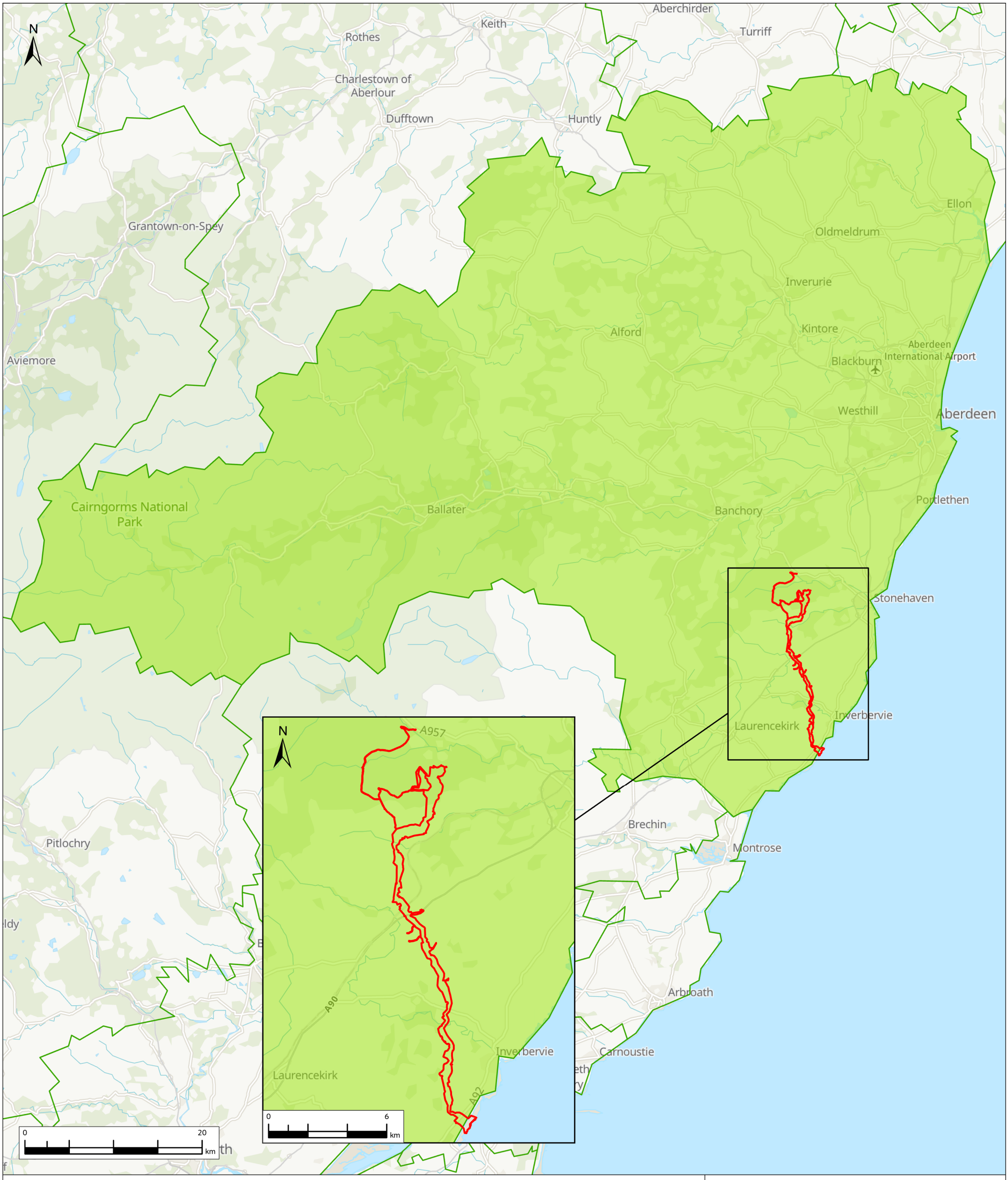
Project: Bowdun Offshore Wind Farm
Onshore EIA Report

Drawing Title: Socio-economics, Tourism and Recreation Study Areas

Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
02	NOV 25	FINAL	TM	GeM	GiM	GG
Scale @ A3		Scale: 1:500,000	DO NOT SCALE			
Jacobs No.		B2487500				

Aconnex Number	Drawing Status
TWP-BOW-JCB-ONE-DWG-00038	FINAL

Figure 16.1



Legend

- PPP Application Boundary
- Travel To Work Area (TTWA)
- Aberdeen TTWA

Jacobs

Client: THISTLE WIND PARTNERS

Project: Bowdun Offshore Wind Farm
Onshore EIA Report

Drawing Title: Travel To Work Area (TTWA)

Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
02	NOV 25	FINAL	TM	GeM	GiM	GG
Scale @ A3		Scale: 1:400,000	DO NOT SCALE			
Jacobs No.		B2487500				

Aconnex Number: TWP-BOW-JCB-ONE-DWG-00037

Drawing Status: FINAL

Figure 16.2

N

A957
A957
B979
A90
A92
Toddie Brae
Cowie
Stonehaven
Brae of Glenbervie
A90
A92
Brae of Glenfarquhar
Drumlithie
Brae of Kinkell
Auchenblae
Causeywell Brae
Catterline
A90
B966
Moor of Auchendreich
Roadside of Kinneff
Fordoun
B967
Arbuthnott
A92
B967
Inverbervie
A90
Laurencekirk
Gourdon
Whitewater Moss
Brawleymuir Plantation
Craighead Plantation
B9120
B9120
0
5
km

Legend

PPP Application Boundary

Scottish Index of Multiple Deprivation 2020

2,657

6,959

Blackburn
Aberdeen

Jacobs

Client: THISTLE WIND PARTNERS

Project: Bowdun Offshore Wind Farm
Onshore EIA Report

Drawing Title: All Deciles of Deprivation

Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
02	NOV 25	FINAL	TM	GeM	GiM	GG
Scale @ A3		Scale: 1:70,000	DO NOT SCALE			
Jacobs No.		B2487500				

Aconnex Number: TWP-BOW-JCB-ONE-DWG-00034

Drawing Status: FINAL

Figure 16.3

STEEPLE SHOP

ST JOHN BAPTIST CHURCH

DRUMLITHIE PUBLIC HALL

GLENBERVIE PRIMARY SCHOOL

DRUMLITHIE BOWLING CLUB

DRUMLITHIE PARK

DRUMLITHIE POST OFFICE

ARBUTHNOTT PARISH CHURCH

Toddie Brae
Cowie
Stonehaven
Brae of Glenfarquhar
Brae of Kinkell
Auchenblae
Causeywell Brae
Catterline
Moor of Auchendreich
Roadside of Kinneff
Arbuthnott
Whitewater Moss
Brawleymuir Plantation
Craighead Plantation
A957
B979
A90
A92
B967
B9120

Hillrise
B966
Fordoun
Glenbervie
School Rd
Croft Rd
High St
Drumlithie
Playing Field
Bowling Green
Station Rd
Orchard Hill
0 20 km

0 5 km

Legend

PPP Application Boundary

500m buffer of PPP Application Boundary

Receptors outside the 500m buffer from PPP Application Boundary

- Commercial Receptors*
- Community Receptors

Receptors inside the 500m buffer from PPP Application Boundary

- Commercial Receptors*

Community Receptors

- Community Facility
- Education
- Place of Worship
- Sports Facility

*Air BnB's and holiday homes are not shown on the map to protect the privacy of these locations.

Blackburn
Aberdeen

Jacobs

Client: THISTLE WIND PARTNERS

Project: Bowdun Offshore Wind Farm Onshore EIA Report

Drawing Title: Public and Private Receptors

Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
02	NOV 25	FINAL	TM	GeM	GiM	GG
Scale @ A3		Scale: 1:70,000	DO NOT SCALE			
Jacobs No.		B2487500				

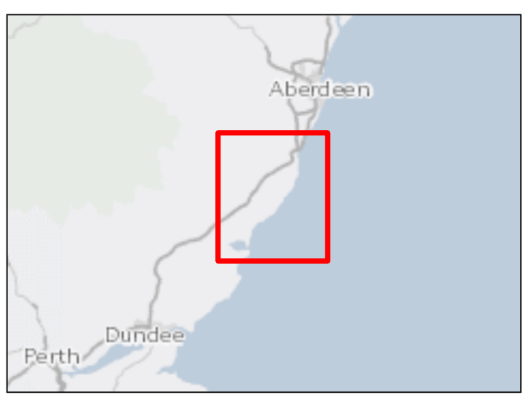
Aconnex Number: TWP-BOW-JCB-ONE-DWG-00035

Drawing Status: FINAL

Figure 16.4

Legend

- PPP Application Boundary
- 500m buffer of PPP Application Boundary
- Tourism and Recreation Receptors
- Core Paths
- Local Paths
- National Cycle Network
- Recreational Cycle Routes
- Fetteresso Forest Recreational Area



Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
02	NOV 25	FINAL	TM	GeM	GiM	GG
Scale @ A3		Scale: 1:120,000	DO NOT SCALE			
Jacobs No.		B2487500				

Jacobs

Client: THISTLE WIND PARTNERS

Project: Bowdun Offshore Wind Farm
Onshore EIA Report

Drawing Title: Tourism and Recreation Receptors

Aconnex Number	Drawing Status
TWP-BOW-JCB-ONE-DWG-00036	FINAL

Figure 16.5