Socio-Economic Assessment of the Beauly - Blackhillock - New Deer - Peterhead 400kV Overhead Line

A report to Scottish and Southern Electricity Networks Transmission (SSEN Transmission)
September 2025

Contents

1. Executive Summary

1.1. The proposed **Beauly – Blackhillock – New Deer – Peterhead 400kV Overhead Line** is a critical infrastructure project that will support Scotland's transition to Net Zero while delivering a significant economic contribution, estimated to be **£413.2 million Gross Value Added (GVA)** and **4,010 years of employment** across **Scotland**.

1.2. Investment in Scotland's energy infrastructure is essential for advancing the nation towards a sustainable future. As energy generating capacity continues to grow, particularly in the north of Scotland, it is essential to develop and upgrade grid infrastructure to distribute this increased generation.

1.3. In July 2022, the National Energy System Operator (NESO) published the Pathway to 2030 Holistic Network Design (HND)[1], setting out the blueprint for the onshore and offshore electricity transmission network infrastructure required to enable the forecasted growth in renewable electricity across Great Britain. This would provide the necessary capacity to meet the UK and Scottish Government's 2030 offshore wind targets of 50 GW and 11 GW respectively.

1.4. The extensive studies completed to inform the NESO's Pathway to 2030 HND confirmed the requirement to increase the power transfer capacity between Beauly in Highland and Peterhead in Aberdeenshire to enable the significant power transfer capability needed to take power from onshore and large scale offshore renewable generation. This generation which is proposed to connect at onshore locations on the East Coast of Scotland and transport it to areas of demand.

1.5. To achieve this, SSEN Transmission is proposing a new 400kV overhead transmission line (OHL) between Beauly – Blackhillock – New Deer – Peterhead (the 'Proposed Development'). The Proposed Development will also connect into new substations at Beauly (Fanellan 400 kV substation), New Deer (Greens 400 kV substation) and Peterhead (Netherton Hub).

The Proposed Development could generate £41.8 million GVA and support 385 years of employment across the Regional Area.

1.6. In addition to its strategic role, the Proposed Development is expected to support significant employment and economic activity during its development and construction. Under the core scenario (as defined in Section 3.1), it is estimated that

[1] National Grid ESO (July 2022). Pathway to 2030 HND. Available at: https://www.neso.energy/document/262676/download (accessed on 18Sep25)

SSEN Transmission's total investment in the Proposed Development during development and construction could generate:

- **£41.8 million GVA** and **385 years of employment** across the **Regional Area**[2]; and
- **£413.2 million GVA** and **4,010 years of employment** across **Scotland**.

1.7. SSEN Transmission is actively engaged in the delivery of SSE's Just Transition Strategy, which outlines initiatives such as prioritising local procurement, investing in skills development, and increasing contracts awarded to businesses within regional and Scottish economies. As part of its broader Community Wealth Building (CWB) approach, SSEN Transmission seeks to ensure that the benefits of its investment are retained and reinvested locally. This includes support for fair work, local supply chains, and inclusive ownership models through its Supplier Diversity Strategy.

1.8. The scale of the economic impacts from the Proposed Development could be further maximised under the ambition scenario (as defined in Section 3.1), which assumes a higher level of local supply chain involvement. Under this scenario, the development and construction phase could generate:

- **£91.2 million GVA** and **846 years of employment** across the **Regional Area**; and
- **£495.5 million GVA** and **4,931 years of employment** across **Scotland**.

1.9. Additionally, SSEN Transmission's Housing Strategy takes a multi-faceted approach to address workforce needs and create a positive local legacy. Key commitments by 2030 include supporting the development of at least 200 new homes, unlocking up to 1,000 additional homes through long-term leases, and bringing disused properties back into use. This comprehensive strategy not only supports infrastructure delivery but also directly contributes to tackling longer-term housing and depopulation challenges in rural communities.

1.10. The potential impact on tourism and recreation was also assessed in Volume 2, Chapter 14: Recreation and Tourism of the EIA Report. Whilst two significant residual effects identified were during the construction phase, it is not expected that there would be an adverse impact on the tourism economy, or visitor behaviour or spending.

[2] The 'Regional Area' is defined as the combined local authorities of Aberdeenshire, Highland, and Moray.

2. Introduction

2.1. BiGGAR Economics was commissioned by SSEN Transmission to prepare this standalone socio-economic, tourism, and recreation impact assessment for the Proposed Development.

2.2. The assessment is intended to supplement the Environmental Impact Assessment Report (EIAR) for the Beauly – Blackhillock – New Deer – Peterhead 400 kV OHL connection and should be read alongside it.

2.3. It draws on, and should be read in conjunction with, the findings from Chapter 14: Recreation and Tourism within the EIAR.

SSEN Transmission

2.4. Scottish Hydro Electric Transmission plc is the legal entity responsible for owning, operating, and developing the high-voltage electricity transmission system in the north of Scotland. It operates under the name Scottish and Southern Electricity Networks Transmission (SSEN Transmission) and is The Applicant for this project.

2.5. Under the Electricity Act 1989, SSEN Transmission has a statutory duty to develop and maintain an efficient, co-ordinated, and economical transmission system. When reinforcing its network, the company's aim is to deliver an environmentally considerate, technically feasible, and economically viable solution that causes the least disturbance to people and the environment.

Project Background

2.6. To accommodate the growing volume of electricity generated from renewable sources, SSEN Transmission has identified the need for additional high-voltage network capacity to transmit energy from onshore and large-scale offshore renewable generation sites to the areas of demand, necessitating the development of the Proposed Development among other projects across the north of Scotland.

2.7. These projects form part of the Accelerated Strategic Transmission Infrastructure Investment (ASTI) programme. This report focuses exclusively on the Proposed Development and does not assess the other ASTI projects, which are subject to separate applications.

Report Structure

2.8. The remainder of this report is structured as follows:

- **Section 3** considers the economic impact of the Proposed Development;

- **Section 4** sets out the economic impacts generated by the Proposed Development in the strategic and socio-economic context of the region;
- **Section 5** considers tourism drawing on the findings of Chapter 14: Recreation and Tourism;
- **Appendix A** provides the methodology for estimating the economic impact of the Proposed Development; and
- **Appendix B** includes the Socio-Economic Assessment Addendum, a statement from SSEN Transmission providing further information in relation to socio-economic matters.

3. Economic Impacts

3.1. The Proposed Development could generate £413.2 million Gross Value Added (GVA) and support 4,010 years of employment across Scotland.

Capital Investment

3.2. The development and construction of the Proposed Development will involve substantial capital investment, covering the manufacturing, construction, and installation of overhead lines. A portion of this investment, proposed by SSEN Transmission, will be allocated to local, Scottish, and UK companies, leading to increased turnover within these regions.

3.3. SSEN Transmission provided a breakdown of the investment. Based on this, assumptions were made about how the expenditure could be allocated across different categories. For each category, estimates were made regarding the proportion of contracts likely to be secured locally, in Scotland, and in the UK, as well as the sectors these contracts would relate to. These assumptions were informed by SSEN Transmission's experience with similar projects and BiGGAR Economics' expertise in the energy sector.

3.4. For each category, estimates were made regarding the proportion of contracts likely to be secured locally, within Scotland, and across the UK, as well as the sectors these contracts would relate to. Since the Proposed Development runs through Aberdeenshire, Highland and Moray, the economic impacts are presented for the following study areas:

- **Regional Area** (defined as the local authorities of Aberdeenshire, Highland, and Moray);
- **Scotland**; and
- the **UK**.

3.5. The economic impact analysis outlined in this chapter is based on the creation of two supply chain expenditure scenarios, which make assumptions on the location of businesses which are awarded contracts during the development and construction of the Proposed Development. The two scenarios are:

- **Core Scenario**: based on the minimum level of supply chain content that could realistically be achieved locally. This can be considered as a worst-case scenario.
- **Ambition Scenario**: the potential local economic benefits that could be realised from the full implementation of a local supply chain development plan. Under this scenario, a greater proportion of expenditure is retained within the Regional and Scottish economies, reflecting higher levels of local business participation.

3.6. While the total investment remains the same in both scenarios, the ambition scenario retains a greater share of the expenditure within the regional, Scottish, and UK economies. The following section presents the economic impact that could be generated under the core scenario.

Economic Impact: Core Scenario

Development and Construction

3.7. An Input-Output economic model[3] was developed to estimate the economic impact of the Proposed Development. The first step was to consider the direct GVA supported by the Proposed Development. To estimate this, turnover by contract category was divided by a sectoral turnover per GVA ratio, as sourced from the Scottish Annual Business Statistics[4] and the UK Annual Business Survey[5]. Sectoral allocation of contract categories was based on a mapping of each contract against a level 2 Standard Industrial Classification (SIC) code[6].

3.8. It was estimated that the development and construction of the Proposed Development could generate £32.2 million direct GVA in the Regional Area, £243.1 million direct GVA in Scotland, and £403.6 million direct GVA across the UK.

Table 3-1: Core Scenario – Direct GVA by Contract Category (£m)

		Regional Area	Scotland	UK
Enabling Works, Forestry Clearance, and Site Preparation		2.8	11.3	12.0
Public Road Improvements		6.0	23.9	23.9
Overhead Lines	Manufacturing	-	-	121.0
	Construction	13.4	107.4	109.2
	Installation	10.0	99.7	136.0
Policy Costs		-	0.7	1.4
Total Direct GVA		**32.2**	**243.1**	**403.6**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.9. Similarly, the direct employment generated by each of the contract categories was estimated by dividing the turnover of each contract by the relevant sectoral turnover per job ratio. It was estimated that the development and construction of the

[3] More information provided in Appendix A: Methodology.
[4] Scottish Government (2023), Scottish Annual Business Statistics 2021.
[5] UK Government (2024), UK Annual Business Survey 2022.
[6] Office for National Statistics (2009), UK Standard Industrial Classification of Economic Activities 2007 (SIC 2007).

Proposed Development could support 296 direct years of employment[7] in the Regional Area, 2,301 direct years of employment[8] in Scotland, and 3,930 direct years of employment across the UK.

Table 3-2: Core Scenario – Direct Employment by contract Category (Years of Employment)

		Regional Area	Scotland	UK
Enabling Works, Forestry Clearance, and Site Preparation		28	111	114
Public Road Improvements		48	191	191
Overhead Lines	Manufacturing	-	-	1,330
	Construction	104	836	856
	Installation	116	1,156	1,427
Policy Costs		-	7	12
Total Direct Employment		**296**	**2,301**	**3,930**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.10. To estimate the indirect (supply chain) and induced (staff spending) impacts, it was necessary to multiply the direct GVA, and direct employment supported by each contract category by the relevant sectoral GVA and employment Type 1 and Type 2 economic multipliers[9].

3.11. It was estimated the GVA impact associated with the multiplier effects could generate £9.6 million GVA in the Regional Area, £170.1 million GVA in Scotland, and £664.5 million GVA across the UK.

Table 3-3: Core Scenario – Multiplier GVA (£m)

	Regional Area	Scotland	UK
Indirect GVA	5.9	101.5	362.8
Induced GVA	3.7	68.5	301.7
Total Multiplier GVA	**9.6**	**170.1**	**664.5**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

[7] A measure of employment used for temporary employment, such as jobs supported during a construction phase. One 'year of employment' is equivalent to one full-time equivalent (FTE) job lasting for one year.

[8] A measure of employment used for temporary employment, such as jobs supported during a construction phase. One 'year of employment' is equivalent to one full-time equivalent (FTE) job lasting for one year.

[9] More details on the methodology are provided in the Appendix A: Methodology.

3.12. It was estimated the employment impact associated with the multiplier effects could support 89 years of employment in the Regional Area, 1,709 years of employment in Scotland, and 6,403 years of employment across the UK.

Table 3-4: Core Scenario – Multiplier Employment (Years of Employment)

	Regional Area	Scotland	UK
Indirect Employment	56	1,015	3,467
Induced Employment	34	694	2,936
Total Multiplier Employment	**89**	**1,709**	**6,403**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.13. The combined direct, indirect, and induced impacts of the development and construction of the Proposed Development are estimated to generate a total of £41.8 million GVA and 385 years of employment in the Regional Area, £413.2 million GVA and 4,010 years of employment in Scotland, and £1,068.1 million GVA and 10,334 years of employment across the UK.

Table 3-5: Core Scenario – Total GVA (£m) and Employment Impact (Years of Employment)

	Regional Area	Scotland	UK
Total GVA	**41.8**	**413.2**	**1,068.1**
Total Employment	**385**	**4,010**	**10,334**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

Operation and Maintenance and Decommissioning

3.14. A quantitative economic impact assessment has not been undertaken for the operational and decommissioning phases of the project.

3.15. The annual expenditure during the operation and maintenance phase, which includes routine servicing and inspections, requires substantially fewer resources and personnel than the construction phase. Consequently, the economic activity supported is of a much smaller order of magnitude.

3.16. Similarly, a detailed assessment of the decommissioning phase has not been included. As this will take place over 35 years in the future, the methods, costs, and supply chain opportunities are too uncertain to allow for a meaningful quantitative analysis at this stage.

Maximising Local Supply Chain Content

3.17. The scale of the economic impacts from the Proposed Development and construction of the Proposed Development could be maximised. The recommendations outlined include both sectoral guidance and suggestions to maximise impact in both the short and long term.

Sectoral Guidance

3.18. Grid infrastructure plays a crucial role in delivering clean, affordable energy and is key to achieving a just transition to net zero. In addition to reducing emissions, renewable energy developments offer significant potential for driving local economic growth. However, to fully realise these local benefits, developers and stakeholders must actively aim for a high level of local content in their projects.

3.19. To support this objective, guidance has been developed to help developers maximise local economic benefits. A key resource is RenewableUK's Local Supply Chain in Onshore Wind: Good Practice Guide. While this guidance is aimed at onshore wind developments, many of the principles – such as early contractor engagement, transparent procurement processes, and investment in local skills – are equally applicable to grid infrastructure projects.

3.20. Given the scale of investment and long-term nature of grid infrastructure, there is a strong case for these projects to adopt similar good practice approaches to ensure that local supply chains, communities, and workforces benefit. As critical enablers of the transition to net zero, grid infrastructure projects have a responsibility not only to deliver technical outcomes, but also to contribute positively to local and regional economies – just as renewable generation projects are increasingly expected to do.

3.21. The 'Good Practice Guide' provides the following recommendations:

- maximise local presence and start early: begin identifying potential local suppliers as early as possible by engaging and maintaining visibility in the community;
- leverage partnerships: collaborate with local business groups and authorities to enhance opportunities;
- act as an enabler: use information on local suppliers to ensure primary contractors prioritise local opportunities;
- provide timely information: adopt an iterative communication process with businesses, allowing them time to adapt and respond to opportunities;
- communicate technical requirements early: this allows local businesses time to upskill or form consortia where necessary; and
- demonstrate local content in planning: where feasible, include a clear commitment to local content in planning submissions and perform post-project audits.

3.22. While these principles are broadly applicable, developers can amplify their local economic impact by implementing more targeted actions, depending on whether the interventions are short- or long-term.

3.23. Some of these initiatives can be integrated quickly, delivering immediate benefits to the local supply chain content of the Proposed Development. Others require more time and engagement across a wider range of stakeholders, but they offer the potential for substantial future benefits.

Maximising Economic Benefits in the Short Term

3.24. In the short term, the focus should be on areas with the greatest potential for regional content, particularly within construction and installation contracts. Key actions include:

- prioritising regional and Scottish content during the Tier 1 tendering process;
- collaborating with Tier 1 suppliers to open opportunities for new entrants in the sector, especially businesses with experience in other industries that could transition to these contracts;
- developing an online portal to advertise all contracts associated with the Proposed Development; and
- engaging local communities to identify job opportunities that could be filled by local workers during the construction phase.

Maximising Economic Benefits in the Long Term

3.25. In the long term, efforts should focus on building a local supply chain in areas where current capacity is limited within the local area, and Scotland as a whole. Gathering data can help establish a baseline, enabling future projects to set higher targets for local content. Key long-term actions include:

- integrating Scottish content requirements into the Tier 1 tender process, encouraging suppliers to estimate the proportion of Scotland-based content. While this need not be a scored element, it can promote early-stage consideration of local content;
- formalising reporting requirements for Tier 1 suppliers to track their use of local and Scottish content;
- requiring Tier 1 contractors to support local skills development through initiatives such as apprenticeships; and
- evaluating the effectiveness of both developer and Tier 1 contractor engagements to inform and improve future projects.

Conclusion

3.26. While it may not always be possible to maximise local supply chain content in every area of delivery, developers can and should take reasonable steps to increase the involvement of local, regional, and Scottish businesses where feasible. By implementing practical short-term actions and supporting long-term supply chain development, the construction and installation of the Proposed Development can contribute meaningfully to local economic activity and employment.

3.27. The level of local content ultimately achieved will depend on a range of factors, including market readiness, supplier capacity, and procurement constraints. However, by doing what is reasonably possible to support local content – through early engagement, transparent processes, and targeted support – developers can help increase the level of local supply chain content.

3.28. The following section presents the ambition scenario, which illustrates the potential scale of economic impact that could be achieved if a proactive local supply chain development approach were fully implemented.

Economic Impact: Ambition Scenario

Development and Construction

3.29. Implementing these recommendations is expected to result in an increase in contracts awarded to businesses within the regional and Scottish economies. This would increase the proportion of the economic benefits that would be retained within these economies.

3.30. The economic impact analysis of the ambition scenario follows an identical modelling process as the core scenario, but with a greater proportion of the development and construction expenditure apportioned to the regional and Scottish economies.

3.31. Estimates based on the same method indicate that under the ambition scenario, the development and construction of the Proposed Development could generate £70.4 million in direct GVA in the Regional Area, £293.4 million in Scotland, and £524.6 million across the UK.

Table 3-6: Ambition Scenario – Direct GVA by Contract Category (£m)

		Regional Area	Scotland	UK
Enabling Works, Forestry Clearance, and Site Preparation		5.7	11.3	12.0
Public Road Improvements		12.0	23.9	23.9
Overhead Lines	Manufacturing	-	50.3	242.1
	Construction	29.5	107.4	109.2
	Installation	23.3	99.7	136.0
Policy Costs		-	0.7	1.4
Total Direct GVA		**70.4**	**293.4**	**524.6**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.32. Similarly, under the ambition scenario it was estimated that the development and construction of the Proposed Development could support 651 direct years of employment in Regional Area, 2,887 direct years of employment in Scotland, and 5,260 direct years of employment across the UK.

Table 3-7: Ambition Scenario – Direct Employment by contract Category (Years of Employment)

		Regional Area	Scotland	UK
Enabling Works, Forestry Clearance, and Site Preparation		56	111	114
Public Road Improvements		96	191	191
Overhead Lines	Manufacturing	-	586	2,660
	Construction	230	836	856
	Installation	270	1,156	1,427
Policy Costs		-	7	12
Total Direct Employment		**651**	**2,887**	**5,260**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.33. It was estimated under the ambition scenario that the GVA impact associated with the multiplier effects could generate £20.8 million GVA in the Regional Area, £202.2 million GVA in Scotland, and £867.5 million GVA across the UK.

Table 3-8: Ambition Scenario – Multiplier GVA (£m)

	Regional Area	Scotland	UK
Indirect GVA	12.7	118.0	465.8
Induced GVA	8.0	84.1	401.7
Total Multiplier GVA	**20.8**	**202.2**	**867.5**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.34. It was estimated under the ambition scenario the employment impact associated with the multiplier effects could support 196 years of employment in the Regional Area, 2,045 years of employment in Scotland, and 8,303 years of employment across the UK.

Table 3-9: Ambition Scenario – Multiplier Employment (Years of Employment)

	Regional Area	Scotland	UK
Indirect Employment	121	1,199	4,370
Induced Employment	75	845	3,933
Total Multiplier Employment	**196**	**2,045**	**8,303**

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

3.35. The combined direct, indirect, and induced impacts under the ambition scenario of the development and construction of the Proposed Development are estimated to generate a total of £91.2 million GVA and 846 years of employment in the Regional Area, £495.5 million GVA and 4,931 years of employment in Scotland, and £1,392.1 million GVA and 13,563 years of employment across the UK.

Table 3-10: Ambition Scenario – Total GVA (£m) and Employment Impact (Years of Employment)

	Regional Area	Scotland	UK
Total GVA	91.2	495.5	1,392.1
Total Employment	846	4,931	13,563

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

4. Impacts in Context

4.1. The Proposed Development will generate economic opportunities across Aberdeenshire, Highland and Moray, and has the opportunity to drive progress towards the strategic priorities.

Key Socio-Economic Indicators

Study Areas

4.2. Since the Proposed Development runs through multiple local authorities, this section considers the socio-economic structure of the following study areas:

- **Regional Area** (defined as the local authorities of Aberdeenshire, Highland, and Moray); and
- **Scotland**.

4.3. Given the nature of the Proposed Development, it is important to note that while the socio-economic analysis considers the broader context of the surrounding areas, the Proposed Development itself is confined to a narrow corridor running through these study areas. As such, the socio-economic structure may vary within the wider study areas compared to the immediate vicinity of the Proposed Development.

Population Estimates

4.4. In 2023, the Regional Area had a population of 595,300, accounting for 10.8% of Scotland's total population of 5,490,100.

4.5. The working-age population (aged 16-64) across the Regional Area accounted for 60.2% of the population, lower than the proportion across Scotland as a whole (63.4%). In the same year, 22.9% of the population across the Regional Area was over the age of 65, exceeding the national average of 20.3%.

Table 4-1: Population Estimates, 2023

	Regional Area	Scotland
Total	**595,300**	**5,490,100**
0-15	16.9%	16.3%
16-64	60.2%	63.4%
65+	22.9%	20.3%

Source: National Records of Scotland (2024), Mid-2023 Population Estimates.

Population Projections

4.6. Over the period of 2023 to 2043, the population of the Regional Area is expected to decrease by 0.2%, a decrease of approximately 1,300 people. Over the same period, the population of Scotland as a whole is projected to increase by 5.1%, to approximately 5.8 million.

4.7. By 2043, the share of the working-age population across the Regional Area is projected to fall by 3.8 percentage points (equivalent to the reduction of approximately 23,200 people), while the share of those aged 65+ is projected to increase by 5.6 percentage points.

4.8. Scotland is predicted to follow a similar but less marked trend, with the share of the population age 16 to 64 projected to decrease by 2.3 percentage points, and the share of those aged 65+ projected to rise by 4.5 percentage points.

4.9. These demographic trends suggest that a declining working-age population will have to support an increasingly ageing population, and it is therefore crucial for the Regional Area to attract and retain working-age individuals.

Table 4-2: Population Projections, 2023-2043

	Regional Area		Scotland	
	2023	**2043**	**2023**	**2043**
Total	**595,300**	**594,000**	**5,490,100**	**5,770,200**
0-15	16.9%	15.0%	16.3%	14.1%
16-64	60.2%	56.4%	63.4%	61.1%
65+	22.9%	28.5%	20.3%	24.8%

Source: National Records of Scotland (2024), Mid 2023 Population Estimates; National Records of Scotland (2020), Population Projections for Scottish Areas (2018-based); National Records of Scotland (2025), Projected Population of Scotland (2022-based).

Industrial Structure

4.10. As illustrated in Table 4-3, in 2023 the highest proportion of employment across the Regional Area was in wholesale and retail trade, accounting for 13.7% of total employment. Employment in this sector was slightly overrepresented in the Regional Area compared to Scotland as a whole (13.2%).

4.11. Of those working in the Regional Area, 6.3% were employed in the construction industry, greater than the average across Scotland (5.1%). This sector is one of the primary areas of opportunity for contracts associated with the construction phase of the Proposed Development.

4.12. The electricity, gas, steam and air conditioning sector employs the same proportion of the population across the Regional Area as Scotland as a whole (0.7%).

4.13. The share of employment in the professional, scientific and technical activities sector, usually associated with project development activity, is slightly underrepresented across the Regional Area (6.6%), compared to the Scottish average (7.2%).

Table 4-3: Industrial Structure, 2023

	Regional Area	Scotland
Wholesale and retail trade	13.7%	13.2%
Human health and social work activities	12.7%	15.6%
Agriculture, forestry and fishing	11.1%	3.4%
Accommodation and food service activities	9.3%	8.6%
Manufacturing	8.9%	6.7%
Education	7.6%	8.2%
Professional, scientific and technical activities	6.6%	7.2%
Construction	6.3%	5.1%
Transportation and storage	4.5%	4.5%
Administrative and support service activities	4.5%	6.8%
Public administration and defence	4.2%	6.2%
Arts, entertainment and recreation	2.7%	2.7%
Information and communication	1.5%	3.1%
Other service activities	1.4%	1.7%
Mining and quarrying	1.3%	0.9%
Water supply activities	1.2%	0.8%
Real estate activities	1.1%	1.5%
Electricity, gas, steam and air conditioning supply	0.7%	0.7%
Financial and insurance activities	0.6%	3.2%
Total Employment	**278,300**	**2,657,000**

Source: ONS (2025), Business Register and Employment Survey, 2023.

Economic Activity

4.14. Across the Regional Area, the unemployment rate was 2.1%, lower than the Scottish average of 3.2%. Additionally, the region's economic activity rate was 81.2%, higher than the rate across Scotland as a whole, which stood at 77.0%.

4.15. Table 4-4 also shows that the median annual gross wage for residents across the Regional Area was £30,503, which is slightly below the national average of £31,891.

Table 4-4: Labour Market Indicators, 2024

	Regional Area	Scotland
Economically Active (%)	81.2%	77.0%
Unemployment Rate (%)	2.1%	3.2%
Median Annual Gross Wage (resident analysis)	£30,503	£31,891

Source: ONS (2025), Annual Population Survey Jan 2024 – Dec 2024; ONS (2025) Model-Based Estimates of Unemployment Jan 2024 – Dec 2024; ONS (2025), Annual Survey of Hours and Earnings – resident analysis (data for 2024).

Education

4.16. As illustrated in Table 4-5, across the Regional Area, 52.8% of people have achieved a Level 4 Regulated Qualification Framework (RQF), equivalent to a higher education certificate. This is slightly lower than the share across Scotland as a whole (54.5%).

4.17. The proportion of people who have achieved no qualifications across the Regional Area (6.9%) is lower than across Scotland as a whole (8.0%).

Table 4-5: Qualification Levels, 2024

	Regional Area	Scotland
RQF4+	52.8%	54.5%
RQF3+	72.2%	72.5%
RQF2+	89.2%	87.4%
RQF1+	90.3%	88.6%
Other Qualifications	2.7%	3.4%
No Qualifications	6.9%	8.0%

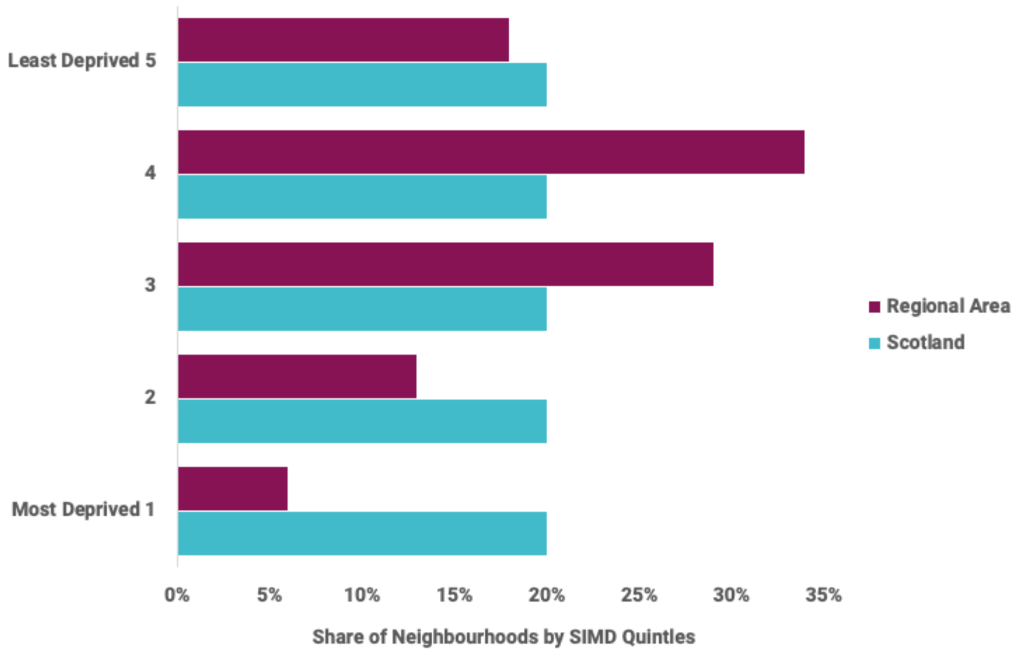
Source: ONS (2025), Annual Population Survey Jan 2024 – Dec 2024.

Scottish Index of Multiple Deprivation

4.18. The Scottish Index of Multiple Deprivation (SIMD) is a relative measure of deprivation which ranks small areas across seven dimensions: income, employment, education, health, access to services, crime and housing. These areas can be ranked based on which quintile (fifth of the distribution) they belong to, with a small area in the first quintile being in the 20% most deprived areas in Scotland.

4.19. The Regional Area is made up of 778 small areas. As shown Figure 4-1, 6% of the small areas are located in the most deprived quintile, and 13% are in the second. Most of the small areas in the Regional Area are clustered in the middle to upper distribution with 34% being in the fourth quintile and 29% in the third.

Figure 4-1: SIMD Distribution of Study Areas



Source: Scottish Government (2020), Scottish Index of Multiple Deprivation 2020.

Fuel Poverty

4.20. Scottish legislation defines a household as being in fuel poverty when more than 10% (or 20% for extreme fuel poverty) of income is required to pay for heating[10]. As illustrated in Table 4-6, fuel poverty statistics have been segregated by local authority due to the notable differences between them. A rate is also provided for the Regional Area, to offer a broader context of the surrounding areas.

4.21. Whilst the latest available data has been used, it is likely, given the rise in energy prices beginning in 2022, that there has been a further increase in the number of households that are in fuel poverty.

4.22. The proportion of people living in fuel poverty is 24% in Aberdeenshire, 33% in Highland, and 32% in Moray. The rate for the Regional Area is 29%, four percentage points greater than the Scottish average of 25%.

4.23. In Aberdeenshire, 15% of households experience extreme fuel poverty, while the rate in Highland is 22%, and 19% in Moray. This results in a rate of 18% for the Regional Area, which is six percentage points above the national average of 12%.

4.24. Residents aged 65 and older are particularly vulnerable to fuel poverty, as they are more likely to be living on a fixed income, spending long periods of time at home, and living in substandard housing. Given that the population demographics of the Regional Area show that this age group is overrepresented and is projected to

[10] Scottish Government (2021). Home Energy and Fuel Poverty.

increase over the next two decades, fuel poverty is likely to be an ongoing challenge for the Regional Area.

Table 4-6: Fuel Poverty, 2019

	Aberdeenshire	Highland	Moray	Regional Area	Scotland
Fuel Poverty	24%	33%	32%	29%	25%
Extreme Fuel Poverty	15%	22%	19%	18%	12%

Source: Scottish Government (2021), Scottish House Condition Survey: Local Authority Analysis 2019.

Community Wealth Building

4.25. Community Wealth Building (CWB) is an internationally recognised model that aims to strengthen local economies by keeping wealth circulating within communities. The approach is based on five interconnected pillars[11]:

- **Inclusive Ownership**: Supporting the development of local and social enterprises that generate community wealth. SSEN Transmission's Supplier Diversity Strategy plays a key role in encouraging diverse and inclusive supply chains.
- **Spending**: Enhancing local procurement by encouraging contractors to engage local suppliers, promote fair work, and support shorter supply chains. Principal Contractors are required to develop social value plans with clear community benefit targets.
- **Workforce**: Promoting fair work and developing local labour markets. SSEN Transmission is a Real Living Wage, Living Hours, and Living Pensions employer and extends these standards to its wider contractor base. Its Sustainable Workforce Strategy embeds inclusion and diversity, supported by annual employee feedback surveys.
- **Land and Property**: Increasing the social, ecological, and economic value that communities derive from land and infrastructure assets. SSEN Transmission's Housing Strategy reflects this pillar, with a commitment to deliver hundreds of new homes by 2030 in partnership with local housing organisations.
- **Finance**: Ensuring investment flows benefit local communities. This includes directing economic value into community-led initiatives via the Community Benefit Fund.

[11] See Centre for Local Economic Strategies - https://cles.org.uk/community-wealth-building/how-to-build-community-wealth/ (accessed on 18Sep25)

4.26. Both segregated and combined community wealth building indicators have been provided in Table 4-7 to illustrate a more comprehensive overview of Aberdeenshire, Highland, and Moray.

4.27. The number of social enterprises significantly differs across the three local authorities, with Highland reporting 24 social enterprises per 10,000 of the population, compared to Aberdeenshire and Moray reporting 11 and 15, respectively. Across the Regional Area, the number of social enterprises per 10,000 of the population is 17, greater than the Scotland-wide rate of 11.

4.28. Similarly, the proportion of community land ownership also varies significantly across the three local authorities. Highland reports a proportion of 1.96% [12] community land ownership, significantly greater than Aberdeenshire and Moray, with a proportion of 0.09% and 0.28%, respectively. It is therefore important to increase community land ownership across Aberdeenshire and Moray to help retain wealth locally in these regions.

4.29. The gender pay gap across the Regional Area (12.3%) is greater than the Scottish average of 8.2%, with Highland reporting the largest gap of 13.2% compared to 14.4% in Aberdeenshire and 8.9% in Moray.

4.30. Additionally, 14.6% of employees in Moray earn below the real living wage, a figure notably higher than the 9.6% in Highland and 12.4% in Aberdeenshire. In aggregation, 11.6% of employees earn below the real living wage across the Regional Area, compared to the Scottish average of 11.4%. These statistics illustrate that there may be comparatively limited opportunities for fair employment in the region, particularly in Moray.

4.31. Of those living in Aberdeenshire, 24.4% feel that they have an influence over local decisions, comparable to 20.6% in Moray, and 17.8% of people across Scotland who feel this way[13]. Highland reported that only 14.2% of people who feel this way in the region.

4.32. Whilst this data doesn't fully cover the CWB pillars, it does suggest that there is an opportunity to develop CWB in conjunction with local anchors institutions across the Regional Area.

[12] Community Ownership in Scotland 2022, Scottish Government (2022) - https://www.gov.scot/publications/community-ownership-in-scotland-2022/documents/ (accessed on 18Sep25)

[13] Wellbeing Economy Monitor: Excel Tool – Updated July 2023 - https://www.gov.scot/publications/wellbeing-economy-toolkit-supporting-place-based-economic-strategy-policy-development/documents/ (accessed on 18Sep25)

Table 4-7: Community Wealth Building Indicators

	Aberdeenshire	Highland	Moray	Regional Area	Scotland
Social enterprises per 10,000 of the population (2021)	11	24	15	17	11
Community land ownership (2023)	0.09%	1.96%	0.28%	0.87%	2.68%*
Gender pay gap (2024)	14.4%	13.2%	8.9%	12.3%	8.2%
Employees earning below the real living wage % (2023)	12.4%	9.6%	14.6%	11.6%	11.4%
Influence over local decisions (2022)	24.4%	14.2%	20.6%	19.7%	17.8%

Source: Community Ownership in Scotland 2022, Scottish Government (2022); Wellbeing Economy Monitor: Excel Tool. *Note: (0.13% excl. Outer Hebrides). *Data unavailable for Dundee City.

Wellbeing

4.33. One way of gauging the social welfare of a local area is through calculating the Wellbeing-Adjusted Life Years, known as WELLBYs. WELLBYs are calculated by multiplying life expectancy of an area by its average self-reported life satisfaction on a 0 to 10 scale[14]. WELLBYs can be compared and contrasted across Scotland and the UK.

4.34. Underpinning this approach is the 2021 World Happiness Report, Layard and Oparina[15], which makes the case that people want to experience lives that are both long and happy. With that in mind, they advocate that a society should aim to maximise the number of WELLBYs across their population both now and in the future. That is, maximising a combination of both life expectancy and self-reported wellbeing.

4.35. As shown in Table 4-8, the combined life expectancy for the Regional Area is 80.2 years, greater than the Scottish average of 78.8 years. Additionally, the Regional Area reports a life satisfaction score of 7.7, which is slightly higher than the national

[14] BiGGAR Economics (2023). Toward a Wellbeing Economy: The Distribution of Wellbeing in the UK.
[15] Layard, R. and Oparina, E (March 2021)., Living Long and Living Well: The WELLBY Approach, Chapter 8 of World Happiness Report 2021 (Sustainable Development Solutions Network).

average of 7.4. This gives the Regional Area an overall WELLBY score of 615, which is greater than the Scottish average of 587.

Table 4-8: WELLBYs

	Aberdeenshire	Highland	Moray	Regional Area	Scotland
Life expectancy (years)	80.7	79.7	80.4	80.2	78.8
Life satisfaction	7.6	7.8	7.5	7.7	7.4
WELLBYs	614	620	602	615	586

Source: BiGGAR Economics (2025). Toward a Wellbeing Economy: The Distribution of Wellbeing in the UK. Totals may not sum due to rounding.

4.36. Self-reported life satisfaction, and consequently WELLBY scores, are dependent upon a variety of factors, including local economic conditions, community vitality and involvement, as well as culture and the natural environment.

4.37. While the WELLBY score demonstrates that the quality of life in the region is greater than Scotland as a whole, it is important to consider indicators of wellbeing across each local authority, as illustrated by Table 4-9.

4.38. For example, 74% of those living in the Regional Area, consider themselves to have good or very good health, which is greater than the national average of 72%. Additionally, both Highland and Moray perform particularly well in regard to the proportion of residents living within a 5-minute walk of a green or blue space, reporting 74% and 78% respectively, compared to the Scottish average of 70%.

4.39. Other indicators of wellbeing are less favourable across the Regional Area. In particular, at a combined rate of 10.4 tonnes of CO2 per capita, greenhouse gas emissions are higher across the Regional Area compared to the Scottish average of 7.4 tonnes of CO2 per capita. Emissions are particularly high in Aberdeenshire, at 11.4 tonnes per capita. As such, improvements to wellbeing are still important.

4.40. More generally, with respect to the National Performance Framework, Scotland's wellbeing framework, both Aberdeenshire and Highland, exhibit a particularly strong wellbeing performance on health outcomes, whilst Moray performs strongly on community outcomes.

Table 4-9: Wellbeing Indicators

	Aberdeenshire	Highland	Moray	Regional Area	Scotland
Mental health (WEMWBS, 2018-2022)	49.6	49.6	49.7	49.6	48.9
Suicides per 100,000 (2019-2023)	12.1	20.0	14.8	15.7	13.9
Good or very good health (2018-2022)	76%	71%	75%	74%	72%
Feelings of loneliness some or most of the time (2022)	14%	19%	25%	18%	23%
Within a 5-minute walk of a green or blue space (2023)	71%	74%	78%	74%	70%
Children living in low-income families (2024)	9.3%	18.9%	20.4%	16.2%	16.3%
Low or no qualifications (2022)	9.6%	8.9%	5.9%	8.7%	9.9%
Very low physical activity levels (2018-2022)	16%	19%	21%	18%	20%
Greenhouse gas emissions (tonnes of CO2 per capita, 2022)	10.7	10.1	8.6	10.4	7.1

Source: Community Ownership in Scotland 2022, Scottish Government (2022); Wellbeing Economy Monitor: Excel Tool, Public Health Scotland, Scottish Health Survey.

Conclusions

4.41. The socio-economic profile of the Regional Area highlights several key trends that may influence how the economic impacts of the Proposed Development are realised. Demographic projections show a declining working-age population alongside an increasing share of older residents, suggesting that retaining and attracting skilled workers will be important for sustaining long-term economic activity.

4.42. The area benefits from high levels of economic participation and relatively low levels of deprivation, indicating good potential to engage local suppliers and workers – particularly in sectors relevant to the Proposed Development, such as construction. However, there are also notable challenges, including elevated levels of fuel poverty, especially in Highland.

UK Strategic Context

4.43. This section outlines the primary strategies that support the UK Government's energy ambitions as well as its broader socio-economic objectives. These include:

- Build Back Better: Our Plan to Growth;
- Net Zero Strategy: Build Back Greener; and
- Strategy and Policy Statement for Energy Policy in Great Britain.

4.44. Overall, the Proposed Development will support a considerable number of the key priority areas of these national strategies, including:

- supporting the delivery of a just transition;
- enabling net zero infrastructure;
- supporting the security of domestic energy production;
- improving the long-term sustainability of the UK's energy systems; and
- enhancing inclusive growth across the regions of the UK.

Build Back Better: Our Plan to Growth

4.45. In 2021, the UK Government introduced its "Build Back Better" economic growth plan, replacing the previous industrial strategy. This new plan reflects the evolving economic environment and aims to create growth in both new and emerging industries, as well as in established sectors across the UK. The plan is built on three key pillars of investment – infrastructure, skills, and innovation. The strategy notes that all growth generated must be inclusive and equal and aims to:

- level up the whole of the UK;
- support the transition to net zero; and
- support vision for Global Britian.

4.46. The strategy highlights opportunities in achieving net zero for economic growth and job creation across the country. Additionally, the UK industrial base provides a strong foundation for securing new market opportunities arising from the transition to net zero.

Net Zero Strategy: Build Back Greener

4.47. Following the recommendations made by the UK Climate Change Committee in 2019, the UK Government legislated a net zero emissions target for 2050. The UK's

Net Zero Strategy[16] sets out policies and proposals for decarbonising all sectors of the UK economy to meet this target.

4.48. The strategy consistently emphasises that achieving carbon neutrality across various sectors requires the electrification of economic activity. Whilst this is not true for all industries, the strategy highlights that the supply of electricity will need to increase considerably by 2050 to match demand, with an increasing share from renewables.

4.49. The strategy acknowledges that increasing electricity generation will rely on transforming the infrastructure needed to deliver them, including building out a flexible grid. By supporting the electrification of the energy system, the Proposed Development will play a strategic role in providing the transmission infrastructure necessary for the UK to transition to Net Zero.

Strategy and Policy Statement for Energy Policy in Great Britain

4.50. In 2024, the UK Government published the Strategy and Policy Statement for Energy Policy in Great Britain. This statement complements key publications, including the Net Zero Strategy[17], British Energy Security Strategy[18], and the Transmission Acceleration Plan[19]. It aims to provide guidance to the energy sector on the actions and decisions needed to achieve the government's policy goals, emphasising areas where a strategic shift in the energy industry is expected.

4.51. 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.

4.52. The strategy acknowledges that, in order to enable clean energy deployment and meet the demands of a decarbonised energy system, a network infrastructure needs to be built at scale and pace. Additionally, it prioritises building reliable and sustainable network infrastructure that is effectively connected to broader markets.

NESO Clean Power 2030

4.53. The National Energy System Operator's (NESO) Clean Power 2030[20] outlines a strategic pathway for delivering a decarbonised electricity system by 2030. It sets

[16] UK Government (2021) Net Zero Strategy: Build Back Greener (accessed on 18Sep25)
[17] Department for Energy Security and Net Zero (2021) Net Zero Strategy: Build Back Greener (accessed on 18Sep25)
[18] Department for Energy Security and Net Zero (2022) British Energy Security Strategy (accessed on 18Sep25)
[19] Department for Energy Security and Net Zero (2023) The Transmission Acceleration Plan. (accessed on 18Sep25)
[20] National Energy System Operator (2024). Clean Power 2030. (accessed on 18Sep25)

out 25 specific actions across six key areas aimed at accelerating the transition to a clean energy system. These include improving electricity system operability, enhancing infrastructure delivery, and enabling more efficient markets and investment signals.

4.54. A central theme of the plan is the urgent need to expand and reinforce the electricity grid to accommodate the forecast growth in renewable generation and electrified demand. The plan recognises the importance of rapid infrastructure development and calls for coordinated action across industry, government, and regulators to deliver timely and cost-effective grid upgrades.

4.55. NESO's Clean Power 2030 strategy is a key part of the UK's broader strategy to ensure a reliable, flexible, and net zero electricity system. The Proposed Development aligns with the plan's objectives by supporting the scale and pace of transmission infrastructure needed to deliver clean power across the UK.

Scotland's Strategic Context

4.56. The Proposed Development will support several national strategies, including:

- Scotland's National Performance Framework;
- Programme for Government 2024-25: Serving Scotland;
- Scotland's National Strategy for Economic Transformation;
- National Planning Framework (NPF) 4;
- Green Industrial Strategy 2024; and
- Tourism Strategy: Scotland's Outlook 2030.

4.57. Overall, the Proposed Development would support a considerable number of the key priority areas of these national strategies, particularly Scotland's focus of improving sustainability and the transition to Net Zero by:

- enabling the increased generation, transmission and utilisation of renewable electricity throughout Scotland and the rest of the UK;
- investing in essential infrastructure;
- generating economic benefit in the form of GVA and job creation;
- supporting wider skills development;
- aiding population attraction and retention through job opportunities;
- developing and utilising the local businesses and supply chain; and
- enhancing inclusive growth in communities, through improved economic productivity in rural and deprived areas.

Scotland's National Performance Framework

4.58. The National Performance Framework[21] sits at the top of the policy hierarchy in Scotland, with all other policies and strategies designed to meet its purpose and outcomes. The purpose of the National Performance Framework is "to focus on

[21] Scottish Government (2023), Scotland's National Performance Framework (accessed on 18Sep25)

creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing, and sustainable and inclusive economic growth".

4.59. The National Performance Framework is designed to give a more rounded view of economic performance and progress towards achieving sustainable and inclusive economic growth and well-being across Scotland and 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.

4.60. The National Performance Framework sets out 11 outcomes, underpinned by 81 indicators, that combine to give a better picture of how the country is progressing towards these goals. As well as Gross Domestic Product (GDP) and employment measures, the Framework's outcomes reflect the desired fabric of communities and culture, education, the environment, health and well-being and measures to help tackle poverty. It is these indicators on which the Scottish Government focuses its activities and spending to help meet the national outcomes.

4.61. The 11 national outcomes are that people:

- **children and young people**: grow up loved, safe and respected so that they realise their full potential;
- **communities**: live in communities that are inclusive, empowered, resilient and safe;
- **culture**: are creative and their vibrant and diverse cultures are expressed and enjoyed widely;
- **economy**: have a globally competitive, entrepreneurial, inclusive and sustainable economy;
- **education**: are well educated, skilled and able to contribute to society;
- **environment**: value, enjoy, protect and enhance their environment;
- **fair work and business**: have thriving and innovative businesses, with quality jobs and fair work for everyone;
- **health**: are healthy and active;
- **human rights**: respect, protect and fulfil human rights and live free from discrimination;
- **international**: are open, connected and make a positive contribution internationally; and
- **poverty**: tackle poverty by sharing opportunities, wealth and power more equally.

Programme for Government 2024-25: Serving Scotland

4.62. Published in September 2024, the Programme for Government[22] sets out the Scottish Government's commitments with the purpose of improving peoples' lives by focusing on four clear priorities, including:

- eradicating child poverty;
- growing the economy;
- tackling the climate emergency; and
- ensuring high quality and sustainable public services.

4.63. The programme outlines key initiatives under each of the four priorities, several with relevance to the Proposed Development. In particular, the Scottish Government highlights the economic opportunities associated with the path to Net Zero, and the importance of creating the right enabling environment to support businesses which generate jobs and wealth for communities.

Scotland's National Strategy for Economic Transition

4.64. In March 2022, the Scottish Government published the National Strategy for Economic Transformation[23] (NSET), which set out its ambition for Scotland's economy over the next decade. The Scottish Government's vision is to create a wellbeing economy where society thrives across economic, social and environment dimensions, and delivers prosperity for all of Scotland's people and places.

To deliver its vision, the strategy outlines six initiatives, including:

- establishing Scotland as a world-class entrepreneurial nation;
- strengthening Scotland's position in new markets and industries, generating new, well-paid jobs from a just transition to Net Zero;
- making Scotland's businesses, industries, regions, communities and public services more productive and innovative;
- ensuring that people have the skills they need to meet the demands of the economy, and that employers invest in their skilled employees;
- reorienting the economy towards wellbeing and fair work; and
- creating a culture of delivery.

4.65. The strategy highlights Scotland's significant energy potential and its expanding green industrial base. Whilst these characteristics provide a strong foundation for securing new market opportunities arising from the transition to Net Zero, the strategy recognises the need for continued investment and support to maximise the benefits associated with these opportunities.

[22] Scottish Government (2024), Programme for Government 2024-25: Serving Scotland (accessed on 18Sep25)
[23] Scottish Government (2022), Scotland's National Strategy for Economic Transformation (accessed on 18Sep25)

National Planning Framework (NPF) 4

4.66. The Fourth National Planning Framework (NPF4) [24] is Scotland's national spatial strategy, setting out the principles to be applied to planning decisions, regional priorities and national developments.

4.67. The first of six spatial principles to be applied is a just transition that ensures the transition to Net Zero is fair and inclusive, as is rural revitalisation, supporting sustainable development in rural areas. Applying these and other principles is intended to support the planning and delivery of sustainable places, where emissions reduce, and biodiversity is restored and better connected.

4.68. The preamble to Policy 11(a) of NPF4 confirms the policy objective is to provide support for development proposals for all forms of renewable, low carbon, and zero emissions sources. This includes enabling works such as grid transmission infrastructure. This is subject to the test outlined in Policy 11(c), which states that: "development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities".

4.69. Policy 11(e) also sets out a number of impacts that should be addressed during project design and mitigation. That list does not include tourism. Whilst not required by NPF4, Chapter 5 of this report considers whether there could be any implications for tourism since it is an important contributor to the local economy.

Green Industrial Strategy

4.70. Scotland's Green Industrial Strategy[25], published in September 2024, aims to help Scotland realise the economic benefits of the global transition to Net Zero. The strategy highlights Scotland's strengths and opportunities during the transition and outlines six key enabling factors that the Scottish Government and partners will do to foster a positive environment for investment and growth. These include:

- supporting investment, ensuring an investment-friendly ecosystem;
- investing in strong research and development foundations;
- supporting the development of a skilled workforce;
- helping supply chain businesses to seize opportunities;
- delivering an agile planning and consenting system; and
- delivering required housing and enabling infrastructure.

4.71. The strategy provides a clear direction and focus, highlighting the importance of prioritising resources and investment. The strategy also emphasises the need for coordinated policies to create the right environment and working collaboratively with partners to maximise economic benefit from the opportunities created by the transition to Net Zero.

[24] Scottish Government (2023), National Planning Framework 4 (accessed on 18Sep25)
[25] Scottish Government (2024), Green Industrial Strategy (accessed on 18Sep25)

Tourism Strategy: Scotland's Outlook 2030

4.72. A collaborative network of industry experts created Scotland's Outlook 2030[26], which is focused on creating a world-leading tourism sector in Scotland that is sustainable in the long-term.

4.73. The strategy is focused on four key priorities: people, places, businesses and experiences. The strategy recognises the effects on tourism of climate change, technological advancements, Brexit and changing consumer behaviour and highlights the need for collaboration between government, communities, and the public and private sectors.

4.74. There are six conditions that the strategy has highlighted as being crucial for success:

- using technological advancements and information to understand changes and trends in tourist behaviours;
- ensuring policies are in place that support the vision;
- enabling investment opportunities into Scotland's tourism market;
- improving transport and digital infrastructure;
- greater collaboration between businesses in the industry; and
- positioning Scotland as a great place to live and visit locally and globally.

4.75. A main commitment of the strategy is to address the effects of energy demand associated with tourism and make the sector commit fully to Scotland's ambition of becoming a net-zero society by 2045.

Regional Strategic Context

4.76. In addition to supporting the national objectives and economic strategies, the Proposed Development will also contribute to the economic aims of stakeholders across the Regional Area.

Regional Economic Strategy: A Sustainable Economic Future for the North East of Scotland

4.77. In 2024, Aberdeenshire Council, Aberdeen City Council, and Opportunity North East (ONE), published a strategy setting 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. The strategy highlights the challenges facing the region, and the implications for the region of the growth of the energy sector in areas such as offshore wind, carbon capture and green hydrogen production.

4.78. The strategy outlines the strategic context of the plan. Aberdeen is currently at the centre of the UK's largest source of fuel, oil and gas, but 90% of the UK's offshore oil and gas operators are cutting back investment. As the UK reduces the extraction of

[26] Scottish Tourism Alliance (2020), Scotland Outlook 2030. (accessed on 18Sep25)

oil and gas domestically, the need to invest in the infrastructure required to enable other sources of domestic energy production, in order to avoid reliance on high cost and higher carbon imports, increases significantly. The strategy recognises that this transition, if not handled correctly, could result in job losses in the region. It is therefore vital to enable and deliver a just transition which benefits communities and takes advantage of the North East's existing expertise and workforce in offshore activity.

4.79. The strategy sets out a vision for what the region will be like in 2035, focused on five key objectives:

- **Objective 1**: To establish the North East as a pioneer of the energy transition, by delivering an 80% reduction in carbon emissions per head;
- **Objective 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;
- **Objective 3**: Maintain a healthy, sustainable, working age population through increasing economic participation rates;
- **Objective 4**: Become a Real living Wage region with 95% of overall employment offering a real living wage or higher; and
- **Objective 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.

4.80. The Proposed Development would contribute to these objectives, by delivering infrastructure that will help enable the transition to net zero, generating GVA, and creating well-paid jobs which will help to attract people of working age and retain the population of the region.

Highlands and Islands Enterprise Strategy 2023-2028

4.81. The Highlands and Islands Enterprise Strategy,[27] published by Highlands and Islands Enterprise (HIE) for the period 2023 to 2028, focuses on achieving Net Zero, fair and inclusive growth, and regional transformational opportunities.

4.82. The strategy emphasises the declining working age population and tight labour market in the region and seeks to address these issues in part by investing in skills and utilising the opportunities created by the transition to net zero with the aim of improving population attraction and retention.

4.83. The renewable energy sector and low carbon economy have been identified as significant economic, social and industrial opportunities for the region, both now and in the future. HIE is committed to building on the region's international reputation for excellence in energy and low carbon by securing supply chain opportunities from energy developments. HIE's specific commitments include:

[27] Highlands and Islands Enterprise (2023), Highlands and Islands Enterprise Strategy 2023-2028. (accessed on 18Sep25)

- articulating regionally distinct opportunities and barriers to renewable deployment, with a particular focus on addressing grid constraints, technology adoption in rural areas, and investment in necessary infrastructure to support the transition to net zero;
- raising awareness and encouraging adoption of the just transition to net zero, including by delivering training programmes targeted at the young workforce; and
- supporting the deployment of renewables and the associated supply chain development.

4.84. The Proposed Development would contribute to these aims outlined in the strategy, directly creating employment opportunities as well as upgrading existing grid infrastructure, enabling the deployment of renewable energy in the region and the transition to net zero.

Moray Economic Strategy 2022

4.85. The Moray Economic Strategy[28] is a 10 year forward looking document which brings together a number of local partners across different sectors of the economy including government, education, tourism and business. The document sets out the long-term goals of making Moray a more prosperous and resilient economy as well as building communities that are strong, sustainable and equal.

4.86. The document identifies several key challenges facing Moray that may act as a hindrance towards achieving the long-term goals. It also includes different strategies the region will take to tackle these challenges, including:

- **labour market pressure:** alleviate the tight labour market by building houses, increasing childcare provision and better career opportunities for young people;
- **meet young people's aspirations:** provide opportunities in the fields of interest of young people in Moray such as healthcare, digital industries, life sciences and renewables;
- **skilled labour force:** improve the visibility of the skills required for emerging opportunities in the future; and
- **increase business productivity:** increase the number of large businesses, start-up rates and employment rates to drive up regional productivity.

4.87. The document also points to six key opportunities available to Moray that can play a significant role in transforming the regional economy. These include:

- **the Moray Growth deal:** £100 million invested across eight different projects, building on Moray's strengths in tourism, culture and manufacturing;
- **just transition to net zero:** capitalise on the opportunities that will arise in the construction, transport, manufacturing and land use sectors;
- **space, aerospace and other emerging engineering technology:** this is a recent development in Moray which has the potential for further significant growth;

[28] Moray Economic Partnership (2022), Moray Economic Strategy 2022: Towards Future Prosperity and Inclusive Growth. (accessed on 18Sep25)

- **community wealth building:** increase the amount of expenditure retained locally supporting local jobs; and
- **tourism:** build on the opportunities in the adventure tourism sector by utilising Moray's natural assets more effectively.

4.88. The strategy brings together a wide range of stakeholders to collectively achieve the goal of making Moray an attractive place to live, work, operate a business, study and visit. By effectively addressing the challenges facing the region and capitalising on the opportunities available, this strategy seeks to provide a 10-year forward looking blueprint on how to tackle these challenges, capitalise on the opportunities and ensure the region's future prosperity.

Regional Maximising Benefits Strategies

4.89. In addition to economic development strategies, Aberdeenshire, Highland, and Moray Councils have each published guidance on the expectations around maximising the net economic benefits of projects taking place within their associated regions. These are outlined below.

Aberdeenshire Council Community Wealth Building Strategy and Energy Charter

4.90. Aberdeenshire Council's Community Wealth Building Strategy [29] and its accompanying Energy Developments Charter set out the framework for how major energy projects should deliver lasting benefits to the region. This is a direct response to policies within NPF4, which require developments to maximise their net economic impact and contribute to local wealth building.

4.91. The Charter acknowledges the "once in a generation" scale of energy infrastructure investment expected in Aberdeenshire and aims to ensure that local communities benefit directly from the impacts of hosting these developments. It establishes a series of objectives and collaboration principles for developers, focusing on:

- **Fair Employment:** Creating local job opportunities and developing long-term skills pathways through apprenticeships and partnerships with local colleges and employability partnerships.
- **Proactive Procurement:** Providing opportunities for local businesses to participate in the supply chain through measures like "Meet the Buyer" events and providing long lead-in times for contracts to allow local firms to build capacity.
- **Socially Just Use of Land:** Supporting community capacity, addressing fuel poverty, and ensuring community benefit funds are tailored to the priorities identified in local Place Plans.

[29] Aberdeenshire Council (2025), Community Wealth Building Strategy and Energy Charter. (accessed on 18Sep25)

- **Equality:** Addressing rural inequalities and ensuring equality of opportunity for all, with specific outputs related to closing the gender pay gap and tackling barriers to employment.

4.92. These objectives ensure that all communities within Aberdeenshire can actively participate in and benefit from the economic activity supported through development.

Highland Council Social Value Charter for Renewables Investment

4.93. Given the scale of the pipeline of renewable energy projects in the region, in 2024 The Highland Council established a Social Value Charter [30] for Renewables Investment. The purpose of the Charter is to embed a community wealth building approach to projects within Highland and maximise the economic benefits from the region's natural resources for local communities.

4.94. In particular, the Charter sets out nine expectations for developers wishing to invest in renewables within Highland, and what the Highland partnership will do to support this contribution. These commitments fall under a 9-point plan to:

- retain community benefit within local communities;
- create a Strategic Fund and a Fund Partnership to support investment priorities within Highland;
- create legacy housing to support sustainable communities;
- support the development of the projects within the Highland Investment Plan;
- develop shared ownership models of investment in renewables;
- support skills and training initiatives;
- provide a Highland Project Bank, identifying community projects and initiatives to secure additional investment;
- fast-track for grid connections; and
- maximise socio-economic prosperity through the planning system.

Highland Council Community Wealth Building Strategy

4.95. The Highland Council's Community Wealth Building[31] (CWB) Strategy sets out a long-term plan to reorganise the regional economy, ensuring that wealth is generated and retained locally. The strategy directly supports the aims of National Planning Framework 4 (NPF4) by focusing on creating a fairer, greener, and more resilient wellbeing economy for all communities across the Highlands.

4.96. The strategy is built on five key pillars, with a series of commitments for each:

- **Progressive Procurement:** Prioritising spending with local businesses and small to medium-sized enterprises (SMEs) to keep wealth circulating within the Highland economy. This includes simplifying procurement processes to make them more accessible to local suppliers.

[30] Highland Council (2024), Social Value Charter for Renewables Investment. (accessed on 18Sep25)
[31] Highland Council (2024), Community Wealth Building Strategy. (accessed on 18Sep25)

- **Fair Employment:** Promoting fair work, secure employment, and real living wages. This involves creating local skills and training opportunities to help people access good quality jobs close to home.
- **Land and Assets:** Making more socially productive use of council-owned land and assets. This includes supporting community ownership and using council resources to address local needs such as affordable housing and climate action.
- **Plural Ownership of the Economy:** Fostering a diverse ecosystem of local and community-owned businesses, co-operatives, and social enterprises, ensuring that economic control is rooted in the community.
- **Making Financial Power Work for Local Places:** Influencing how and where capital is invested to ensure it meets the needs of local people, businesses, and communities, rather than being extracted from the region.

4.97. These pillars work together to create an economic model where local communities are the primary beneficiaries of the wealth they help to generate.

Moray Council Maximising Net Economic Impact

4.98. Whilst still in draft, the guidance published by Moray Council[32] draws upon the policies outlined within NPF4 and sets out the Council's approach to ensuring that energy development maximises economic benefits for local communities.

4.99. In particular, the Guidance outlines the need for consideration of NPF4 Policy 25 Community Wealth Building Strategy, including:

- improving community resilience, reducing inequalities and maximising local job creation;
- increasing spending within communities and ensuring the maximum use of local supply chains and services;
- creation of related new local firms; and
- enabling community ownership of buildings and infrastructure.

Moray Council Community Wealth Building Strategy

4.100. Moray Council's Community Wealth Building Strategy[33] provides a framework to create a fairer and more equal local economy where communities have a greater stake in the wealth that is generated. The strategy is a direct response to national policies like NPF4 and the National Strategy for Economic Transformation, aiming to retain and recirculate wealth within Moray to support a sustainable, inclusive, and fair economy.

4.101. The strategy is structured around five core pillars designed to empower local communities and businesses:

[32] Moray Council (2024), Development Plan Moray Guidance – Maximising Net Economic Impact NPF4 (Policy 11c) (accessed on 18Sep25)

[33] Moray Council (2024), Community Wealth Building Strategy. (accessed on 18Sep25)

- **Spending:** Adopting a "local first" approach to public procurement to build local supply chains, support fair work, and ensure more wealth is retained and circulated within Moray.
- **Workforce:** Investing in the local workforce by promoting fair wages, removing barriers to employment such as childcare, and providing skills and training opportunities to create clear career pathways.
- **Inclusive Ownership:** Supporting the growth of locally owned enterprises, including small businesses, social enterprises, and co-operatives, to ensure they have a greater stake in and control over the local economy.
- **Land and Property:** Ensuring that public land and assets are used for the maximum benefit of local communities, supporting initiatives like community asset transfers and addressing key local challenges such as fuel poverty and the shortage of affordable housing.
- **Finance:** Influencing local investment to ensure it supports community-led projects and local development, leveraging major funding streams like the Moray Growth Deal and Just Transition Fund to benefit the regional economy.

4.102. Together, these pillars aim to address regional challenges such as low wages, skills shortages, and the gender pay gap, fostering an economy that prioritizes the wellbeing of people, place, and the planet.

Corporate Strategic Context

4.103. Advanced under Ofgem's Accelerated Strategic Transmission Investment (ASTI) framework, SSEN Transmission's 'Pathway to 2030' programme will enhance electricity transmission infrastructure across northern Scotland by 2030, contributing to Scotland and the UK's net zero ambitions.

Accelerated Strategic Transmission Investment (ASTI) Framework

4.104. In 2022, Ofgem introduced a new regulatory framework, Accelerated Strategic Transmission Investment (ASTI), to streamline the regulatory process for Transmission Owners, such as SSEN Transmission, to support the accelerated delivery of transmission projects.

4.105. The ASTI framework provides a new process with a reduced number of regulatory assessment stages for Transmission Owners and earlier access to funding to support the delivery of necessary onshore transmission projects required to meet the UK Government's 2030 renewable electricity generation ambitions.

4.106. Ofgem has identified an initial list of projects to be progressed under the ASTI framework, including SSEN Transmission's Pathway to 2030 Programme.

Pathway to 2030 Programme

4.107. SSEN Transmission is investing over £20 billion, under their Pathway to 2030 programme, to contribute to the delivery of several projects designed to develop and upgrade overhead lines, substations, and subsea links, to meet the 2030 offshore wind connection dates.

4.108. The East Coast Projects, of which the Proposed Development is a part of, is among the projects under the Pathway to 2030 programme and will contribute to the delivery of Scotland and the UK's Net Zero targets for 2030.

SSEN Transmission: Supporting Community Wealth and Local Prosperity

4.109. SSEN Transmission plays a key role in enabling Scotland's transition to a low-carbon future by delivering major electricity transmission infrastructure. While these developments are vital for achieving national climate goals, they can have significant impacts on the communities where they take place. SSEN Transmission is committed to managing those impacts responsibly and ensuring that local people benefit from the investment taking place in their areas. This includes steps to avoid sensitive receptors such as population centres, historic sites, and valued landscapes.

4.110. Just as the rollout of hydroelectric power in the 1950s helped transform rural Scotland, SSEN Transmission is committed to creating a positive legacy from today's renewable energy revolution – by supporting jobs, adding value, and maximising net economic benefits for the regions in which it operates.

4.111. To ensure that the benefits of its projects are retained and reinvested locally, SSEN Transmission has adopted a Community Wealth Building (CWB) approach. It underpins SSEN Transmission's commitment to resilient, inclusive, and sustainable economic development.

4.112. SSEN Transmission's CWB approach is closely aligned with its support for a Just Transition, as articulated in the SSE Group's 2024 strategy[34]. The company is developing a Just Transition Workforce Plan and has adopted a place-based approach to ensure that decision-making and interventions reflect the needs and priorities of local people. This strategy includes a framework of 20 guiding principles and ten Key Performance Indicators (KPIs) to monitor progress, ensuring that the shift to net zero is fair, inclusive, and locally grounded.

4.113. In September 2024, SSEN Transmission launched a £10 million Community Benefit Fund to support community projects that align with the principles of CWB. The fund is expected to grow and play a central role in delivering long-term local benefits from SSEN Transmission's infrastructure investments.

4.114. The first round of funding supported projects that reflect a broad range of community priorities, including skills development and training, the preservation of

[34] SSE (2024) Embedding a Just Transition - https://www.sse.com/media/4qfjjgvu/just-transition-strategy-update.pdf (accessed on 18Sep25)

valued community spaces, cultural heritage initiatives, and efforts to alleviate fuel poverty. Funding is available to communities across the north of Scotland.

4.115. SSEN Transmission believes that responsible development means working in close partnership with communities. SSEN Transmission engages proactively with local stakeholders to understand their needs and incorporate local priorities into project planning and delivery. This includes efforts to minimise the cumulative visual and environmental impacts of its developments and seek innovative solutions where challenges arise.

4.116. Through initiatives like the Community Benefit Fund, Housing Strategy, and strategic supplier partnerships, SSEN Transmission aims to ensure that the benefits of the energy transition are shared with those most directly affected – contributing to stronger, more resilient communities throughout the north of Scotland.

SSEN Transmission Housing Strategy 2024

4.117. SSEN Transmission's Housing Strategy 2024[35] outlines a proactive approach to housing the substantial workforce required for major electricity transmission projects in the North of Scotland. These projects are essential to supporting the UK's transition to net zero but present unique challenges due to their rural and remote locations. With a peak workforce of around 5,000 expected in 2027, the strategy aims to avoid exacerbating the region's existing housing crisis while ensuring smooth project delivery.

4.118. The strategy builds on SSE's legacy of housing provision and is designed to support all "Pathway to 2030" projects. It was developed by a steering committee to ensure consistency across projects, with the dual aims of facilitating delivery and leaving a positive, long-term legacy for communities. The strategy sets out to:

- support project delivery by ensuring adequate accommodation for workers;
- strengthen stakeholder and community support through collaborative housing plans;
- address rural housing pressures by creating legacy benefits and avoiding negative market impacts; and
- contribute to a just transition aligned with SSEN's broader sustainability commitments.

4.119. These objectives are further articulated through four strategic goals focused on avoiding negative impacts, fostering institutional support, benefiting local communities, and contributing to long-term sustainability. SSEN Transmission acknowledges the public benefit imperative of its work and is committed to creating lasting value through housing. Notable initiatives include:

[35] SSEN Transmission (2024) Housing Strategy 2024 - https://www.ssen-transmission.co.uk/globalassets/documents/housing-strategy/ssent-housing-strategy-2024- (accessed on 18Sep25)

- supporting the development of at least 200 homes, with the expectation of exceeding this through partnerships;
- unlocking up to 1,000 new build homes by 2030 via long-term leases;
- refurbishing disused buildings such as care homes or hotels for temporary use, potentially transitioning to community assets; and
- backing empty homes initiatives to bring vacant properties back into use.

4.120. Multiple accommodation models are explored, including:

- purpose-built villages, designed to be modular and potentially repurposed post-project;
- new build homes, which can later be integrated into local housing stock;
- use of hotels and rental properties, with care taken to minimise impact on tourism; and
- caravan accommodation, held to high standards based the Principal Contractor's best practices.

4.121. Guidance is provided to ensure high-quality housing, integration with local services, and careful planning for location, infrastructure, and amenities. A coordinated planning approach links transmission infrastructure development with accommodation needs. A Development Brief provides the structure for high-quality, community-compatible worker housing. The strategy also includes a clear RACI[36] chart – which sets out who is Responsible, Accountable, Consulted, and Informed – to clarify roles during the planning and consenting process.to clarify roles during the planning and consenting process.

4.122. SSEN Transmission adopts a strategic, contractor-led procurement approach that balances cost efficiency, quality, innovation, and risk management. Collaboration between contractors and suppliers is central to the delivery of the Housing Strategy.

4.123. This collaboration is facilitated through two key mechanisms. Firstly, initial engagement events, known as Supplier Days, are held to bring principal contractors together. At a Supplier Day on 6th June 2024, for example, contractors formally agreed to a collaborative approach. Secondly, this is followed by the establishment of an ongoing Housing Strategy Supplier Forum, a working group with fortnightly meetings designed to enhance collaboration, standardise processes, and identify opportunities for shared accommodation infrastructure.

4.124. Through this structured engagement, contractors are expected to align with the Housing Strategy's objectives when selecting the most appropriate accommodation models for their workforce.

4.125. Delivery is managed by a cross-functional steering committee, with local Area Working Groups ensuring effective collaboration across stakeholders, including

[36] RACI Chart (also known as a responsibility assignment matrix) is a project management tool used to clarify roles and responsibilities within a team.

local authorities and community representatives. A newly created Housing Strategy Manager role oversees implementation, supported by project managers across the region.

Conclusions on Impact in Context

4.126. The Proposed Development represents critical investment in Scotland's grid infrastructure, facilitating the transmission of clean energy and contributing to delivering SSEN Transmission's corporate strategy, Pathway to 2030. In this way, the Proposed Development aligns with Scotland's national energy strategy and the UK's Net Zero agenda.

4.127. At a regional level, the Proposed Development could help to address key strategic priorities for the Regional Area by creating high-quality employment opportunities which will help to attract people of working age and retain the population of the region. The Proposed Development will also deliver infrastructure that will help enable the transition to net zero, which both regional strategies identify as an important area of opportunity for the region.

4.128. SSEN Transmission has adopted a CWB approach to ensure that the economic benefits of its infrastructure investments are retained and reinvested locally. The CWB framework focuses on five key pillars: inclusive ownership, spending, workforce, land and property, and finance. This approach aligns with the Scottish Government's vision for a fairer, more equitable society and is closely linked to SSEN Transmission's role in delivering a Just Transition. The company's £10 million Community Benefit Fund supports a wide range of local initiatives, including skills development, cultural heritage, and fuel poverty alleviation. In addition, SSEN Transmission's Housing Strategy aims to tackle accommodation shortages linked to project development, while contributing to long-term housing and depopulation challenges in the north of Scotland, with a target of delivering at least 200 new homes by 2030.

5. Tourism Assessment

5.1. This section considers the potential impact of the Proposed Development on tourism and recreation.

5.2. It first establishes the local tourism context before reviewing the findings of the formal assessment in Chapter 14: Recreation and Tourism of the EIAR. To contextualise these findings, evidence from studies on similar infrastructure projects is presented. The section concludes that while two localised, temporary effects were identified, there is not expected to be a measurable impact on the wider regional tourism economy.

Local Tourism Context

Sustainable Tourism GVA and Employment

5.3. In its 2015 economic strategy[37], the Scottish Government identified sustainable tourism as one of six key growth sectors where Scotland has a comparative advantage. In 2022, the sustainable tourism sector in the Highland, Aberdeenshire, and Moray was estimated to generate £566.5 million GVA, accounting for 11.8% of Scotland's total tourism sector value (£4.8 billion GVA) (Table 5-1).

Table 5-1: Sustainable Tourism: Employment and GVA, 2022

	Aberdeenshire, Highland, and Moray	Scotland
GVA (£m)	566.5	4,803.3
Employment	29,500	229,000

Source: Scottish Government (2025), Growth Sector Database.

Visitors

5.4. Specific data on visitor numbers and spending in the individual local authority areas of Aberdeenshire, Highland and Moray is unavailable. This is because the information is published at the broader regional tourism partnership level. Therefore, to provide context for the tourism economy surrounding the Proposed Development., data has been used from the relevant regional tourism areas: Aberdeen, Aberdeenshire and Moray Speyside, and Highland.

5.5. In 2023, the Highlands, Aberdeen City, Aberdeenshire and Moray attracted 2.8 million domestic overnight visitors, who spent an average of £244 per visit, amounting to a total of £689 million. This accounted for 21.6% of the total spend in Scotland from domestic overnight visits in 2023. As illustrated in Table 5-2, the Highlands, Aberdeen City, Aberdeenshire and Moray also drew approximately

[37] Scottish Government (2015), Scotland's Economic Strategy. (accessed on 18Sep25)

805,000 international overnight visitors, contributing £483 million in spending, accounting for 13.4% of all international overnight visits to Scotland.

Table 5-2: Visits and Visitor Spending, 2023

	Highland, Aberdeen City, Aberdeenshire and Moray	Scotland
		Visitor Numbers (million)
Domestic Overnight Visitors	2.8	12.4
International Overnight Visitors	0.8	4.0
		Spend (£ million)
Domestic Overnight Visitors	689	3,189
International Overnight Visitors	483	3,593

Source: Kantar (2024), Great Britain Survey 2022/2023. Kantar (2023), Great Britain Day Visitor Survey. International Passenger Survey (2023), Great Britain Tourism Survey, 2023.

Impact on Tourism and Recreation

5.6. The assessment for Recreation and Tourism (Chapter 14 of the EIAR) identified two significant residual effects, both of which are associated with the construction phase of the Proposed Development. Chapter 14 was also informed by the assessments presented in Chapter 7: Landscape and Visual, Chapter 15: Noise and Vibration, and Chapter 13: Transport of the EIAR. The significant residual effects are outlined in Table 5-3.

Table 5-3: Summary of Effects Identified in Chapter 14: Recreation and Tourism

Receptor	Likely Significant Effects	Residual Effects
Highland Council		
Construction Phase		
Recreational users and tourists – Woodlands including: Daviot Wood, The Aird and Clunas Wood	Moderate Adverse (Significant)	Moderate Adverse (Significant)
Moray Council		
Construction Phase		
Recreational users and tourists – Woodlands including: Speymouth Forest, Moss of Bednawinny and Badentinan Wood	Moderate Adverse (Significant)	Moderate Adverse (Significant)

Source: Chapter 14: Recreation and Tourism, Section 14.8 (Summary and Conclusions), Table 14.12

Evidence from Other Projects

5.7. Whilst two significant residual effects were identified in Chapter 14: Recreation and Tourism of the EIAR, there have been several studies[38] published evaluating the impact of large energy infrastructure projects on tourism businesses as well as visitor perceptions and behaviours across the pre-construction, construction and post-construction stages. These studies have employed different methods including correlation analysis, case studies and surveys and interviews to study the relationship between energy infrastructure and tourism.

5.8. Across the studies, the majority of businesses and visitors reported no noticeable impact from the energy projects with only a small proportion, one to three percent, of businesses citing any form of negative impact. The most frequently cited negative impacts were traffic disruption and landscape effects.

5.9. Businesses also reported a number of positive impacts from the presence of energy infrastructure which included increased customers numbers and spending, workers staying in accommodation during the construction period and overall job creation during the construction period.

5.10. The studies found that businesses, on the whole, stated no noticeable disruption to their business performance during the proposal, construction and operational phase of the energy infrastructure projects. These findings were identified across different regions, methodologies and types of energy projects. When businesses were asked about the largest source of impact, the most often cited cause was macroeconomic issues such as the state of the economy, weather conditions and costs. Only one study reported a negative sector specific impact where hotels and B&Bs experienced reduced demand from deer stalking tourists.

5.11. Visitor specific studies found that most recreational users did not alter their behaviour or spending due to the presence of infrastructure projects. This finding was consistent before and after construction, across both local residents and tourists. The studies also mention that even when visitors perceived negative impacts on the landscape, it was unusual for this to translate into change in behaviour.

5.12. The evidence from these studies is clear and consistent: the overwhelming majority of tourism businesses and recreational users report no change to their performance or behaviour resulting from the presence of energy infrastructure. While visual impacts on the landscape are the most commonly perceived effect, the evidence

[38] Roger Tym & Partners (2011) Second Yorkshire Line Ex Post Tourism Assessment; Roger Tym & Partners (2006) Scotland Northern Ireland Interconnector Ex Post Tourism Impact Assessment; Royal HaskoningDHV (2020) East Anglia ONE North and East Anglia TWO Offshore Windfarms; Orsted (2019) Hornsea Project Three Offshore Windfarm Appendix 39 to Deadline 4 Submission.

shows this rarely translates into a tangible impact on visitor activity or business revenue.

Summary of Tourism and Recreation Impact

5.13. Chapter 14: Recreation and Tourism of the EIA Report identified two significant residual effects on recreational receptors during the construction phase, with no significant operational effects. While these effects are important at a local level, they represent a very small proportion of the hundreds of tourism and recreation assets in the wider region. Furthermore, evidence from numerous studies on similar energy infrastructure projects consistently shows that the overwhelming majority of tourism businesses and visitors report no noticeable negative impact on their revenue or behaviour. On this basis, the effects of the Proposed Development are not expected to have a measurable impact on the overall regional tourism economy or visitor spending patterns.

6. Conclusions

6.1. The Proposed Development is a critical infrastructure project that will support Scotland and the UK's transition to Net Zero while generating significant economic benefits.

6.2. Achieving national decarbonisation goals is dependent on expanding and reinforcing the electricity grid to accommodate the growth in renewable energy generation in the north of Scotland. As outlined by the National Energy System Operator (NESO), this is an urgent requirement. The Proposed Development directly addresses this strategic need by creating the capacity to transmit clean energy from the north of Scotland to the rest of the country, thereby advancing the national energy agenda.

6.3. In addition to advancing Scotland's and the UK's energy agenda, the Proposed Development is expected to generate positive economic effects. Under the core scenario (as defined in Section 3.1), the Proposed Development is expected to generate economic benefits during the development and construction phase, the scale of the total economic impact is expected to be:

- £41.8 million GVA and 385 years of employment across the Regional Area[39];
- £413.2 million GVA and 4,010 years of employment across Scotland; and
- £1,068.1 million GVA and 10,334 years of employment across the UK.

6.4. There is also potential for these positive economic effects to be further enhanced. Under an "ambition scenario," which assumes a higher level of local supply chain involvement, the economic impact could increase to:

- £91.2 million GVA and 846 years of employment across the Regional Area;
- £495.5 million GVA and 4,931 years of employment across Scotland; and
- £1,392.1 million GVA and 13,563 years of employment across the UK.

6.5. To maximise local benefits, SSEN Transmission has adopted a Community Wealth Building (CWB) approach and a Housing Strategy that aims to deliver at least 200 new homes in the north of Scotland by 2030, helping to tackle rural depopulation.

6.6. Whilst two significant effects were identified in Chapter 14: Recreation and Tourism of the EIAR during the construction phase, the Proposed Development is not expected to have an adverse effect on the wider regional tourism sector or visitor spending patterns.

[39] The 'Regional Area' is defined as the combined local authorities of Aberdeenshire, Highland, and Moray.

7. Appendix A: Methodology

7.1. An Input-Output economic model was developed to estimate the economic impact of the Proposed Development.

Metrics of Assessment

7.2. The following types of economic impact have been considered:

- **Gross Value Added (GVA)**: a measure of economic activity expressed as the difference between an organisation's turnover and its non-staff operational expenditure; and
- **Years of Employment**: a measure of employment used in the context of jobs associated with construction activity and lasting over a short period of time, or to express cumulative employment impacts over a project's lifespan.

Types of Impact

7.3. There are three types of economic impact associated with development and construction of the Proposed Development:

- **Direct Impacts**: These are the effects that arise from the economic activity of organisations directly involved in the delivery of the Proposed Development, such as Tier 1 contractors. The direct impact is calculated by taking the project's direct expenditure and applying official economic ratios for the relevant sectors to estimate the GVA and employment supported;
- **Indirect Impacts:** this is the impact associated with spending in the supply chain of Tier 1 suppliers. This is captured by applying Type 1 economic multipliers to the direct economic impacts; and
- **Induced Impacts:** this is the impact associated with staff spending their wages in the wider economy and is captured by subtracting Type 1 multipliers from Type 2 multipliers and applying this to the direct impact.

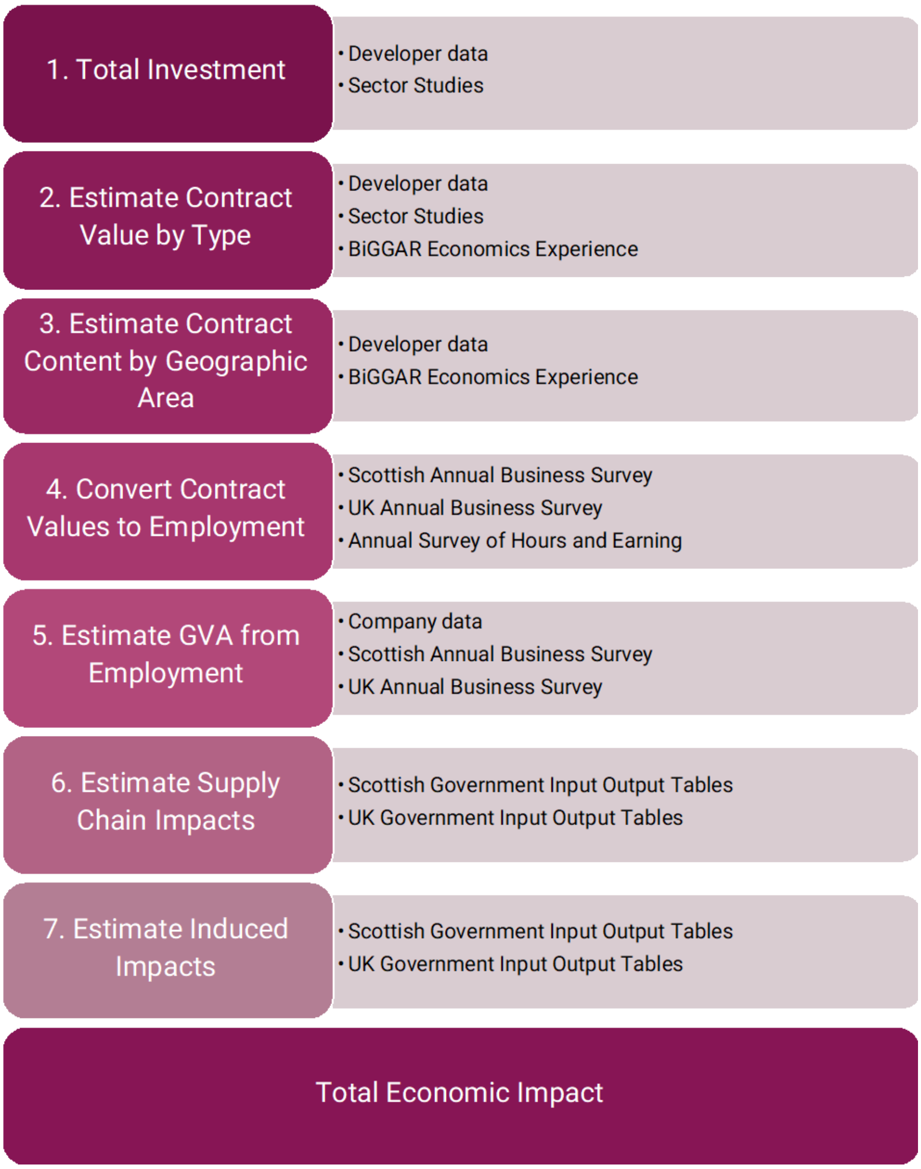
Methodology

Approach to Modelling Economic Impacts

7.4. The approach followed throughout the economic impact assessment is shown in the figure below. The analysis involved estimating levels of expenditure by contract and study area and then considering GVA and employment impacts (including indirect and induced effects).

7.5. The economic analysis is based on high-level cost estimates provided by SSEN Transmission, and where necessary, detailed assumptions were made regarding how this expenditure might be distributed across different categories. For each category, assumptions were made about the proportion of contracts that could be secured in each area, along with the relevant sectors for each contract. These estimates were informed by SSEN Transmission's experience with similar projects and BiGGAR Economics' understanding of UK supply chains and expertise in the sector.

Figure 7-1: Economic Impact Methodology



Economic Impact Modelling

7.6. The first step in conducting the economic analysis was to make assumptions regarding the capacity of businesses to secure contracts and to assign each contract to the appropriate Standard Industrial Classification (SIC) sector. This allowed for the calculation of the direct GVA, and years of direct employment supported by the Proposed Development. These estimates were derived by applying sector specific turnover per job and turnover per GVA ratios from the UK Annual Business Survey[40], as illustrated in the figure below.

Figure 7-2: Direct GVA Calculation

Expenditure £1m × GVA-Turnover Ratio 38% = Direct GVA £0.38m

7.7. The economic activity generated by the Proposed Development extends beyond the direct contributions of awarded contracts to the turnover of recipient businesses. Contract-related spending also stimulates activity within the supply chain of businesses involved in the development and construction phases (indirect impacts). Furthermore, employees working on the Proposed Development contribute to the economy through their personal spending (induced impacts).

7.8. Indirect impacts were estimated by applying Type 1 GVA and employment multipliers, as sourced from UK Input Output Tables[41] to the direct GVA and employment supported by development and construction contracts. Similarly, induced impacts were estimated by applying Type 1 and Type 2 GVA and employment multipliers to the direct GVA and employment supported. This is demonstrated in the figures below.

Figure 7-3: Indirect GVA Calculation

Direct GVA £0.38m × Type I Multiplier – 1 (2.2-1) = 1.2 = Indirect GVA £0.46m

Figure 7-4: Induced GVA Calculation

Direct GVA £0.46m × Type II Multiplier – Type I Multiplier (2.89-2.2) = 0.69 = Induced GVA £0.31m

7.9. The total economic impact associated with the Proposed Development is calculated by the sum of direct, indirect and induced impact, as demonstrated in the figure below.

Figure 7-5: Total GVA

Direct GVA £0.38m + Indirect GVA £0.46m + Induced GVA £0.31m = Total GVA £1.15m

[40] UK Government (2024), UK Annual Business Survey 2022.
[41] ONS (2024), UK Input-Output Supply and Use Tables 2022.

8. Appendix B: Socio-Economic Assessment Addendum

Scottish & Southern Electricity Networks

Socio-Economic Assessment Addendum

September 2025

Energy Consents Unit Reference Number: ECU00005165

Section 37 consent application (Electricity Act 1989) along with a request for a direction that planning permission be deemed to be granted under section 57(2) of the Town and Country Planning (Scotland) Act 1997 for:

SSEN Transmission is proposing to submit an application for permission under Section 37 of the Electricity Act 1989 to install, operate and keep installed approximately 186 km of new 400 kilovolt (kV) double circuit steel structure overhead transmission line (OHL), including downleads, to connect into new substation sites at Fanellan in the area of Beauly, Greens in the area of New Deer, and Netherton in the area of Peterhead. The Proposed Development also includes crossing works, temporary diversions and permanent realignment works to existing 132 kV and 275 kV OHLs, of approximately 14.7 km in total, and ancillary development and associated works.

Introduction

This Statement sets out Scottish Hydro Electric Transmission plc's (operating and known as SSEN Transmission) further information in relation to socio-economic matters.

This is in relation to a Section 37 Consent application for:

Beauly to Blackhillock to New Deer to Peterhead 400kV Overhead Line (OHL) Project

A socio-economic assessment has been prepared by Biggar Economics to accompany this application. This Addendum Statement is intended to amplify SSEN Transmission's adopted position in relation to socio-economic and related matters taking into account recently published documents by The Highland Council (THC), Moray Council and Aberdeenshire Council.

These documents are:

- THC Social Value Charter for Renewables Investment (June 2024);
- THC Community Wealth Building Strategy (September 2024);
- Aberdeenshire Council's Community Wealth Building Strategy (March 2025);
- Aberdeenshire Council's Charter for Energy Development in Aberdeenshire (March 2025);
- Moray Council's Community Benefit Guidance (2014); and
- Moray Council Community Wealth Building Strategy (2024).

This document will address SSEN Transmission's approach to these matters generally, before addressing the specifics of the aforementioned documents.

Community Wealth Building

SSEN Transmission takes the role of Community Wealth Building (CWB) in society seriously, although it should be acknowledged that many of the elements of Community Wealth Building fall outwith the remit of the planning system.

CWB seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, enabling equitable economic opportunities and long-term business resilience.

Our approach to CWB is based on the Scottish Government's approach to CWB as a method chosen by the Scottish Government to deliver a fairer, more equal society as part of a National Strategy for Economic Transformation.

SSEN Transmission has adopted the following Five Pillars of CWB:

1. Inclusive Ownership - developing more local and social enterprises that generate community wealth.

2. Spending - maximising community benefits through procurement and commissioning, developing good enterprises, fair work and shorter supply chains.
3. Workforce - increasing fair work and developing local labour markets.
4. Land and property - growing the social, ecological, financial and economic value that local communities gain from land/property assets.
5. Finance - ensuring that flows of investment and financial institutions work for local people, communities and businesses.

For more information on the commitments made by SSEN Transmission, please see below a link to our corporate web page on Community Wealth Building.

Communities - SSEN Transmission

Community Benefit Fund

In September 2024, SSEN Transmission launched a Community Benefit Fund with an initial value of £10 million. This fund is designed to support projects that create a positive impact in communities, and over the coming years it is anticipated that significant funding will be available through the fund to support local economic development, community, and wellbeing economy projects. The fund can be used by communities and the third sector to support CWB projects across the north of Scotland.

A Regional Fund has been created to support strategic projects in the region focusing on the following themes:

- People: Focusing on skills, training and employability;
- Place: Emphasising the community and culture of the north of Scotland; and
- Alleviating fuel poverty: looking at strategic ways to help people across the region.

The first funds have been allocated, and the fund will reopen this summer for applications. Details of funded projects are available on the website. More information on the Community Benefit Fund is available on the link below, including the purpose of the fund, fund structure, how it is financed, governance, and more.

Community Benefit Fund

SSEN Transmission Housing Strategy

In November 2024, SSEN Transmission published its housing strategy in relation to the delivery of the Pathway to 2030 projects. As the strategy notes, it is crucial to capture opportunities to create public benefit from this investment efficiently and with a strong balance between cost and benefit.

With this in mind, we are committed to creating housing legacies from our worker accommodation investments. The goals of leaving a community legacy from worker housing solutions are:

- Preventing Exacerbation of Rual Housing Challenges;
- Building Institutional support;
- Contributing to Local Communities; and
- Supporting a just transition.

The delivery of the housing strategy will itself bring socio economic benefits to local communities. There are ongoing discussions between SSEN Transmission, local authorities and other key stakeholders in relation to the identification and delivery of housing sites.

ssent-housing-strategy-2024-

Socio Economic Assessments and NPF 4 Policy 11

This document seeks to provide a summary of the potential economic impacts generated by the Proposed Development and construction of the project. We would suggest that more detailed employment related matters are a post-consent issue for the principal contractor and could be considered further through a pre-commencement condition, worded along the following lines:

Prior to the Commencement of Development, a Local Employment Scheme for the construction of the development shall be submitted to and agreed in writing by the Planning Authority. The Scheme shall include the following:

a) details of how the initial staff/employment opportunities during construction of the development will be advertised and how liaison with the Council and other local bodies will take place in relation to maximising the access of the local workforce to information about employment opportunities;
b) details of how training opportunities will be provided for those recruited to fulfil staff/employment requirements including the provision of apprenticeships or an agreed alternative;
c) a procedure setting out criteria for employment, and for matching of candidates to the vacancies;
d) measures to be taken to offer and provide college and/or work placement opportunities at the development to students within the locality;
e) details of the promotion of the Local Employment Scheme and liaison with contractors engaged in the construction of the development to ensure that they also apply the Local Employment Scheme so far as practicable having due regard to the need and availability for specialist skills and trades and the programme for constructing the development;

f) *a procedure for monitoring the Local Employment Scheme and reporting the results of such monitoring to the Council; and*
g) *a timetable for the implementation of the Local Employment Scheme. Thereafter, the development shall be implemented in accordance with the approved scheme.*

Reason: In order to ensure compliance with NPF4 Policy 11c) and to maximise the local socio-economic benefits of the development to the wider community. To make provision for publicity and details relating to any local employment opportunities.

THC Social Value Charter for Renewables Investment (June 2024)

This document was published by THC in June 2024 and sets out the community benefit expectations from developers wishing to invest in renewable developments in the area.

It is important to note that the Proposed Development is not a renewables development, but indeed an 'electricity transmission' development.

However, the Charter has been reviewed, and the table below provides a summary of the commitments and measures which are considered to meet the Charter.

Theme	SSEN Response
Community Fund	Our Community Benefit Fund is designed to bring substantial benefits and a positive, lasting legacy through local and regional initiatives across the north of Scotland. This Fund is designed to support projects that create a positive impact in communities, and over the coming years, it is anticipated that significant funding will become available to support local economic development, community, and wellbeing economy projects. It is considered that the desired commitment to £5000 per MW is not applicable to Transmission development.
Strategic Fund	Our Community Benefit Fund is designed to bring substantial benefits and a positive, lasting legacy through local and regional initiatives across the north of Scotland. This Fund is designed to support projects that create a positive impact in communities, and over the coming years it is anticipated that significant funding will be available through the

	fund to support local economic development, community, and wellbeing economy projects. It is considered that the desired commitment to £7500 per MW is not applicable to Transmission development.
Housing	Our Housing Strategy aims to optimise long-term value for communities, and a commitment to leave a positive community legacy by delivering hundreds of homes by 2030.
Supporting Development of Highland Investment Plan	Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience. This is reflected in our Five Pillars of CWB: 1. Inclusive Ownership; 2. Spending; 3. Workforce; 4. Land & Property; and 5. Finance More specifically, SSEN Transmission Principal Contractors are obliged to target and consider local supply chain opportunities (wherever possible) Our adopted Supplier Diversity Scheme sets out how SSE aims to support local economies and use suppliers with diverse ownership models. The Strategy summarises our definition of supplier diversity, the value of supplier inclusion, our efforts to create an inclusive and varied supply chain, as well as our future plans to achieve these objectives.
Shared Investment into Renewables	It is considered that this theme is not applicable or relevant to transmission development.
Skills & Training – Workforce for the Future	Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience. This is reflected in our Five Pillars of CWB: 1. Inclusive Ownership; 2. Spending;

	3. Workforce; 4. Land & Property; and 5. Finance More specifically, SSEN Transmission Principal Contractors are obliged to target and consider opportunities for the local supply chain (wherever possible). Our adopted Supplier Diversity Scheme sets out how SSE aims to support local economies and use suppliers with diverse ownership models. The Strategy summarises our definition of supplier diversity, the value of supplier inclusion, our efforts to create an inclusive and varied supply chain, as well as our future plans to achieve these objectives. Since 2015, SSEN Transmission has been a Living Wage Friendly Funder to support the roll-out of fair pay to organisations it supports. SSEN Transmission's Sustainable Workforce Strategy embeds inclusion and diversity into the business. SSEN Transmission run an independent annual survey to capture and respond to employee feedback.
Match Funding for Local Projects	Our Community Benefit Fund is designed to bring substantial benefits and a positive, lasting legacy through local and regional initiatives across the north of Scotland. This Fund is designed to support projects that create a positive impact in communities, and over the coming years it is anticipated that significant funding will be available through the fund to support local economic development, community, and wellbeing economy projects
Fast-Track for Grid Connections	SSSEN Transmission are committed to working with renewable developers for connection applications and fulfilling our licence obligations in terms of connections.
Maximising socio-economic prosperity through the planning system	It is considered that the response to the other themes in this addresses this theme in tandem at the same time.

THC Community Wealth Building Strategy (September 2024)

This document was approved in September 2024 and sets out THC's approach to CWB in the area.

To summarise, this strategy looks to deliver a vision through 5 objectives that align with the pillars of CWB. These are:

- Objective 1) Spending;
- Objective 2) Fair Employment;
- Objective 3) Land and Property;
- Objective 4) Financial Power; and
- Objective 5) Inclusive Ownership.

It is important to note that this statement has already provided an extensive overview of the community benefit and CWB initiatives of SSEN Transmission.

As such, it is considered that the information from earlier in this statement can be applied to this CWB strategy.

However, for clarity the relevant points are again set out below.

Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience.

This is reflected in our Five Pillars of CWB:

1. Inclusive Ownership;
2. Spending;
3. Workforce;
4. Land & Property; and
5. Finance.

SSEN Transmission is committed to CWB and sharing benefits with communities; and to working with partners to support local projects, supply chains and housing solutions (where applicable).

Aberdeenshire Council's Community Wealth Building Strategy (March 2025) and Charter for Energy Development in Aberdeenshire (March 2025)

These documents were published by Aberdeenshire in March 2025 and set out the expectations from energy development including renewables and infrastructure.

The table below, takes into account, specifically, the objectives and outcomes of the Charter for Energy Development, and how SSEN Transmission responds to these.

Objectives	**SSEN Response**
Fair Employment: Promote jobs locally and develop long term and collaborative skills pathways	Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience. This is reflected in our Five Pillars of CWB: 1. Inclusive Ownership; 2. Spending; 3. Workforce; 4. Land & Property; and 5. Finance More specifically SSEN Transmission Principal Contractors to create social value plans and have targets for using the local supply chain. Furthermore, the condition proposed above requires the preparation, submission and implementation of a Local Employment Scheme. This will give the Council a mechanism by which to secure and influence local employment opportunities. It is considered that the commitments referred to above will contribute towards meeting all of the Council's identified outcomes for this objective.
Proactive Procurement: Providing support and opportunity for local business to participate in the supply chain to increase local and regional spend.	As above, our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience. This is reflected in our Five Pillars of CWB: 1. Inclusive Ownership; 2. Spending; 3. Workforce; 4. Land & Property; and 5. Finance More specifically our adopted Supplier Diversity Scheme sets out how SSE aims to support local economies and use suppliers with diverse ownership models. The Strategy summarises our definition of supplier diversity, the value of supplier inclusion, our efforts to create an inclusive and varied supply chain, as well as our future plans to achieve these objectives.

	It is considered that the commitments referred to above will contribute towards meeting all of the Council's identified outcomes for this objective.
Socially Just use of land and property: more vibrant, safe and resilient communities.	Our Community Benefit Fund is designed to bring substantial benefits and a positive, lasting legacy through local and regional initiatives across the north of Scotland. This Fund is designed to support projects that create a positive impact in communities, and over the coming years it is anticipated that significant funding will be available through the fund to support local economic development, community, and wellbeing economy projects Our Housing Strategy aims to optimise long-term value for communities, and a commitment to leave a positive community legacy by delivering hundreds of homes by 2030. It is considered that the commitments referred to above will contribute towards meeting those outcomes associated with improving the vitality of local places and developing social capital and improving local housing stock, as identified by the Council for this objective.
Equality: Addressing rural inequalities and ensuring equality of opportunity for all	As above, our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience. This is reflected in our Five Pillars of CWB: 1. Inclusive Ownership; 2. Spending; 3. Workforce; 4. Land & Property; and 5. Finance Specifically, SSEN Transmission is an accredited Real Living Wage, Living Hours and Living Pensions employer. SSE has rolled-out Living Wage to non-direct employees and services and works contracts across the UK Since 2015, SSEN Transmission has been a Living Wage Friendly Funder to support the roll-out of fair pay to organisations it supports.

	SSEN Transmission's Sustainable Workforce Strategy embeds inclusion and diversity in to the business. SSEN Transmission run an independent annual survey to capture and respond to employee feedback. SSEN Transmission share economic value through community benefit funds. Fund structures and objectives are designed in collaboration with communities. It is considered that the commitments referred to above will contribute towards meeting those outcomes associated closing the gender pay gap and access to employment, as identified by the Council for this objective.

Moray Council Community Benefit Guidance (2014)

This document was published in 2014 and primarily relates to developments of 50kW and over.

The key principle of this guidance is the local promotion of a national rate for onshore wind community benefits packages equivalent to at least £5,000 per MW per year (index inked for the operational lifetime of the development). Other information related to this process is provided within the guidance document.

This document does not primarily relate to transmission infrastructure development.

However, this addendum has provided information in relation to SSEN Transmission's approach to Community Funds.

Moray Council Community Wealth Building Strategy (2024)

This document was published in 2024 and sets out the Council's approach to CWB in this area.

To summarise, this strategy looks to deliver a vision through 5 objectives that align with the pillars of CWB. These are:

- Objective 1) Spending;
- Objective 2) Workforce;
- Objective 3) Inclusive Ownership;
- Objective 4) Land and property; and
- Objective 5) Finance.

It is important to note that this statement has already provided an extensive overview of the community benefit and CWB initiatives of SSEN Transmission.

As such, it is considered that the information from earlier in this statement can be applied to this CWB strategy.

However, for clarity the relevant points are again set out below.

Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable development, equitable economic opportunities and long-term business resilience.

This is reflected in our Five Pillars of CWB:

1. Inclusive Ownership;
2. Spending;
3. Workforce;
4. Land & Property; and
5. Finance.

SSEN Transmission is committed to CWB and sharing benefits with communities; and to working with partners to support local projects, supply chains and housing solutions (where applicable).

Conclusion

This Addendum has addressed a number of relevant documents published by The Highland Council, Aberdeenshire Council and Moray Council in relation to Community Benefit and CWB and objectives related to energy development.

Sufficient information has been provided to show how the business is working in the area and takes into consideration recent documents and strategies prepared by the local authorities where the development is to take place.

Overall, there is a clear demonstration of the business and applicant commitment to Community Benefits and CWB.

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