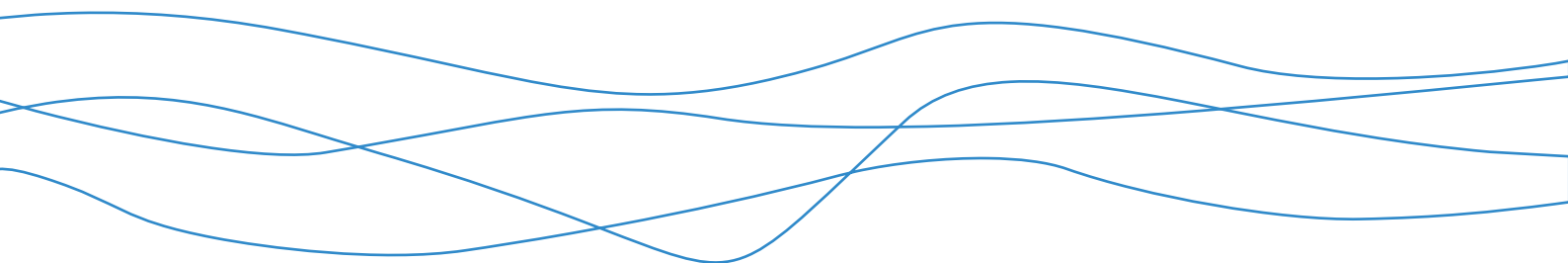




Bowdun Offshore Wind Farm, Onshore EIA Report

Appendix 16.1: Socio-Economics, Tourism and
Recreation Baseline

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Glossary

Defined term	Definition
Gross Disposable Household Income (GDHI)	Measures the total amount of money households have available to spend or save after paying direct taxes and receiving benefits or welfare payments.
Gross Value Added (GVA)	Measures the contribution of individual companies, industries, and regions to the national economy. This figure is presented at current prices, reflecting the total value generated by the economy/sector after subtracting intermediate consumption (i.e., the cost of inputs used in production).
Gross Value Added (GVA) per head	Calculated by dividing the GVA for an area by the number of individuals in that area's resident population. Compares the economic output of regions of different sizes/population sizes.
Gross Value Added per Hours Worked (GVA/h)	Measures output in an industry or economy per number of hours worked by employees. This is the official and headline measure of labour productivity in the UK.
Local Authority	Local Authority is a body empowered by law to exercise various statutory functions for a particular area of the United Kingdom. Functions will cover planning, roads/highways, environmental health, flood protection, environment/ecology, cultural heritage and waste. The relevant Local Authority for this Project and the associated onshore elements is Aberdeenshire Council. In the context of the Proposed Development, they will also be the relevant planning authority.
Lower Quartile Incomes	25% of individuals in the population have incomes below the figure indicated. The measure is used to understand and compare the economic standing of the bottom 25% of earners in a population.
Normal Use Vacancy Rates	The percentage of normal use stock (residential properties) in an area which are vacant or unoccupied at a particular point in time.
Onshore	Area landward of Mean Low Water Springs.
Social Capital	The social connections that contribute to people's quality of life, health, safety, economy and wellbeing in the neighbourhoods where they live (Scottish Government, 2020).
Total Vacancy Rates	The percentage of all available units in an area which are vacant or unoccupied at a particular point in time.
Wellbeing-Adjusted-Life-Years (WELLBYs)	Calculates the wellbeing of the community. This involves multiplying the life expectancy of an area by its life satisfaction (0-10 scale) to quantify the social welfare of the population.

Acronyms

Acronym	Definition
B&Bs	Bed and Breakfasts
DESNZ	Department for Energy Security and Net Zero
GP	General Practice Medicine
GDHI	Gross Disposable Household Income
GVA	Gross Value Added
GVA/h	Gross Value Added per Hours Worked
NHS	National Health Service
O&G	Oil and Gas
ONS	Office for National Statistics
RQF4+	Regulated Qualifications Framework Level 4 and above
SIMD	Scottish Index of Multiple Deprivation
UK	United Kingdom
WELLBY	Wellbeing-Adjusted-Life-Years

Table of Units

Units	Definition
km	Kilometre
£	GBP
%	Percent

1 Introduction

- 1.1.1 This Appendix presents the Socio-Economics, Tourism and Recreation baseline data collected for the onshore infrastructure of the Bowdun Offshore Wind Farm ('the Project'). The onshore infrastructure of the Project, landward of Mean Low Water Springs (MLWS), is referred to as the 'Proposed Development'.

2 Baseline Environment

2.1 Description of Geographies

- 2.1.1 This section describes the geographies that comprise the different Study Areas for the Socio-Economic, Tourism and Recreation sub-topics set out in Table 16.1 of Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation and shown on Figure 16.1: Socio-Economics, Tourism and Recreation Study Areas. These administrative areas and national boundaries represent the spatial parameters that have informed collection of baseline data.
- 2.1.2 Aberdeen City is an urban local authority located in the Northeast of Scotland and is bounded on all sides by the Aberdeenshire Council area. Aberdeen City is the third most populous city in the country after Glasgow and Edinburgh. Aberdeenshire is a predominantly rural area in Northeast Scotland that includes the Cairngorm mountains, agricultural lowlands, and coastal landscapes.
- 2.1.3 There are six administrative districts within the Aberdeenshire council area: Banff and Buchan, Buchan, Garioch, Formartine, Kincardine and Mearns, and Marr (Aberdeen City Council, Aberdeenshire Council, 2023).
- 2.1.4 The Proposed Development is located within the committee area Kincardine and Mearns. Kincardine and Mearns is located to the south of Aberdeenshire. The area of Kincardine and Mearns is 756 sq. km, 12% of the whole Aberdeenshire area, and is defined by the foothills of the Grampian Mountains to the west and 59 km of coastline to the east (Aberdeenshire Community Planning Partnership, 2025). It borders Aberdeen City and Garioch to the north and Marr to the west.
- 2.1.5 Kincardine and Mearns is made up of the electoral wards North Kincardine, Mearns, and Stonehaven and Lower Deeside. The Proposed Development sits across two smaller electoral wards of Mearns and Stonehaven & Lower Deeside (referred to as the local area).
- 2.1.6 Within the local area, there are a number of small settlements within proximity of the Proposed Development - Arbuthnott, Benholm, Buckie's Mill & Newmill, Drumlithie, Gourdon, Inverbervie, Johnshaven, Rickarton, and Tannachie.

2.2 Baseline Environment

- 2.2.1 The subheadings in the baseline environment correspond with the subtopics within the assessment, as shown in Table 2.1. The data within the baseline has been collected through desk-based research and will be used to inform the assessment of impacts of the Proposed Development. A full list of data sources

is provided in Table 16.4 of Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation.

Table 2.1: Methodology

Subtopics of Assessment	Subheadings Within the Baseline
GVA, Employment and Supply Chain	Economic Sectors and Skills, Labour Market Indicators
Changes to Demographics	Population Baseline, Economic Sectors and Skills, Labour Market Indicators
Changes in Demand for Housing and Other Services	Housing and Vacant Property, Local Services (including Education, Healthcare Services, Emergency Services, and Public Transport Services)
Changes to Amenity of Local Public & Private Receptors	Public and Private Receptors (Community Receptors, Commercial Receptors)
Changes to Tourism and Recreation Receptors	Public and Private Receptors (Tourism and Recreational Receptors), Tourism, Tourism Accommodation
Socio-cultural impacts	Socio-cultural Community Values, Wellbeing, Social Deprivation

Economic Sectors and Skills

2.2.2 Gross Value Added (GVA) measures the contribution of individual companies, industries, and regions to the national economy. The latest data for GVA at basic prices in the UK is available on the Office for National Statistics (ONS), estimated at £2,601,631 million in 2024 (Office for National Statistics, 2025). This figure is seasonally adjusted and presented at current prices, reflecting the total value generated by the UK economy after subtracting intermediate consumption (i.e., the cost of inputs used in production). Data on GVA and employment for the UK, Scotland, Aberdeenshire, Aberdeen City and Angus are summarised in Table 2.2.

Table 2.2: GVA and Employment¹

	Aberdeenshire	Aberdeen City	Angus	Scotland	UK
GVA	£7.3 billion	£11.1 billion	£2.5 billion	£ 183.5 billion	£2,601.6 billion
Employment	134,800	123,900	51,800	2.7 million	34.2 million

2.2.3 Latest data for Scotland is available on the ONS from 2023, where Scotland's total GVA across all industries, at current prices, was estimated at £183.5 billion (Office for National Statistics, 2023).

¹ In the Economic Sectors and Skills and Labour Market Indicators sections, Aberdeenshire, Aberdeen City and Angus have been separated for comparison purposes. In Chapter 16: Socio-Economics, Tourism and Recreation these three local authorities have been grouped together and referred to as “The North East”.

- 2.2.4 In the second quarter of 2025, 2.67 million people were employed in Scotland (Statista, 2025). In the same period, it has been recorded that 34.2 million people were employed across the UK (UK Parliament, 2025).
- 2.2.5 In 2023, Aberdeen City's and Aberdeenshire's total Gross Value Added (GVA) was estimated at £11.1 billion and £7.3 billion respectively, producing a combined figure of £18.4 billion (Office for National Statistics, 2023). In 2023, Angus's GVA was estimated as much lower, at £2.5 billion (Office for National Statistics, 2023).
- 2.2.6 Across Aberdeen City and Aberdeenshire the industries with the highest GVA include: Professional, Scientific and Technical Activities (£1,802m), Manufacturing (£1,726m), Real Estate Activities (£1,494m), Wholesale and Retail (£1,440m) (Just Transition Commission, 2025). In 2022, these sectors had respective turnovers of £5,380.7m, £2,874.6m, £115.6m and £3030.1m in Aberdeenshire, and £3,128m, £1,855m, £212m and £3,787.3m in Aberdeen City (Scottish Government, 2024).
- 2.2.7 Between 1998 and 2014, Aberdeenshire's GVA per head nearly doubled, rising from £15,862 to £31,339 - an increase of over 98%, outperforming the national average growth of 76%. However, this upward trend reversed after 2014, with GVA per head falling to £27,392 by 2020. In 2021, GVA reached £28,821, placing Aberdeenshire 10th among Scottish local authorities. Throughout this period, Aberdeen City consistently maintained a higher GVA per head, recording £45,491 in 2021, higher than Aberdeenshire and the Scottish average of £27,447 (Stanford & Watson, 2024).
- 2.2.8 Trends within Angus have demonstrated a similar positive trajectory, with GVA per head increasing from £35,062 in 2008 to £51,320 in 2019 - a 46.3% increase. This greatly outperformed trends in Scotland, which recorded a 7.3% increase over the same period. Total turnover of companies in Angus also increased, rising by 30.8% between 2008 and 2019, from £2.4 billion to £3.1 billion. This is significantly higher than the national average, as Scottish companies had a total turnover increase of only 4.2% in that same period. Angus' key sectors which have supported GVA and turnover growth in recent decades include Food and Drink, Tourism and Engineering and Manufacturing (Invest In Angus, 2022).
- 2.2.9 Latest data for GDP for per head, at current prices, is available for 2023, which highlights that Aberdeen City had the largest GDP per head of £52,583, above the Scottish average of £37,192. Aberdeenshire had a GDP per head of £31,115 and Angus had a GDP per head of £25,918 (Office for National Statistics, 2025).
- 2.2.10 The three largest sectors of employment across Aberdeen City and Aberdeenshire and within Mearns and Stonehaven and Lower Deeside are Human Health and Social Work (40,200), Mining and Quarrying (34,500) and Scientific and Technical Activities (28,100). Over the long-term, the greatest employment growth is predicted for Human Health and Social Work (1,200 by 2034), whilst Mining and Quarrying will see the largest reduction (3,700 by 2034) (Skills Development Scotland, 2024).

- 2.2.11 The Professional, Scientific, and Technical Activities sector is notably more prominent in Aberdeenshire, where it accounts for 11.0% of employment, compared to 7.2% across Scotland. The construction industry in Aberdeenshire employs 7.0% of the local workforce, higher than the national average of 5.9%. Manufacturing also provides a high number of jobs (13.0% of jobs compared to the national average of 7.1%) (Office for National Statistics, 2025).
- 2.2.12 In comparison, in Aberdeen City, Construction (3.8%) and Manufacturing (5.0%) employment is lower than the averages for Scotland (5.9% and 7.1%, respectively). However, as in Aberdeenshire, employment in Professional, Scientific and Technical Activities in Aberdeen City is much higher than the national average, employing 12.6% of the workforce (Office for National Statistics, 2025).
- 2.2.13 The three largest sectors of employment in Angus are Wholesale and Retail Trade (6,000; 17.6%), Human Health and Social Work (6,000; 17.6%) and manufacturing (4,500; 13.2%). The proportion of employment within these sectors is greater than the national averages (12.7%, 16.7%, 7.1%, respectively) (Office for National Statistics, 2025).
- 2.2.14 The Oil and Gas (O&G) industries are of great importance to the region of Aberdeen City and Aberdeenshire as high productivity and incomes are generally linked to the North Sea O&G sector (Office for National Statistics, 2021). In 2024, the industries supported approximately 68% of all energy sector jobs in the ‘Central Lowlands’ region (this area includes Aberdeenshire and Aberdeen City) (Energy Skills Intelligence Hub, 2024), and approximately 40,000 people travelled to work offshore in the O&G industries last year, with the majority being based in Aberdeen and Aberdeenshire (State of the Coast, 2025). Moreover, it is reported that 97% of Scotland’s employment involving the extraction, support activities, and manufacturing of petroleum was in Aberdeen City and Aberdeenshire in 2023 (Just Transition Commission, 2025).
- 2.2.15 However, the industry is declining, with projections suggesting a decrease in UK O&G employment from 60% to 40% by 2030 (Energy Skills Intelligence Hub, 2024). 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). Therefore, the region is now pursuing economic diversification, increasing investment into the reskilling of O&G workers, the development of renewable energy sources and supporting an increase in ‘green’, high-value jobs (Community Planning Aberdeen, 2023). Forecasts estimate that 90% per cent of O&G industry workers possess medium to high skills transferability, and are equipped to transition into new, renewable energy sector jobs (Offshore Energies UK (OEUK), 2023; Community Planning Aberdeen, 2023).
- 2.2.16 There were 21,899 energy sector jobs across the ‘central lowlands’ region in Scotland in 2024, with 4,156 in Fixed Offshore Wind and 362 in Floating Offshore Wind. Furthermore, in 2024, Offshore Wind (fixed and floating) was estimated to provide 24% of all energy sector jobs across the UK (Energy Skills Intelligence Hub, 2024). This is expected to rise to 45% in 2030, where the Offshore Wind

industry is forecast to employ approximately 104,000 employees in the UK (Offshore Wind Industry Council, 2023).

- 2.2.17 The Department for Energy Security and Net Zero (DESNZ) have announced plans to support the development of the clean energy sector in Aberdeenshire, starting with a new skills pilot, where 200 workers from Aberdeenshire will be offered “tailored support and funding” to help drive a future of clean energy in North Sea. The Oil and Gas Transition Training Fund is backed by £900,000 of government funding, with the aim of transitioning workers into thousands of high-quality ‘green’ jobs (Department for Energy Security and Net Zero , 2025). Additionally, the transition is supported by the introduction of ‘skills passports’, which demonstrate to both employers and workers how skills and qualifications can be recognised by employers across sectors (Offshore Energies UK (OEUK), 2023).
- 2.2.18 Angus is also a key area for offshore wind development, with prospects of increasing ‘green’ employment and business opportunities off the coast of Tayside (Invest In Angus, 2022). In 2024, a new skills academy was announced to be built in Montrose, educating, upskilling and training individuals to work in renewable energy, with the aim of supporting the growing demand for new workers in offshore wind and other low carbon technologies. It has received £1.25 million of funding from Scottish Government’s Tay Cities Industrial Investment Programme (Angus Council, 2024).
- 2.2.19 Table 2.3 presents the breakdown of Scottish skills levels within the energy sector. The majority of jobs require a high-level of skill between 7 and 9+ (Energy Skills Intelligence Hub, 2024). In the ‘central lowlands’ region, 70.5% of workers are currently occupying jobs with a high skill level between 7 and 9+.

Table 2.3: Energy Sector Jobs by Skill Level (Energy Skills Intelligence Hub, 2024)

	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9+
Energy Sector Jobs	14	279	592	1,634	88	1,621

- 2.2.20 Aberdeenshire and Aberdeen City is a key ‘energy transition hub’, due to the reskilling and upskilling of its workforce, its established infrastructure, its well-connected location and its reliable supply chain (Invest Aberdeen, n.d.). For instance, in addition to commitments made by TWP, the developers of other Offshore Wind projects in Aberdeenshire, such as Green Volt, are expected to support the scaling up of the renewables supply chain, and as a collective, have committed to investment of £21 billion into Scotland’s supply chain (Invest Aberdeen, n.d.).

Labour Market Indicators

- 2.2.21 Table 2.4 presents key labour market statistics for 2023, comparing Aberdeenshire, Aberdeen City and Angus to Scotland as a whole. Key indicators include employment rates, Gross Value Added per Hours Worked (GVA/h), and the proportion of individuals with Regulated Qualifications Framework Level 4

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

Table 2.4: Labour Market Indicators (Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Employment Rate, 2024	74.3%	76.5%	70.5%	74.1%
Economic Inactivity, 2024	22.3%	21.4%	26.7%	23.1%
Unemployment Rate, 2024	2.5%	3.9%	3.2%	3.6%
Gross Weekly Pay, by Place of Residence, 2024	£783.90	£721.70	£682.50	£740
Claimant Count, 2024	1.9%	3.4%	2.9%	3%
GVA/h, 2023	£37.3	£39.3	£39.9	£41.3
RQF4 and Above Qualifications, 2024	58.8%	62.4%	51.6%	53.7%
No Qualification, 2024	N/A	4.8%	8.6%	8.2%

2.2.22 Table 2.4 shows that Aberdeenshire has a relatively high employment rate (74.3%) and low economic inactivity (22.3%) compared to the national average (74.1% and 23.1%, respectively). This indicates that the labour market is strong. Table 2.4 also shows that Aberdeen City has a high proportion of people with RQF4+ qualifications (62.4%), especially when compared with the national average of 53.7%. In Angus, both the employment rate (70.5%) and the proportion of people with RQF4+ qualifications (51.6%) is lower than that of Scotland, Aberdeenshire and Aberdeen (Office for National Statistics, 2025).

2.2.23 In 2025, Scotland's employment rate for individuals aged 16 to 64 was 74.1% (Scottish Government, 2025), with approximately 2.67 million people in work (Statista, 2025). Across the UK, approximately 34.2 million people are employed (Statista, 2025), representing an employment rate of 75.5% and unemployment rate of 4.1% (Office for National Statistics, 2025).

2.2.24 In 2025², the workforce size in Aberdeenshire and Aberdeen City is 134,800 and 123,900, respectively (Office for National Statistics, 2025; Office for National Statistics, 2025). The workforce size in Angus is much lower, consisting of 51,800 people (Office for National Statistics, 2025).

2.2.25 In past decades, labour productivity across Aberdeen City and Aberdeenshire have typically been higher than the national and UK averages (Office for National Statistics, 2021). In 2014, Aberdeenshire had a GVA/h of £35.2, and Aberdeen City had a GVA/h of £35.6, much higher than the Scottish average of £31.6 and the UK average of £32.0. Whereas by 2021, although productivity increased, the two local authorities performed below the national average (£38.8) and the UK average (£39.5), with GVA/h of £37.2 in Aberdeenshire and £37.8 in Aberdeen City. In 2023, as shown in Table 2.4, both Aberdeen City and Aberdeenshire had

² Data is for July 2024 - June 2025

lower GVA/h than in Scotland (£41.3) and the UK (£41.9) (Office for National Statistics, 2025).

2.2.26 Angus has seen experienced a different trajectory, with low GVA/h in 2014 of £27.8, but increasing to £38.7 by 2021. In 2023, Angus had the highest labour productivity of the three local authorities (£39.9), just below the Scottish average of £41.3 (Office for National Statistics, 2025).

2.2.27 Table 2.5 compares gross weekly pay by place of residence across Aberdeenshire, Aberdeen City, Angus and Scotland for full-time workers, broken down by gender. As shown in Table 2.5, full-time workers in Aberdeenshire earn the most on average (£783.90), followed by Scotland (£740.00), and Aberdeen City (£721.70). Male workers in Aberdeenshire earn significantly more (£826.10) than their counterparts in Aberdeen City (£736.70) and Scotland overall (£767.70). The gross weekly pay for Angus (£682.50) is lower than Scotland, Aberdeen City and Aberdeenshire.

Table 2.5: Weekly Income (Full-Time Workers) (Office for National Statistics, 2024)

Gross Weekly Pay, 2024	Aberdeenshire	Aberdeen City	Angus	Scotland
Full-Time Workers	£783.9	£721.7	£682.5	£740.0
Male	£826.1	£736.7	£708.6	£767.7
Female	£696.5	£708.0	£606.9	£701.0

2.2.28 The average household income in Aberdeenshire in 2024 was £45,853, this is higher than the national average of £39,386 (Aberdeenshire Council, 2025).

2.2.29 Table 2.6 below shows the average household income for settlements in the region (Aberdeenshire) and the percentage change over the last five years. Over this period, average household incomes in Aberdeenshire have increased by 23%, compared to a 32% increase in Scotland. Lower quartile incomes are also shown, indicating that 25% of households in the settlements have incomes below the figures in Table 2.6 (Lower Quartile Income 2024). The figures suggest that average household incomes are higher in Aberdeenshire than the rest of Scotland (Aberdeenshire Council, 2025).

2.2.30 Recent data on median household income for Aberdeen City and Angus are not available. However, according to Centre for Cities, in 2024, Aberdeen City was in the top 10 UK cities for the highest average wages (by place of work) of £765.80 per week, equating to £39,822, which was higher than the average for the UK (£37,206) (Centre for Cities, 2025). Equally, when looking at income by place of residence, the average annual income of full-time workers in Aberdeen City is estimated at £37,528, lower than the Scottish average of £38,480 (Office for National Statistics, 2025). The average annual income for full-time workers in Angus (by place of residence) is also below the Scottish average, estimated at £35,490 (Office for National Statistics, 2025).

Table 2.6: Household Income for Settlements (Aberdeenshire Council, 2025)

	Average Income 2024	Change in Average Income 2019-2024	Lower Quartile Income 2024
Gourdon	£45,391	33%	£25,599
Inverbervie	£43,915	18%	£24,136
Laurencekirk	£46,397	31%	£25,786
Stonehaven	£48,189	21%	£27,110
Aberdeenshire	£45,853	23%	£25,340
Scotland	£39,386	32%	£21,721

Population Baseline

2.2.31 Table 2.7 presents population statistics for the National Area, Regional Area and Local Area, comparing respective population breakdowns by age.

Table 2.7: Population Demographics (Aberdeenshire Council, 2023; Scottish Government, 2022)

	Mearns	Stonehaven and Lower Deeside	Aberdeenshire	Aberdeen City	Scotland
Total Population	15,770	14,483	264,320	227,750	5.490m
% under 16	19.9	17.3	18.5	15.7	19.9
% aged 16-64	60.6	60.3	60.5	67.2	60.6
% aged 65+	19.5	22.6	21.0	17.1	19.5
Population Density /km²	16.0	75.6	41.9	1227	16.0
Number of Households	6,637	6,466	115,769	109,450	6,637

2.2.32 Aberdeenshire is the 6th most populous council area in Scotland. As illustrated in Table 2.7, there was a lower-than-average population of children and a higher-than-average population aged 65 and over. Aberdeen has a high population density and a predominantly working-age population, with 67.2% of its residents falling within this age group.

2.2.33 Between 2022 and 2023, the population of Aberdeen City grew by 1.6% and Aberdeenshire's grew by 0.2% (National Records of Scotland, 2025).

Housing and Vacant Property

2.2.34 The private rented sector plays an important role in Aberdeen City, especially for those who cannot purchase a home or access social housing. Around 20% of households in Aberdeen belong to the private rented sector, which is higher than the average for Scotland (approximately 13%) (Aberdeen City Council, 2025). In contrast, only 56% of dwellings were reported as owner occupied, lower than the Scottish average of 61% (Aberdeen City Council, Aberdeenshire Council, 2023). Despite the private rented sector playing an important role in Aberdeen, and above average increases in the proportion of private rented dwellings in recent decades, the supply of private rented properties in the city

has dropped by almost 20% since 2019 due to issues of volatile rent levels, increasing costs, and a strengthening in tenants' rights, which has caused landlords to leave the market (Aberdeen City Council, 2025).

- 2.2.35 The private rented sector is less prominent in Aberdeenshire, particularly in rural areas, which tend to be characterised by larger properties and a culture of house ownership. In Aberdeenshire, only 11% of dwellings belonged to the private rented sector in 2023, lower than the national average of 13%. Furthermore, 71% of dwellings were owner-occupied, compared to 61% across Scotland (Aberdeen City Council, Aberdeenshire Council, 2023).
- 2.2.36 Private rents are averaged across both Aberdeen City and Aberdeenshire. Private rents in Aberdeen City and Aberdeenshire averaged at £850 per month in August 2025, a 3.7% rise since August 2024. This is compared to 3.5% rise across Scotland in the same period, where average private rents averaged at £1002 in August 2025. Across the UK, the average rent price was £1348 in August 2025, an annual rise of 5.7% (Office for National Statistics, 2025). The average rental price in Stonehaven is £718 per month (Houses for Sale and to Rent, 2025).
- 2.2.37 Local authority total and vacant housing stock data from March 2024 shows that Aberdeen City had the highest amount of vacant stock of all the Scottish local authorities (2,300 units; 20% of Scotland's total vacant stock) (Scottish Government, 2024).
- 2.2.38 Table 2.8 lists the total vacancy rates compared to normal use vacancy rates for Aberdeen City, Aberdeenshire and Scotland. In Aberdeen City, there was a vacancy rate of 9.9% in 2024, which has increased by 7% since 2020 and is significantly higher than the 2024 total vacancy rate for Scotland (3.6%). However, in 2024, 88% of vacant stock was normal use stock (2,019 out of 2,300). Nonetheless, when looking at length of vacancy, Aberdeen City has seen an increase in properties vacant for 26 weeks to two years (6% in 2020 to 49% in 2024) (Scottish Government, 2024).
- 2.2.39 In Aberdeenshire, the total vacancy rate is significantly lower at 3.2% and is similar to the Scottish average of 3.6%. Despite lower vacancy rates, only 32% of the vacant stock is normal use stock (141 of 430), lower than the Scottish average of 48%.
- 2.2.40 Both Aberdeen City and Aberdeenshire have been linked to a large quantity of long-term vacant properties, which is often associated with the recent downturn in the local oil and gas industry. These economic trends have led to the migration of workers away from these industries and the area, which subsequently spurred a downturn in the property market (Aberdeen City Council, Aberdeenshire Council, 2023).

Table 2.8: Local Authority Vacant Housing Stock 2024 (Scottish Government, 2024)

	Total Vacancy Rate	Vacant Stock	Normal Use Vacancy Rate	Normal Use Vacant Stock
Aberdeenshire	3.2	430	1.1	141
Aberdeen City	9.9	2,300	9.0	2,019
Scotland	3.6	11,751	1.9	5,640

2.2.41 Kincardine and Mearns’s dwelling type proportions are similar to that of Aberdeenshire as a whole: 11% of Kincardine and Mearns properties are flats, 13% are terraced, 29% are semi-detached and 47% are detached (Aberdeen City Council, Aberdeenshire Council, 2023). In Kincardine & Mearns, the average house price was £248,496 in 2021 (Aberdeenshire Council, 2023).

2.2.42 Between 2019 and 2021, there were 704 housing completions in Kincardine & Mearns (Aberdeenshire Council, 2023) and forecasts suggest that housing stock is increasing, with 23% of Aberdeenshire’s total new homes projected to be built in the area between 2022-2026. The top 4 settlements for new homes across the area (2012-2021) include: Portlethen, Chapelton, Stonehaven and Laurencekirk (Aberdeenshire Council, 2023). Furthermore, when looking at the immediate local area to the proposed scheme, between 2019 and 2021, Stonehaven had 156 new housing completions, whereas Drumlithie and Gourdon had 0, Inverbervie had 4 and Johnshaven had 10 (Aberdeenshire Council, 2023).

2.2.43 Between 2023/4 and 2024/5, construction sector challenges have led to a 12% fall in building completions across Aberdeenshire, which is much larger than the 4% decline across Scotland. The number of new builds starts in that period declined substantially in Aberdeenshire, with a fall of 29%, compared to 11% in Scotland (Aberdeenshire Council, 2025).

Local Services

Education

2.2.44 In Aberdeenshire, there are 145 primary schools, 17 secondary schools, 88 nursery schools and 4 special schools, educating 20,125 primary school pupils and 15,892 secondary school pupils (Aberdeenshire Council, 2025). Despite continued housebuilding, shifting demographics in Aberdeenshire is causing the number of enrolments to fall in primary schools, whilst secondary schools face capacity pressures, as larger primary school cohorts from previous years progress through education (Aberdeenshire Council, 2025).

2.2.45 In Kincardine and Mearns, there are approximately 22 primary schools and 3 secondary schools (Aberdeenshire Council, 2025). Between 2020 and 2024, primary school pupil numbers have declined by 75 and secondary school pupil numbers have seen a small increase. As of 2025, no schools in the area are operating in excess of capacity (Aberdeenshire Council, 2025). Portlethen Academy is projected to be over 100% capacity in 2029/30. Conversely, Luthermuir School (already below 50% capacity), and 6 other schools are forecast to be below 50% capacity in 2029/30 (Aberdeenshire Council, 2025).

Healthcare Services

- 2.2.46 In Kincardine and Mearns, there 5 General Practice Medicine (GP) practices, 0 Emergency Departments and 1 major injuries unit. Kincardine Community Hospital is a small, private hospital in Stonehaven which serves the area, with the National Health Service (NHS) owning the inpatient GP Acute ward and outpatient areas. There are 15 care homes, of which 8 are for elderly care (Aberdeenshire Health and Social Care Partnership, 2024).
- 2.2.47 A report by Aberdeenshire Health and Social Care Partnership revealed that, when extracting data from 2023-2024, Kincardine and Mearns had low demand for emergency services relative to Scotland. For instance, 7,533 emergency hospital admissions per 100,000 population, compared to the average of 10,367 in Scotland, and 12,162 A&E attendances per 100,000 population, compared to 26,382 in Scotland (Aberdeenshire Health and Social Care Partnership, 2024).
- 2.2.48 However, other health and social care services in Kincardine and Mearns are facing increasing pressures due to the ageing population and spending constraints (Aberdeenshire Health and Social Care Partnership, 2025).
- 2.2.49 Some services are performing well, for instance Stonehaven Vaccination Centre has increased its provision, providing 16,701 vaccinations between the 1st of November 2024 and the 21st of January 2025 (Aberdeenshire Health and Social Care Partnership, 2025). Although mental health services are experiencing high demand, provision of the service is stable, working closely with the community Mental health team to ensure prompt consultations with patients (Aberdeenshire Health and Social Care Partnership, 2025).

Emergency Services

- 2.2.50 Fire and Rescue establishments in Kincardine and Mearns include Inverbervie, Laurencekirk and Stonehaven fire stations. In the final quarter of 2024, there were 64 incidents in Kincardine and Mearns, comprising 3 deliberate fires and 19 accidental fires, 24 special service incidents and 18 false alarms. This resulted in 0 fire fatalities, 0 non-fatal fire casualties and 10 road-traffic collision casualties (Scottish Fire and Rescue Service, 2025).
- 2.2.51 Annual statistics suggest decreasing demand for this service, with a fall in the number of deliberate fires between 2023/24 and 2024/25, and the number of accidental dwelling fires is at its lowest levels in 5 years. This can be attributed to increased Home Fire Safety Visits. For instance, in Q4 of 2024, Scottish Fire and Rescue conducted 39 visits across Kincardine and Mearns, including 15 in Mearns and 16 in Stonehaven and Lower Deeside. Finally, there has been no annual increase in non-domestic fires and a decrease in non-fire emergencies in the 5-year period (Scottish Fire and Rescue Service, 2025).
- 2.2.52 In terms of police services, Kincardine and Mearns is served by Aberdeenshire South area command, with police stations in Laurencekirk and Stonehaven (Police Scotland, 2023). In general, residents of Aberdeenshire are more likely to be employed, earn higher incomes and live longer and healthier lives compared to Scottish averages, and therefore, experience fewer incidents involving crime and related disorder to other regions (Police Scotland, 2023).

However, despite lower demand for policing services compared to other areas in Scotland, demand in the region is still increasing, due to rises in issues such as cybercrime.

2.2.53 In response to increasing demand, police in Aberdeenshire South are adapting and generally providing a quality service. According to local consultations, over 71% of people surveyed were satisfied they were provided with an appropriate response by Police Scotland and over 90% were satisfied with the Officers who attended their calls. In terms of community policing, including police presence and visibility, 92% of those surveyed said they felt safe (Police Scotland, 2024).

2.2.54 Ambulance services in the region are served by Scottish Ambulance Service, primarily operating out of Aberdeen, in addition to an Independent Ambulance service, Scot Medical, which operates out of Laurencekirk. Demand for ambulance services in the area are on the rise and NHS Grampian, the regional health board for Aberdeenshire and Aberdeen City, have been linked to a crisis of ambulance queues and poor response times. In 2024, NHS Grampian ambulances had the longest turnaround times of all the 14 health boards in Scotland, with an average of 3.58 hours. Furthermore, between May 2024-25, the largest proportion (28.81%) of respondents waited over an hour for their ambulance to arrive (Rutherford, Sabljak, 2025).

Public Transport Services

2.2.55 In Kincardine and Mearns, train stations are situated in Stonehaven, Portlethen and Laurencekirk. The most available public transport in the area is local buses, run by Stagecoach. For example, the 8A and 8C routes provide frequent transport in Stonehaven. Moreover, Aberdeenshire Council's rollout of the A22B dial-a-bus, a council operated minibus service, has been a welcome addition to local transport, available for those in smaller villages with difficulty walking, with a disability, and those who don't live near local bus routes (Aberdeenshire Community Planning Partnership, 2024).

2.2.56 Public transport demand is high, particularly for reliable and affordable options, however, provision and connectivity are poor in many areas. For example, consultation feedback suggests the X7 bus (between Johnshaven, Stonehaven, and Aberdeen) is not practical due to poor bus design and limited seating. Additionally, some bus routes have poor connection times, which do not align with train timetables, meaning connecting with onward travel is difficult and waiting times are long (Aberdeenshire Community Planning Partnership, 2024).

Tourism

2.2.57 The tourism industry in Aberdeenshire and Aberdeen City is a significant contributor to the regional economy, and in 2024, Aberdeen ranked 7th in spending by overnight visitors in UK cities, with an average spend per overnight visit of £107.60 (Aberdeen City Council, 2024). As of 2020, 1 in 10 Scottish tourism jobs were based in the Aberdeen City region (Strategic Development Planning Authority, 2020).

2.2.58 Figures from independent research conducted by Global Tourism Solutions (GTS) using the Scottish Tourism Economic Activity Monitor (STEAM) model

show an upward trajectory for the region's tourism sector. Key findings were as follows (Opportunity North East, 2025):

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

- 2.2.59 The local area of Mearns, Stonehaven and Deeside has a range of natural, cultural and infrastructural tourism assets, that contribute to regional economic development. This includes a popular coastline that is notable for attracting family-oriented and nature-based tourism through the provision of coastal walks, footpaths, wildlife observation sites and heritage sites. There are also opportunities for water sports, and recreational activities at Stonehaven beach (Visit Aberdeenshire, n.d.)
- 2.2.60 Visitor data for Aberdeenshire reveals a strong preference for rural and nature-based experiences, with 25% of tourists choosing to stay in countryside or rural locations. Scenic landscapes were the primary motivator for travel, cited by 70% of respondents, followed by interest in history and culture (53%) and outdoor activities (36%). Accommodation choices varied, with 30% opting for serviced accommodation - primarily hotels (25%) and guest houses (5%) - while 71% selected non-serviced options, including camping, caravans, and motorhomes (26%). Cultural and recreational engagement was high, with 48% visiting castles or forts, 44% exploring historic houses or stately homes, 33% viewing architecture, 31% participating in hill walking or mountaineering, and 28% visiting country parks or gardens (Visit Scotland, 2023).
- 2.2.61 Visitor profile data from (Visit Scotland, 2023) indicates that 71% of overnight visitors to Aberdeenshire were domestic, with international visitors comprising the remaining 29%. Demographically, 14% of visitors were families, while 39% were of retirement age and another 39% were older independent travellers.
- 2.2.62 Table 2.9 lists key tourism statistics for the Regional Area, including tourism employment, businesses and turnover.

Table 2.9: Tourism: Employment and Economic Performance (Visit Scotland, n.d.)

	Aberdeenshire	Aberdeen City
Tourism Employment in 2023	8,000	11,000
Tourism Employment as a Percentage of All Employment	5.3%	9.2%
Tourism Businesses in 2024	695	550
Tourism Businesses as a Percentage of All Businesses	5.4%	6.3%
Tourism Turnover in 2022	£346 million	£477 million
Total Tourism GVA Per Head in 2022	£22,882	£24,269

Tourism Accommodation

2.2.63 Available data on the tourism accommodation stock available in Aberdeenshire has been drawn from the Aberdeenshire Accommodation Audit 2023. The audit states that ‘*the exact size of the accommodation sector is not currently known, mainly due to the fact there is no compulsory registration scheme for all types of accommodation establishments in the UK*’ (Visit Aberdeenshire, 2023). Table 2.10 presents the key findings in relation to Aberdeenshire and Kincardine and Mearns. Serviced accommodation covers options such as hotels, guest houses, and Bed and Breakfasts (B&Bs), whilst non-serviced accommodation covers self-catered accommodation, hostels and serviced apartments (Visit Aberdeenshire, 2023).

Table 2.10: Tourism Accommodation Aberdeenshire (Visit Aberdeenshire, 2023)

	Establishments	Rooms/Pitches	Bed Spaces
Serviced	16%	27%	23%
Non-Serviced	76%	41%	35%
Holiday/Touring Park	8%	33%	41%
Total	1,152	8,146	18,855

2.2.64 Non-serviced accommodation (self-catering, serviced apartments, exclusive use venues and hostels) is the greatest contributor to establishments and rooms across Aberdeenshire. Of the non-serviced accommodation in Aberdeenshire, 74% of establishments and 32% of bed spaces were self-catered. In contrast, holiday and touring parks made up only 8% of establishments, but they provided 41% of bed spaces (Visit Aberdeenshire, 2023).

2.2.65 By administrative area, Kincardine & Mearns has the third greatest proportion of the overall bed spaces available in Aberdeenshire, at 19%. Marr has the greatest proportion, at 36%, and Banff and Buchan the second greatest, at 21%. Moreover, in terms of accommodation type, when comparing to the averages for Aberdeenshire, Kincardine & Mearns has a similar proportion of serviced accommodation, a lower proportion of non-serviced accommodation, and a larger proportion of holiday and touring parks (Visit Aberdeenshire, 2023).

2.2.66 Table 2.11 presents the key findings for Aberdeen City in terms of tourism accommodation. As the city is urbanised, there are no holiday and touring parks in the area.

Table 2.11: Tourist Accommodation Aberdeen City (Visit Aberdeenshire, 2024)

	Establishments	Rooms/Pitches	Bed Spaces
Serviced	17%	81%	83%
Non-Serviced	83%	19%	17%
Total	575	7,078	14,234

2.2.67 In Aberdeen City, non-serviced accommodation is the largest contributor to establishments, yet it only provides 19% of rooms and 17% of bed spaces in the city. Of the non-serviced establishments, 78% of these are self-catered accommodation. Although hotels make up only 48% of all serviced establishments, they provide 93% of all serviced bed spaces. This can be explained by hotels in Aberdeen City having an average of 110 rooms, compared to an average of 8 in guest houses and B&Bs (Visit Aberdeenshire, 2024).

Socio-Cultural Community Values

2.2.68 Sociocultural values are the beliefs, values, traditions and habits that influence our everyday behaviour. Within communities, shared sociocultural values can provide a sense of unity and belonging, in addition to supporting the development of Social Capital. Social Capital refers to “the social connections that contribute to people’s quality of life, health, safety, economy and wellbeing in the neighbourhoods where they live” (Scottish Government, 2020).

2.2.69 Aberdeenshire’s values are drawn from the Aberdeenshire Council Vision page, which outlines its goals for community life and service delivery. They aim to help to create and sustain the best quality of life for all through:

- happy, healthy and confident people
- safe, friendly and lively communities
- an enterprising and adaptable economy
- our special environment and diverse culture (Aberdeenshire Council, n.d.).

2.2.70 Aberdeen City and Aberdeenshire are shaped by a strong culture of environmental awareness and community engagement. There is a regional commitment to sustainable growth, responsible land use and biodiversity, as access to nature is a core part of life in the region.

2.2.71 Economically, the region is diverse and resilient. While historically centred on oil and gas, Aberdeen and Aberdeenshire are transitioning toward net-zero technologies, life sciences, and digital innovation, reflecting their own community values. Collectively, Aberdeen City and Aberdeenshire account for 18% of Scotland’s private sector business turnover, ranking second and fourth respectively in terms of private business turnover across Scotland (Invest Aberdeen, 2024). Local businesses play a vital role in maintaining communities and supporting employment across urban and rural areas.

2.2.72 Social capital varies between local authorities (see Table 2.12). There is less variation in how people rate their neighbourhood. The majority of people rate their neighbourhoods as a ‘good’ or ‘very good’ place to live across all of Scotland’s local authorities (Scottish Government, 2024).

Table 2.12: Social Capital and Community Wellbeing 2022 (Scottish Government, 2024)

	Aberdeenshire	Aberdeen City
Adults who rate their neighbourhood as a 'good' or 'very good' place to live.	99%	92%
Adults who 'agreed' or 'strongly agreed' there are places to meet and socialise.	58%	51%
Adults who experienced loneliness.	14%	24%

2.2.73 In the more local area, Kincardine and Mearns, socio-cultural values can be inferred from the priorities set out within local community plans (Aberdeenshire Community Planning Partnership, 2025; Aberdeenshire Council, 2025; Aberdeenshire Community Planning Partnership, 2025). In general, there is an emphasis on community empowerment and spirit, building strong and resilient communities, and promoting community engagement, by ensuring an open dialogue on key concerns.

2.2.74 A key priority of note is the promotion of health-based activities and active travel options, such as walking and cycling. This coincides with goals of making active travel routes, such as foot and cycle paths, more usable and sustainable to support connectivity in the area (Aberdeenshire Community Planning Partnership, 2025). Additionally, the development of outdoor open spaces, open play areas, and recreational facilities were highlighted as areas of importance to the community (Aberdeenshire Community Planning Partnership, 2025).

2.2.75 Table 2.7 shows that the proportion of individuals aged 65+ in the local area is in line with the national average. Table 2.13 shows that the proportion of residents in Mearns and Stonehaven & Lower Deeside with disabilities or long-term health conditions is lower than the national average, with fewer reporting that their day-to-day activities are limited (Scottish Government, 2022).

Table 2.13: Disability

	Mearns	Stonehaven & Lower Deeside	Scotland
Day-to-day activities limited a lot	6.8%	7.0%	10.8%
Day-to-day activities limited a little	12.4%	12.0%	13.3%
Day-to-day activities not limited	80.7%	81.0%	75.9%

2.2.76 Within both Stonehaven & Lower Deeside and Mearns, the most common occupations include Science, Research, Engineering and Technology Professionals and Elementary Administration and Service Occupations. Census data shown in Table 2.14 indicates that educational attainment in Mearns and Stonehaven & Lower Deeside is generally higher than the national average, with a greater proportion of residents holding degree-level qualifications and fewer

having no formal qualifications compared to Scotland overall (Scottish Government, 2022).

Table 2.14: Highest Level of Education (all people aged 16 and over)

	Mearns	Stonehaven & Lower Deeside	Scotland
No Qualifications	13.0%	11.9%	16.7%
Lower School Qualifications	19.9%	17.3%	18.9%
Upper School Qualifications	10.6%	10.6%	11.1%
Apprenticeships	9.7%	8.4%	7.7%
Further Education	13.9%	12.8%	13.2%
Degree-Level	32.9%	38.9%	32.5%

2.2.77 Villages close to the Proposed Development include: Arbuthnott, Benholm, Buckie’s Mill & Newmill, Drumlithie, Gourdon, Inverbervie, Johnshaven, Rickarton and Tannachie.. The demographic of these villages have relatively small populations, with a predominance of older residents and families. The villages of Arbuthnott, Tannachie, Drumlithie, Rickarton, and Benholm are inland, rural villages, whereas Gourdon, Inverbervie and Johnshaven are coastal settlements. These coastal villages benefit from access to the A92 corridor and regular bus services, while inland settlements rely on local road networks and community transport schemes such as A2B dial-a-bus services, as the area has very limited access to rail infrastructure.

2.2.78 A report from a consultation with the residents of Stonehaven, the largest town in the local area, demonstrates that the community value the support of local and independent businesses, the availability and use of community buildings and facilities, and the maintenance and improvement of tourist infrastructure (Aberdeenshire Community Planning Partnership, 2025).

2.2.79 When plans for SSEN-T’s Hurlie Substation(Scottish and Southern Electricity Networks, 2024) were unveiled to local residents in 2023, to be built within the Fetteresso Forest Recreational area, key concerns within the community included the potential impact of construction on: local wildlife and biodiversity, access and recreation, and tourism and local businesses. For instance, specific concerns were raised over the project’s impact on the footpaths and cycle routes through the forest, as these paths were highlighted as integral for community enjoyment, recreation, and health. Some respondents suggested that the area may become less rural and thus less attractive for future families, businesses and visitors (Scottish and Southern Electricity Networks, 2024).

Wellbeing

2.2.80 The wellbeing of the community in the region can be calculated by the WELLBY (Wellbeing-Adjusted Life Years) method. This involves multiplying the life expectancy of an area by its life satisfaction (0-10 scale) to quantify the social welfare of the population.

2.2.81 BiGGAR Economics have produced WELLBY analysis for Aberdeen City and Aberdeenshire in Table 2.15. These scores indicate that the quality of life when measured by the WELLBY method across Aberdeenshire and Aberdeen City combined is greater than Scotland as a whole.

Table 2.15: WELLBY (BiGGAR Economics, 2024)

	Aberdeenshire	Aberdeen City	Combined	Scotland
Life Expectancy (Years)	80.7	79.1	79.9	78.9
Life Satisfaction	7.6	7.4	7.5	7.4
WELLBYs	614	587	602	587

Social Deprivation

2.2.82 The Scottish Index of Multiple Deprivation 2020 (SIMD) consists of seven weighted domains made up of more than 30 indicators of deprivation to inform the final overall SIMD rank. It is an area-based model of deprivation. The domains are income, employment, education, health, access to services, crime and housing (Datamap Scotland, 2025).

2.2.83 Aberdeenshire comprises 340 datazones, with 29% of these datazones ranked in the top 20% least deprived zones in Scotland and 52.4% of the population residing in areas ranked within the top three least deprived SIMD deciles (8-10) (Aberdeenshire Council, 2020). However, pockets of deprivation do exist; the region contains nine datazones that rank within the 20% most deprived nationally. All nine of these zones are located in the towns of Fraserburgh and Peterhead.

2.2.84 Aberdeen City presents a mixed deprivation profile. The area comprises 283 datazones, of which 29 fall within the 20% most deprived areas in Scotland - an increase from 22 datazones in 2016. Additionally, 33.2% of the city’s datazones are situated within the 40% most deprived nationally (Community Planning Aberdeen, 2021). However, Aberdeen City also has a relatively high proportion of datazones (104 zones, or 36.7%) within the 20% least deprived areas of Scotland. Furthermore, 45.3% of the population resides in areas ranked within the three least deprived SIMD deciles (deciles 8 to 10) (Datamap Scotland, 2025).

2.2.85 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. Furthermore, the majority of datazones in Stonehaven, the largest town in the local area, rank in the three least deprived SIMD deciles (8-10) (Datamap Scotland, 2025). Stonehaven is Aberdeenshire’s highest ranking datazone ranked at position 6,959 out of the 6,976 datazones in Scotland (Aberdeenshire Council, 2020). However, there is a small proportion of datazones in the local area ranking in the SIMD decile 6 in addition to the datazones of ‘Mearns South and Benholm – 04’ and ‘Stonehaven South – 02’ which rank relatively low (SIMD deciles of 5 and 4, respectively). This suggests that the local area has some smaller pockets of higher deprivation (Datamap Scotland, 2025).

- 2.2.86 According to comparisons of the SIMD between 2016 and 2020, Aberdeen City’s position has worsened, as the proportion of datazones in the 40% most deprived areas of Scotland increased from 28% to 33.2%. This suggests that inequality of income, education, health and other domains are widening (Community Planning Aberdeen, 2023). There was a similar decline in affluence across Aberdeenshire in this period, as the number of datazones in the 20% least deprived areas in Scotland fell by 6.3% (Aberdeenshire Health and Social Care Partnership, 2024).
- 2.2.87 Similarly, between 2014 and 2020, Aberdeen and Aberdeenshire had the largest declines in adjusted Gross Disposable Household Income (GDHI) per capita in Scotland (Institute for Fiscal Studies, 2023) and between 2015 and 2022, Aberdeenshire experienced an increase in relative child poverty from 7.6% to 12.1% (Aberdeenshire Council, 2024).

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