

VOLUME 1: CHAPTER 12: SOCIO-ECONOMICS, TOURISM AND RECREATION

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12. SOCIO-ECONOMICS, TOURISM AND RECREATION

12.1 Executive Summary

- 12.1.1 This Chapter considers the predicted effects on socio-economic, tourism and recreation activity during construction and operation of the Proposed Development.
- 12.1.2 The Proposed Development is expected to generate 68.0 person years of employment (PYEs) at the regional level (Aberdeenshire), and a further 153.4 PYEs at the national level (across Scotland), over the construction phase of the project. This equates to a gross value added (GVA) injection of £5.5 million at the Aberdeenshire level and £13.4 million in the rest of Scotland. When taking multiplier effects into account, the total employment effects during construction will be 104.1 PYEs (with a GVA effect of £9.6 million) at the regional level and a further 294.5 PYEs nationally (with a further GVA effect of £30.1 million). When adding the Aberdeenshire figures and the rest of Scotland figures, the total direct impact is 221.4 PYE and a GVA impact of £18.9 million. When multipliers are taken into account, the total impacts at the Scottish level are 398.6 PYEs and a GVA effect of £39.7 million. These do not include impacts outside of Scotland. Around 25% of the Scottish benefits will benefit Aberdeenshire. A significant proportion of benefits will be contained within the local area due to the existing travel to work containment levels.
- 12.1.3 The assessment demonstrates that there are beneficial socio-economic effects across the construction and operational phases of the Proposed Development. For example, the local economy would be supported by the Proposed Development through direct and indirect employment and expenditure opportunities. As no specific mitigation measures are proposed in relation to potential socio-economics effects during the construction or operational phase, the predicted residual construction (temporary) effects of the Proposed Development on the economy are deemed to be **Minor Beneficial** and not significant at the national and regional level. The residual operational effects of the Proposed Development on the economy are deemed to be **Negligible** and not significant at both the regional level and at the national level.
- 12.1.4 The review of the tourism asset base includes a review of the notable visitor attractions across Aberdeenshire and locally. None of these are located close to the Proposed Development. The residual construction and operational effects of the Proposed Development on tourism and recreational receptors are deemed to be **Negligible** and not significant.
- 12.1.5 There are potential beneficial effects in relation to the construction and operation phases of the Proposed Development, both in direct economic and employment benefits, in the context of the cumulative sites. In terms of direct economic and employment benefits, the predicted residual cumulative effect during construction is deemed to be temporary **Moderate Beneficial** and significant. It is likely that there would be other local operational employment opportunities as a result of the other consented energy developments, however, these are relatively limited in nature and as such a **Negligible** and not significant residual cumulative effect is predicted.
- 12.1.6 It is possible that the construction of the Proposed Development simultaneously with other schemes nearby could lead to a greater decrease in the availability of tourist accommodation within the area surrounding the site, particularly as there are limited accommodation opportunities within the local area. However, it is unlikely that this would cause a significant effect, and businesses would benefit during the 'off peak' season when there would usually be less demand for accommodation, therefore, a **Minor Beneficial** and not significant residual cumulative effect during construction is predicted. Cumulative effects in tourism and recreational terms during operation are expected to remain **Negligible** and not significant, as there is no reliable evidence that tourists are dissuaded from visiting an area where there are investments in renewable energy and associated infrastructure.
- 12.1.7 The Applicant has committed to maximise the economic opportunities for the local area, businesses and communities in the Aberdeenshire Council area where possible, with commitment to using the local supply

chain where feasible. The Applicant's principal contractors are also encouraged to do the same. The Applicant brings a track record in supporting local causes and community investments through its investments and operation and this would also be the case in terms of the Proposed Development.

12.2 Introduction

- 12.2.1 This Chapter reports on the assessment of the potential significant effects, including cumulative effects, of the Proposed Development on socio-economics, tourism and recreation during construction and operation.
- 12.2.2 The Proposed Development is described in **Chapter 3: The Proposed Development** and would consist of the construction and operation of approximately 19 km of single circuit 132 kV Overhead Line ("OHL") supported on steel trident poles between the consented Glendye Wind Farm on-site substation and the existing Fetteresso substation in Aberdeenshire.
- 12.2.3 The assessment has been carried out in line with Scottish Government policy as set out in National Planning Framework 4¹ and specific guidance on 'Net Economic Benefit and Planning'². These planning policies and guidance highlight how the net economic benefit generated by a development can be assessed as a material consideration in the decision-making process.
- 12.2.4 The assessment considers the likely significance of effects of the Proposed Development on the economy in both quantitative and qualitative terms. In particular, it considers the effects of the Proposed Development on employment and economic output, as well as recreational and tourism assets and activities.
- 12.2.5 The assessment describes the methods used to assess impacts, the socio-economic and tourism baseline conditions, and the potential impacts of the Proposed Development during the construction and operational phases. The wider, less tangible and longer-term economic benefits of the Proposed Development are also assessed.
- 12.2.6 This Chapter has been compiled by MKA Economics, who specialise in appraising economic viability, socio-economic value, and advising on the delivery of economic development projects. A table presenting relevant qualifications and experience is included in **Appendix 5.1: EIA Team**.

12.3 Scope of Assessment

Study Area

- 12.3.1 The Study Area encompasses the area over which all desk-based data were gathered to inform the assessment presented in this Chapter. The Proposed Development is situated in Aberdeenshire, in the Kincardine and Mearns area.
- 12.3.2 The Study Area for both the baseline and impact assessment for socio-economic effects define the regional area as the Aberdeenshire Council area (as the local planning authority) and the national level impacts are presented for Scotland as a whole.
- 12.3.3 In terms of the tourism assessment, a review of the VisitAberdeenshire (which covers Aberdeen and Aberdeenshire area) has also been completed, as well as a more sub-regional (or local) assessment of Kincardine and Mearns. This has been defined according to travel distances from the Proposed Development, as sourced from AA Route Planner³, as this is the most likely mode of transport for people visiting these attractions in this location.

¹ Scottish Government (2023). National Planning Framework 4

² Scottish Government (2016). Net Economic Benefit and Planning

Consultation Responses

- 12.3.4 The scope of the assessment has been determined through a combination of professional judgement, reference to relevant guidance documents and consultation with stakeholders through a formal EIA scoping process and pre-application advice and is based on the formal Scoping Opinion provided by Scottish Ministers in February 2025.
- 12.3.5 **Table 12.1** summarises the relevant socio-economic, tourism and recreation responses as part of the Scoping Opinion and provides information on where and / or how points raised have been addressed in this assessment. Full details on the consultation responses and Scoping Opinion can be reviewed in **Chapter 4: Scope and Consultation**, and associated appendices.

Table 12.1: Scoping Responses relevant to Socio-economic, Tourism and Recreation

Consultee	Response	Action
Aberdeenshire Council	The Council agrees with the proposal that assessment in the EIA Report will consider the implications of any effects identified for the tourism sector in the local area and wider region. These issues are likely to be of interest to the local communities. Aberdeenshire Council's Economic Development Team are working on their "Charter for Energy Development in Aberdeenshire". This draft guidance is likely to be adopted in the coming months and sets out the community wealth building expectations and principles to ensure alignment with policies 11 and 25 contained within NPF4 for energy development in Aberdeenshire.	This Chapter sets out the socio-economic and tourism baseline position and includes an assessment in terms of economic (jobs, turnover and Gross Value Added (GVA)) and social impacts, and the wider community impacts as a result of the Proposed Development. The Charter for Energy Development in Aberdeenshire⁵ has been reviewed as part of this assessment.

Scope of Assessment

- 12.3.6 In terms of economic effects, as noted above, this assessment has employed appraisal techniques consistent with those outlined in the Scottish Government's latest NPF4 policy and guidance on 'Net Economic Benefit and Planning', and also Scottish Enterprise's Impact Appraisal and Evaluation Guide⁴ for the appraisal of economic development initiatives. In terms of community effects, the assessment has reviewed Aberdeenshire Council's latest Charter for Energy Development in Aberdeenshire⁵.
- 12.3.7 This assessment calculates both construction and operational employment associated with the Proposed Development, and the economic effects this would have on the economy, at both a country and local authority level.

⁴ Scottish Enterprise (2024). Impact Appraisal and Evaluation Guidance.

⁵ Aberdeenshire Council (2025). Charter for Energy Development in Aberdeenshire.

12.3.8 This assessment outlines the role the Proposed Development can play in supporting national and regional economic development policies and strategies. It presents an overview of the local economic conditions to set the development context for the Proposed Development. It outlines the potential benefits of the Proposed Development on employment, investment, local spending, community development and the local business base, during construction and operation at the regional level. This includes an assessment of the effects on the tourism asset base and draws on the findings from a review of secondary data sources and a mapping of these assets in relation to the Proposed Development. Finally, it provides an assessment of the residual effects of the Proposed Development at construction and operational phases on the economy and the tourism asset base.

12.4 Legislation, Policy and Guidance

12.4.1 This assessment has been completed in line with NPF4, the national spatial strategy for Scotland. NPF4 has an increasing importance in supporting the development of new renewable energy technologies as the overarching energy policy (Policy 11) states:

“To encourage, promote and facilitate all forms of renewable energy development onshore and offshore. This includes energy generation, storage, new and replacement transmission and distribution infrastructure and emerging low-carbon and zero emissions technologies including hydrogen and carbon capture utilisation and storage (CCUS)”

12.4.2 There is also specific reference in relation to 'net economic impact' for renewable energy proposals at Policy 11(c) of NPF4, which states:

“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.”

12.4.3 Policy 11(c) of NPF4 builds on the previous guidance 'Net Economic Benefit and Planning'⁶, which stated:

“...assessing the additional benefit from a proposal will usually involve making some assumptions, and is therefore not an exact science. It is important that the level of detail of any assessment is kept proportionate to the likely scale of the net economic benefit, and that assumptions made are completely transparent, evidence-based and as accurate as possible”.

12.4.4 The assessment has also taken cognisance of national economic strategy (National Strategy for Economic Transformation⁷) which deliberately focuses in on five policy programmes with the greatest potential benefit, including to: *“...strengthen Scotland's position in new markets and industries, generating new, well-paid jobs from a just transition to net zero”.*

12.4.5 The transition to net zero is seen not just an environmental imperative but an economic opportunity - one where Scotland will become world leading. The identified opportunities for this competitive advantage include the construction and development of onshore and offshore energy generating technologies.

12.4.6 This transition is further endorsed and supported by Scotland's Green Industrial Strategy⁸, which has the mission 'to ensure that Scotland realises the maximum possible economic benefit from the opportunities created by the global transition to net zero'. The strategy shows how, with the right focus, support, investment and partnerships, Scottish businesses and workers can innovate, capture new markets, create new jobs and diversify the workforce, solve problems with new products – and sell their expertise to the world.

⁶ Scottish Government (2016). Net Economic Benefit and Planning

⁷ Scottish Government (2022). National Strategy for Economic Transformation

⁸ Scottish Government (2024). Green Industrial Strategy

12.4.7 A refresh of the Regional Economic Strategy was developed in 2024⁹. This new Strategy captures the ambition and opportunity for North East Scotland. It provides a vision and route map for the future of the North East of Scotland's economy, with the vision being:

“Our vision is for a regional economy that enables us to thrive. It is leading a just energy transition, diversifying our economy, enabling entrepreneurship and innovation, and delivering a wellbeing economy for our people - a post fossil-fuel future.

and

By 2035, our economy will be leading the transition to and production of future energy solutions, new green energy and will be diversifying through growth in our digital technology, food and drink, tourism, life sciences and creative sectors.”

12.4.8 The Proposed Development has been designed in line with Aberdeenshire Council's new Charter for Energy Development in Aberdeenshire¹⁰. This Charter sets out what Aberdeenshire Council expects from energy development including renewables and infrastructure and how in return the Council will enable this contribution.

12.4.9 It aims to:

- Embed an approach to community wealth building into Aberdeenshire;
- Provide a guide for developers as to how to meet the policy requirements of NPF4 and deliver maximum benefit for affected communities;
- Engage all relevant stakeholders in identifying how to maximise socio economic benefits; and
- Unlock economic opportunities for the area.

12.4.10 Aberdeenshire Council wishes to work with energy companies wishing to develop renewables and associated infrastructure to the mutual benefit of all concerned and most importantly, the communities affected. In order to maximise the socioeconomic benefit, Aberdeenshire has identified seven Collaboration Principles for developers outlining the areas where strategic investments and dialogue can be directed:

1. Provide a long-term and collaborative programme on skills development
2. Community capacity
3. Fuel poverty
4. Supply chain
5. Inward investment
6. Adopt a town centre first approach
7. Place

12.4.11 This assessment has been completed to set out how the Proposed Development can help deliver community benefits and embraces community wealth building principles.

12.4.12 SSEN Transmission has their own Strategy within their current Business Plan¹¹, which set the following Purpose and Vision:

“Our Purpose is to power communities to thrive today and create a net zero tomorrow. This has never been more critical as we not only keep the lights on for our communities through storms and floods, but also more

⁹ Aberdeen City Council, Aberdeenshire Council and Opportunity North East (2024). Regional Economic Strategy,

¹⁰ Aberdeenshire Council (2025). Charter for Energy Development in Aberdeenshire

¹¹ SSEN (2021). ED2 Business Plan

and more people need connections, drive EVs, and install heat pumps, so the demand for clean electricity is increasing massively.”

“Our Vision is that we can power change with every connection. Changing today with network improvements and changing tomorrow as we build a network for net zero and new connections. Connections to that network, but also connections through partnerships, with our customers, our communities and stakeholders. All of us have a key role in making this happen, while making sure we all get home safe and protect our environment.”

12.4.13 SSEN Transmission’s strategy does not stand or operate alone, the company has numerous supporting or functional strategies that set out what SSEN Transmission aims to achieve in much more detailed plans. These strategies and plans are reviewed and refreshed on a regular basis. These include, but not limited to:

- Climate Resilience Strategy;
- DSO Action Plan;
- Consumer Vulnerability Strategy; and
- Housing Strategy

Tourism

12.4.14 In terms of tourism, VisitAberdeenshire launched a 2030 Strategy in 2022¹², which seeks for ‘Aberdeen and Aberdeenshire to become Scotland’s leading visitor destination by 2030:

- Setting the pace for sustainable growth with visitors staying longer and spending more;
- Pioneering tourism business innovation;
- Being at the vanguard of delivering unique, high-quality visitor experiences; and
- Going above and beyond customer expectations.

12.5 Methodology

12.5.1 There are no published standards or guidelines that set out a preferred methodology for assessing the likely socio-economic or tourism impacts of energy proposals, including grid connection projects. The methods applied within this assessment are therefore based on established best practice, including commonly used methodologies and recognised approaches to quantifying economic impacts both during the construction of a development and following their completion

12.5.2 In terms of economic impacts, this assessment has employed appraisal techniques consistent with those outlined in the Scottish Enterprise Impact Appraisal and Evaluation Guide¹³. The assessment is also consistent with the Scottish Government’s Draft Advice Note on Economic Benefit and Planning¹⁴.

12.5.3 The relevant policy context and methods used to assess the impacts are described together with the baseline conditions that would exist in the area in the absence of the Proposed Development.

12.5.4 The assessment has contextualised the Proposed Development both in terms of Scottish and local renewable and energy policy and identified where the Proposed Development fits within policy as well as its facilitating towards renewable targets.

12.5.5 In terms of the socio-economic assessment, this utilised investment figures for construction and operation from SSEN Transmission, and converted them to GVA from proxies for Aberdeenshire the Scottish Annual Business

¹² VisitAberdeenshire (2022). A Framework for Growth 23022 – 2030

¹³ Scottish Enterprise (2016). Impact Appraisal and Evaluation Guide

¹⁴ Scottish Government (2016). Net Economic Benefit and Planning

Statistics¹⁵. In order to assess the spatial effects, SSEN Transmission has provided an estimate of the likely impacts at the local (Aberdeenshire) and Scottish levels, and that benefiting areas outside Scotland. These figures were also subject to a conversion to jobs also through local proxies from the Scottish Annual Business Statistics. Multiplier effects were also considered, and these were sourced from the Scottish Government's Supply, Use and Input-Output Tables¹⁶. In the absence of local multipliers, the national multipliers have been reduced by 50% to ensure the local multiplier effects are not over estimated. As an ex-ante appraisal, it should be noted that these industry facing assumptions are estimates and the actual effects will be dependent on local and Scottish companies successfully competing for and completing project contracts.

12.5.6 The Proposed Development is not expected to generate any full time employment onsite. The effect of operation expenditure on the Aberdeenshire and Scottish economies is therefore not assessed in the economic assessment.

12.5.7 The assessment considers potential impacts across the construction and operational (maintenance) phases of the Proposed Development. The long-term impacts associated with the decommissioning phase of the Proposed Development are not assessed. Although the Proposed Development could also have socio-economic impacts at decommissioning phase it is difficult to predict what local economic conditions would be at the time of decommissioning, therefore arriving at evidence-based and accurate assumptions is not realistic. Should full decommissioning take place the effects are likely to be short term and similar in nature but substantially lesser than construction effects. Consent to be applied for is in perpetuity (see **Section 3.15 of Chapter 3: The Proposed Development**).

12.5.8 As there are no published standards or technical guidelines that set out a preferred methodology for assessing the likely socio-economic or tourism impacts of a project of this nature, professional judgement, with reference to commonly used methodologies, and recognised approaches to quantifying economic impacts, is used to determine the significance criteria, as set out in **Table 12.2**.

Table 12.2: Significance Criteria

Significance	Description
Major	Major loss / improvement to key elements / features of the baseline conditions such that post development character / composition of baseline condition will be fundamentally changed. For example, a major long-term alteration of socio-economic conditions, a major reduction / improvement of tourism assets, or a substantial change to tourism spend.
Moderate	Loss / improvement to one or more key elements / features of the baseline conditions such that post development character / composition of the baseline condition will be materially changed. For example, a moderate long-term alteration of socio-economic conditions, a moderate reduction / improvement in the tourism asset base, or a moderate change to tourism spend.
Minor	Changes arising from the alteration will be detectable but not material; the underlying composition of the baseline condition will be similar to the pre-development situation. For example, a small alteration of the socio-economic conditions, a small reduction / improvement in the tourism asset, or a small change in tourism spend.
Negligible	Very little change from baseline conditions. Change is barely distinguishable, approximating to a "no change" situation.

¹⁵ Scottish Government (2022). Scottish Annual Business Statistics.

¹⁶ Scottish Government (2024). Supply, Use and Input-Output Tables

12.5.9 In assessing significance, consideration is given to the national and regional baseline situation. The magnitude of the effect is determined in proportion to the area of effect relevant to each receptor. For the purpose of the assessment, a Moderate or Major effect is deemed to be 'significant' in terms of the EIA Regulations. This is consistent with guidance set out by the Institute of Environmental Management and Assessment (IEMA)¹⁷ and NatureScot¹⁸.

12.5.10 In terms of socio-economic factors, potential effects would be significant if the Proposed Development resulted in fundamental or material changes in population, structure of the local community or local economic activity.

12.5.11 The effect of the Proposed Development on tourism and recreation is closely related to public attitudes on green energy technologies, however, a negative opinion does not necessarily result in a material change in recreational patterns.

12.5.12 The impacts draw on information supplied by the Applicant and verified by MKA Economics. The calculation of effects are based on professional judgement, appraising them against other related developments and calculating them through the use of industry proxies.

12.6 Baseline Conditions

12.6.1 A desk-based review of publicly available information has been undertaken to identify the key characteristics of the local economy. This is based on a review of Aberdeenshire Council information on the Committee Area of Kincardine and Mearns and the sub-regional (Intermediate Datazone) area of Fetteresso, Netherley and Catter. For recreation and tourism, the study area is more local, in terms of assessing some of the key tourism and recreational assets and activities which are in close proximity to the Proposed Development.

Socio-economic Baseline

12.6.2 The headline socio-economic baseline findings are summarised for Kincardine and Mearns below. This is based on a review of datasets from the Office of National Statistics (ONS) as presented on Nomisweb¹⁹.

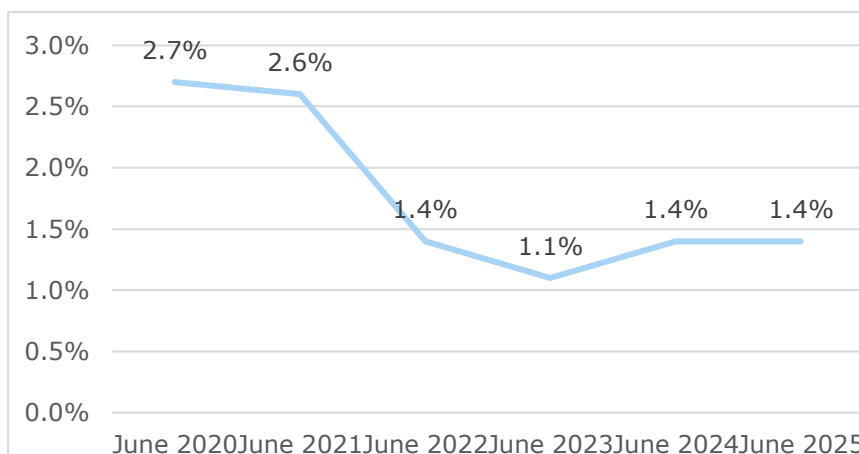
- Kincardine and Mearns has a population of 46,711, which represents 18% of the total regional population (263,717). The main settlements are Stonehaven (10,928), Portlethen (8,648) and Laurencekirk (3,039).
- Kincardine and Mearns has around 17% of the number of dwellings in Aberdeenshire, and has witnessed a 10% increase in the number of dwellings over the period from 2013 to 2023.
- Kincardine and Mearns has an average median income of £48,543, compared to the Aberdeenshire average of £41,756.
- The latest annual unemployment rate (2024) in Kincardine and Mearns was 1.4%, compared to 1.8% for Aberdeenshire. The local unemployment rate has historically been below the regional level. The regional rate is also below the national level.
- Manufacturing is the single largest economic sector, representing 14.3% of the economy, compared to 13.0% regionally. Professional, Scientific and Technical represents 10.4% of the local economy, compared to 11.9% at the regional level.

¹⁷ Institute of Environmental Management and Assessment (2009) Environmental Impact Guide

¹⁸ NatureScot (2018) Environmental Impact Assessment Handbook

¹⁹ <https://www.nomisweb.co.uk/>

Plate 12.1: Kincardine and Mearns Unemployment June 2020 – June 2025²⁰



Source: Nomisweb 2025

12.6.3 Unemployment fell over the period from June 2021 to June 2023, although it has risen slightly through 2024 and 2025. Unemployment remains low, and considerably below the Aberdeenshire (1.9%) and Scottish positions (3.1%).

12.6.4 It can be seen that the local area has been growing over the last ten years, with a 10% increase in the number of new homes. The local area traditionally has unemployment levels below the regional average and the region has lower rates than the national level. Average income levels are also higher locally.

12.6.5 In terms of the intermediate area surrounding the Proposed Development of Fetteresso, Netherly and Catter, the following can be summarised:

- The population in the area increased by 28.7% between 2014 and 2021 - the 2nd highest growth rate in Aberdeenshire over that period.
- In terms of age groups, increases were registered across the board. In most cases the growth rates were among the highest in Aberdeenshire. Although the 70-79 age group increased by 34.1%, this was a relatively modest rise in the context of Aberdeenshire.
- The local area is home to a relatively large child and working age population, and a correspondingly small elderly population. Given that a high proportion of residents were categorised as belonging to Social Grades AB, it suggests that this local area is one of the 'youngest' and most affluent in Aberdeenshire.
- In terms of household income, the rate in Fetteresso, Netherley and Catter is among the most affluent in Aberdeenshire. The median household income in 2023 equated to £55,399 which is £13,643 higher than the Shire average (£41,756).
- Median household income ranges from £49,862 to £58,944 locally. Approximately 1.8% of households in the local area earn less than £10,000 per year, which is lower than average (5.3%).
- High income households are scattered throughout the local area, with high concentrations surrounding the general Chapelton/Netherley area. Households along the southern coastline also tend to be associated with higher incomes.
- The number of people claiming Universal Credit (UC) who are also in employment has remained relatively steady over the last few months, contrary to the Shire-wide trend, which has increased. Latest figures show 2.6% of people aged 16-64 (who also have jobs) are claiming UC. This is lower than the regional rate for Aberdeenshire as a whole. A similar picture emerges in relation to people on UC and not in employment.

²⁰ Nomisweb (2025), ONS Claimant Count – www.nomisweb.co.uk

- Like Aberdeenshire, the unemployment rate in the local area has fallen substantially since the September 2020 peak of 3.3%. Latest data suggests approximately 1.2% of the Working Age population is currently out-of-work, which is slightly lower than the Aberdeenshire rate (1.8%).
- Children living in low-income families is among the lowest in Aberdeenshire. However, after a dip last year, numbers have continued to slightly rise, sustaining the longer-term trend.
- The employment numbers per broad industrial group relate to the kind of jobs within the area, which may be filled by those living outside the local area. Employment is generally spread among three main sectors, Manufacturing, Construction and the Professional sectors.
- Common job types relate to food product manufacturing; treatment and coating of metals; road/rail construction; and architectural and engineering activities. These job types account for about 45% of the total jobs in the area.
- The area is home to a number of large enterprises with turnover of at least £500,000. They tend to be associated with Agriculture, and mining and quarrying (which includes oil & gas).
- At 0.11 dwellings per hectare, the local area is on the more rural side of the spectrum, with fewer properties per hectare relative to other local areas in the Shire. This is despite the fact that the general area has seen the numbers of dwellings increase by over 39% since 2015.
- Like the population increase seen over a similar period, this is the 2nd highest growth rate in Aberdeenshire - thanks largely to the Chapelton of Elswick housing project. Longer term, the Chapelton site can reportedly accommodate up to 8,000 houses within seven neighbourhoods.
- A relatively large proportion of the dwellings in this area fall within Council Tax Bands F-G. The 45.9% figure is among the highest in Aberdeenshire. A similar picture emerges in terms of dwellings in Bands D-E. Consequently, the area is home to relatively few properties in Bands A-C.
- The median house price is £317,495, one of the highest figures in the Shire and some £106,500 higher than the average (£210,995).
- In terms of the Scottish Index of Multiple Deprivation (SIMD), Fetteresso, Netherly and Catter is the 5,407 least deprived wards of all 6,976 wards in Scotland.

12.6.6 Although the local area cannot be deemed to be deprived and can be seen as a relatively affluent area, this disguises the 'geographic access' domain, and the local area is amongst the 10% most geographically deprived areas in Scotland. Geographically deprived areas are areas where there is limited public services, and often communities in these areas face challenges accessing services, transportation challenges and lack of high speed broadband. Rural deprivation is often exacerbated with higher fuel and transport costs.

12.6.7 In terms of skills at the regional (Aberdeenshire) level, the area has a higher proportion of highly skilled residents with 58.8% having the highest skills (Regional Qualifications Framework 4 and above) compared to 53.7% at the Scottish level.

12.6.8 As reported in Skills Development Scotland's Regional Skills Assessment²¹, the total number of people employed in the sectors that will make a significant contribution to Net Zero in Scotland was estimated to be 679,200 in 2024. The Aberdeen City and Shire region was estimated to account for 16% of Scotland's total (or 110,900 people). Of the sectors of most importance to the transition, Energy and Waste Treatment was the largest employing sector (42%) in the region.

12.6.9 Aberdeenshire is historically an area of relative affluency in Scotland and has only 3% of its datazones in the most deprived 20% of Scottish data zones. Poverty in Aberdeenshire is centred around Fraserburgh and Peterhead and to a lesser extent Banff and Macduff. Aberdeenshire is the 4th least deprived local authority, of 32 local authorities, in Scotland.

²¹ Skills Development Scotland (2024). Regional Skills Assessment

12.6.10 In terms of labour market dynamics, the local area benefits from being close to a number of large labour market pools. The council areas of Aberdeenshire and Aberdeen City approximately correspond with the Travel to Work Areas for Aberdeen, Peterhead, Fraserburgh, and Turriff and Banff²². As such, the combined Aberdeenshire and Aberdeen City council areas have been used to determine the level of local employment.

12.6.11 The proportion of the workplace population of Aberdeen City and Aberdeenshire that consists of residents from Aberdeen City and Aberdeenshire is 93.0%, whilst the proportion that commutes from the rest of Scotland is 5.0%. The remaining 2.1% commute to the area from the rest of the UK²³.

12.6.12 It is noteworthy that there is a strong bias towards commuters from Aberdeenshire travelling into Aberdeen City rather than the reverse. As such, employment opportunities in Aberdeenshire are far more likely to be filled by residents from Aberdeenshire rather than those from Aberdeen City. Furthermore, the level of containment in the Aberdeenshire and Aberdeen City area is likely as a result of the significant size of Aberdeen as an economic and employment hub, with the next nearest large city, Dundee, located more than 50 miles to the southwest.

12.6.13 On this basis, it can be assumed that a significant proportion of employment and resultant GVA effects from the Proposed Development will be absorbed within the region of Aberdeen City and Aberdeenshire.

Local Economy and Tourism Baseline

12.6.14 An overview of the tourism economy is summarised in the following paragraphs.

12.6.15 Sustainable tourism (which is one of the six growth sectors defined in the Scottish Government's Growth Sector Database²⁴) employed 8,000 people across Aberdeenshire in 2023 and the sector generated £170 million in GVA in 2022. GVA generated by sustainable tourism in Aberdeenshire was approximately 4% of the value added by the sustainable tourism sector in Scotland (£4.8 billion) and employment was 3% of total Scottish employment in the sustainable tourism sector (total Scottish employment being 245,000). Over the period from 2016 to 2022, the economic value of the tourism sector in Aberdeenshire increased by 13%, compared to 23% nationally.

12.6.16 As well as not growing as quickly, the tourism sector is relatively less important in Aberdeenshire than on average in Scotland. The sector accounts for 2% of GVA and 10% of employment, compared to 4% and 14% respectively at the national level. Although an important sector, it is not as valuable as recorded at the national level, and compared to other regions such as Highlands, Perth and Kinross and Argyll and Bute.

12.6.17 The recent Scotland Visitor Survey²⁵ found the following about the latest trends in tourism in Aberdeenshire, which includes Aberdeen and Moray:

- 1.35 million total overnight visits by international and domestic visitors in 2023;
- 6.93 million total nights spent in accommodations by international and domestic visitors in 2023;
- £410 million total overnight spend by international and domestic visitors in 2023;
- £305 average overnight visitor spend in 2023;
- 41% were domestic visitors, and 59% were international visitors;
- Aberdeenshire visitors stayed on average 10.3 nights in Scotland including 2.9 nights in Aberdeenshire;
- 15% of visitors to Aberdeenshire, stayed only in Aberdeenshire, with 85% touring around Scotland;
- 36% were first time visitors and 64% were repeat visitors;

²² Office of National Statistics (2019). Travel to Work Areas

²³ Office of National Statistics (2011). WU01UK - Location of usual residence and place of work by sex

²⁴ Scottish Government (2024). Growth Sector Database

²⁵ VisitScotland (2023). Scotland Visitor Survey - Aberdeenshire Factsheet

- 15% were on a 'trip of a lifetime' and 28% were on a 'special holiday or short break';
- In terms of the top reasons for visiting, 72% noted the 'scenery and landscape' (compared to 70% nationally), 60% were there for the 'history and culture' (compared to 48% nationally) and 27% were there for 'visiting friend and family' (compared to 22% nationally);
- 77% stayed in serviced accommodation, with 68% of these in hotels, 9% in guesthouses and 2% in hostels. 22% stayed in non-serviced accommodation, 15% in self-catering accommodation and 8% staying with friends or family. These total more than 100 % due to some visitors staying in more than one accommodation type during their stay;
- 54% of visitors gave 9 or 10 out of 10 for the 'overall welcome', compared to 62% nationally. 31% of visitors gave 9 or 10 out of 10 for the 'value for money of accommodation', compared to 42% nationally; and
- Some of the most popular attractions in the Aberdeen and Aberdeenshire are located more than 10 miles by road from the Proposed Development, as presented in **Table 12.3** below.

Table 12.3: Main Visitor Attraction in Aberdeen and Aberdeenshire

Description	Annual Visitor Numbers	Distance
Free		
Duthie Park	1,007,982	17 miles
David Welch Winter Gardens	297,367	18 miles
Scottish Dolphin Centre	94,993	77 miles
Bennachie Forest	86,234	38 miles
Aberdeen Maritime Museum	78,415	19 miles
Paid		
Crathes Castle	153,217	14 miles
Brodie Castle	79,634	97 miles
Pets Corner	71,660	20 miles
Fyvie Castle	66,039	45 miles
Castle Fraser	56,822	28 miles

Source: VisitScotland

12.6.18 The area within which the Proposed Development is situated is fairly remote, with the nearest settlement, and visitor attractions, being Stonehaven, around five miles to the east of the Proposed Development. Stonehaven is a harbour town, famous for its Hogmanay fireballs ceremony. Stonehaven has a sheltered working harbour busy with sailing yachts. Stonehaven Tolbooth Museum is a notable building on the quayside, and has a fascinating history as a former courthouse and jail. Two miles to the south is the ruined Dunnottar Castle, which is estimated to attract around 100,000 visitors per annum. Just south of Stonehaven is the RSPB Fowlsheugh reserve, with 130,000 breeding seabirds in the spring and summer. Also in Stonehaven is the Open Air Pool, which attracted 40,000 visitors in 2024 and generated almost £1 million for the local area. Stonehaven also offers a range of local shops, restaurants and accommodation provision, including hotels, guest houses, self-catering properties and a large caravan and camping site.

12.7 Assessment of Likely Significant Effects

- 12.7.1 This part of the Chapter sets out the predicted socio-economic, recreation and tourism impacts arising from the construction and operation of the Proposed Development.
- 12.7.2 The areas of focus are within the Aberdeenshire local authority area, as well as Scotland as a whole, and include:
- Total levels of investment across the capital expenditure (CAPEX) phases and operation expenditure (OPEX) phase;
 - Direct impacts arising from the investment, in terms of employment and GVA impact;
 - Wider economic impacts arising from the direct impacts, using economic multipliers in terms of employment and GVA; and
 - Tourism and recreational effects based on a review of secondary research, a review of the tourism assets from a site visit and a review of **Chapter 6 Landscape and Visual** of this EIA Report.

Socio-economic Effects

Construction

- 12.7.3 The total construction employment was estimated by the Applicant and their technical advisers. The amount of construction employment provided by the Proposed Development has been estimated using 'person years of employment' (PYE) derived from the average turnover per employee in the civil engineering industry in Aberdeenshire and across Scotland.
- 12.7.4 This is a method whereby the number of people on-site over the whole construction period (whether full-time / part-time, permanent, temporary or seasonal) can be estimated as PYEs. PYE is the same as 'job years', in that it is one person working full time for one year.
- 12.7.5 The development and construction of the Proposed Development would involve substantial capital investment. A portion of this investment, proposed by SSEN Transmission, will be allocated to regional, Scottish, and UK companies, leading to increased turnover within these regions.
- 12.7.6 The Applicant provided a breakdown of the Proposed Development investment. Based on this, assumptions were made about how the expenditure could be allocated across different categories. For each category, estimates were developed regarding the proportion of contracts that might be secured in each area and the relevant sectors for those contracts. These assumptions were informed by the Applicant's experience with similar projects and MKA Economics' expertise in the sector.
- 12.7.7 An Input-Output economic model 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 2022²⁶. Sectoral allocation of contract categories was based on a mapping of each contract against a level 2 Standard Industrial Classification (SIC) code²⁷.
- 12.7.8 The construction phase was split into three future phases by SSEN including development works in terms of initial development, full construction and installation of the grid equipment. These future contract value estimates were supplied by SSEN.

²⁶ Scottish Government (2022). Scottish Annual Business Statistics

²⁷ Office for National Statistics (2007). Standard Industrial Classification of Economic Activities

12.7.9 It was estimated that the Proposed Development could generate £5.5 million direct GVA in Aberdeenshire and £18.9 million direct GVA in Scotland. These do not include impacts outside of Scotland. Around 30% of the Scottish benefits will benefit Aberdeenshire, as it is in the development phase where there is expected to be the main contract and sub-contract opportunities for local businesses. Aberdeenshire based companies will have the opportunity to tender for activities across all phases.

Table 12.4: Direct GVA by Contract Category (£m)

	Aberdeenshire	Scotland
Development	3.3	6.3
Construction	0.3	2.0
Installation	1.9	10.6
Total Direct GVA	5.5	18.9

12.7.10 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 Proposed Development could support 68.0 direct years of employment in Aberdeenshire and 221.4 direct years of employment in Scotland. These do not include impacts outside of Scotland. Around 30% (£5.5 million of £18.9 million) of the Scottish benefits will benefit Aberdeenshire. As noted in **paragraph 12.6.10 to 12.6.13** a significant proportion of benefits would be contained within the local area due to the existing travel to work containment levels.

Table 12.5: Direct Employment by Contract Category (PYE)

	Aberdeenshire	Scotland
Development	40.7	73.6
Construction	4.2	23.0
Installation	23.1	124.8
Total Direct Employment	68.0	221.4

12.7.11 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 2 economic multipliers²⁸.

12.7.12 It was estimated the GVA impact associated with the multiplier effects could generate £4.1 million GVA in Aberdeenshire and £20.8 million GVA in Scotland.

Table 12.6: Multiplier GVA by Contract Category (£m)

	Aberdeenshire	Scotland
Development	2.4	6.9
Construction	0.3	2.2
Installation	1.4	11.7
Total Multiplier GVA	4.1	20.8

12.7.13 It was estimated the employment impact associated with the multiplier effects could support 36.1 years of employment in Aberdeenshire and 177.2 years of employment in Scotland.

Table 12.7: Multiplier Employment by Contract Category (PYE)

	Aberdeenshire	Scotland
Development	21.6	58.9
Construction	2.3	18.4
Installation	12.2	99.9

²⁸ Scottish Government (2021). Supply, Use and Input-Output Tables

	Aberdeenshire	Scotland
Total Multiplier Employment	36.1	177.2

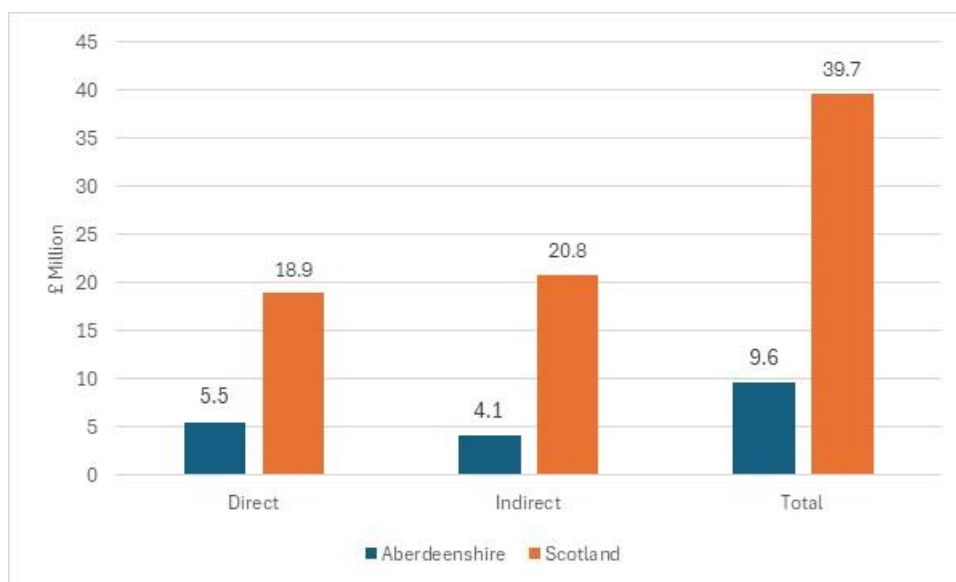
12.7.14 The combined direct, indirect, and induced impacts of the development and construction of the Proposed Development are estimated to generate a total of £9.6 million GVA and 104.1 years of employment in Aberdeenshire and £39.7 million GVA and 398.6 years of employment in Scotland. These do not include impacts outside of Scotland. Around 25% of the Scottish benefits will benefit Aberdeenshire

Table 12.8: Total GVA (£m) and Employment Impact (PYE)

	Aberdeenshire	Scotland
Total GVA	9.6	39.7
Total Employment	104.1	398.6

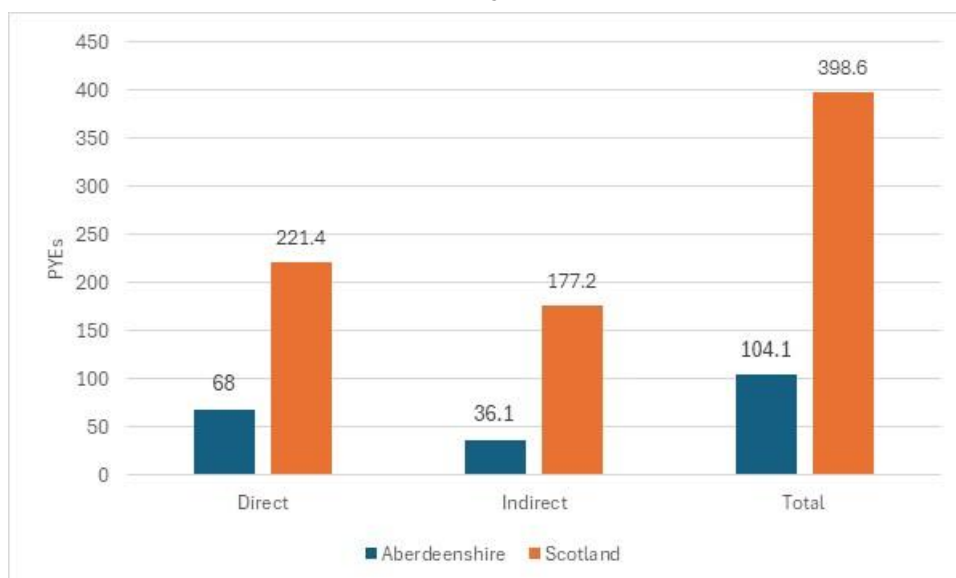
12.7.15 The plate below illustrates the GVA impact at the Aberdeenshire and Scotland levels.

Plate 12.1: Direct, Indirect and Total GVA Effect at Aberdeenshire and Scottish Levels



12.7.16 The plate below illustrates the employment impact at the Aberdeenshire and Scotland levels.

Plate 12.2: Direct, Indirect and Total Employment Effect at Aberdeenshire and Scottish Levels



12.7.17 To fully realise these benefits, developers and stakeholders must actively aim for a high level of local content in their projects. To support this objective, guidance has been developed, offering strategies for developers to maximise local economic benefits. A key resource is RenewableUK's Local Supply Chain in Onshore Wind: Good Practice Guide²⁹. While this is aimed at onshore wind, the principles are applicable to grid infrastructure. It 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.

12.7.18 Integrating these activities and initiatives early in the development process can help maximise local and regional economic opportunities offered by the Proposed Development. SSEN Transmission can commit to these practices to seek to maximise net economic benefits for the regional economy. This is consistent with SSE's own Sustainable Procurement Code³⁰ and Powering Net Zero Pact³¹ which seeks to maximise the social and economic benefits of procurement, we will require all suppliers on large capital projects to demonstrate local social and economic benefits, and to work with local suppliers, investing in jobs and local economies.

12.7.19 It is therefore reasonable to expect that a large number of those employed on the project would be from Aberdeenshire and from across Scotland. This is consistent with SSEN Transmission's own policy and practice, although not a guarantee, of employing local personnel via its appointed contractors.

12.7.20 The main benefits would be associated with the construction phase, as the Proposed Development is not expected to generate any direct full-time employment onsite during its operation. There would however be regular ad-hoc maintenance, as required.

12.7.21 The Proposed Development could also have socio-economic impacts at decommissioning phase. However, it is difficult to predict what local economic conditions would be at the time of decommissioning therefore arriving at evidence-based and accurate assumptions is not realistic. Should full decommissioning take place the effects are likely to be short term and similar in nature but substantially lesser than construction effects. Consent to be applied for is therefore in perpetuity.

12.7.22 Overall, the Proposed Development is expected to generate 68.0 PYEs at the Aberdeenshire level, and a further 153.4 PYEs across Scotland, over the construction phase of the project. This equates to a GVA injection of £5.5 million at the Aberdeenshire level and £13.4 million in the rest of Scotland. When taking multiplier effects into account, the total employment effects during construction will be 104.1 PYEs (with a GVA effect of £9.6 million) at the regional level and a further 294.5 PYEs nationally (with a further GVA effect of £30.1 million). When adding the Aberdeenshire figures and the rest of Scotland figures, the total direct impact is 221.4 PYE and a GVA impact of £18.9 million. When multipliers are taken into account, the total impacts at the Scottish level are 398.6 PYEs and a GVA effect of £39.7 million. As noted earlier, SSEN Transmission will

²⁹ RenewableUK (2024). Local Supply Chain in Onshore Wind: Good Practice Guide

³⁰ SSE (2023). Sustainable Procurement Code: Supplier Guidance Version 1.3. Effective date: September 2023, Review date: September 2024

³¹ SSE (2022). Powering Net Zero Pact

seek to maximise regional economic effects through their own policy of employing local personnel via its appointed contractors.

12.7.23 As noted in **paragraphs 12.6.10 to 12.6.13** a significant proportion of benefits will be contained within the local area due to the existing travel to work containment levels.

12.7.24 Construction is predicted to result in a temporary **Minor Beneficial** and not significant effect at the regional level (i.e. on the economy in Aberdeenshire), and a temporary **Minor Beneficial** and not significant effect on the economy at the national level (i.e. Scotland).

Operation

12.7.25 In general, OHLs require very little maintenance. Regular inspections are undertaken to identify any unacceptable deterioration of components, so that they can be replaced. From time to time, inclement weather, storms or lightning can cause damage to either the insulators or the conductors on OHLs. If conductors are damaged, short sections may have to be replaced. During the operation of the Proposed Development, it may be necessary to manage vegetation to maintain required safety clearance distances from infrastructure. This work is periodic, so it would be very hard to say any of this would be sufficient to fully support and / or sustain additional employment from these activities; essentially, only ad hoc visits to local facilities and occasional accommodation nights. The Proposed Development is not expected to generate any full time employment onsite during its operation, as it will be controlled centrally from the Applicant's Perth headquarters. There is likely to be maintenance contracts but as a new investment these are not expected to be required in the initial period of operation. Therefore, there are no operational impacts to be presented in this assessment.

12.7.26 It should be noted that the Proposed Development would unlock operational benefits by indirectly supporting operational jobs for the consented Glendye Wind Farm.

12.7.27 The effect of operation expenditure on the Aberdeenshire and Scottish economies was assessed as **Negligible** and therefore not significant.

Tourism and Recreational Effects

12.7.28 There have been a number of research exercises completed regarding the opinions of tourists towards wind farms and related renewable energy and transmission infrastructure. The findings from these research studies are summarised in the following paragraphs.

12.7.29 Research was carried out as part of the Scottish Parliament's Economy, Energy and Tourism Committee Inquiry³² into renewable energy targets. Inquiry evidence was based on a review of surveys which appraised the tourist impact of renewable energy projects, including transmission infrastructure.

12.7.30 Overall, the Inquiry concluded *"no witness has provided the Committee with robust, empirical evidence, as opposed to anecdotal comment and opinion, that tourism is being negatively affected by the development of renewable projects."*

12.7.31 The Inquiry also found: *"Whilst care always needs to be taken in terms of the planning process and decisions on the siting of individual projects in areas popular with tourists and in our rural and wild land areas, no one has provided the Committee with evidence, as opposed to opinion."*

12.7.32 These Inquiry findings can be corroborated with more recent national surveys completed by the Department for Energy Security and Net Zero (DESNZ). Their latest Public Attitudes Tracker³³ reported in July 2024 that 84% of people said they supported the use of renewable energy such as wind power, solar energy and biomass to

³² Scottish Parliament (2012). Achievability of the Scottish Government's Renewable Energy Targets

³³ Department for Energy Security and Net Zero (2024). Public Attitudes Tracker

provide electricity, fuel and heat. This has increased slightly from 82% in winter 2023, but remains below the autumn 2022 peak (88%).

- 12.7.33 A study of the tourism effects of renewable development in Wales conducted by the Welsh Government was completed in 2014³⁴. This backs up the evidence from Scottish research which concluded that wind farms and steel lattice towers have a limited impact on tourism. The study stated that the evidence base for tourism impacts of associated infrastructure is far less developed than that for wind farms. The few studies which have addressed the subject have focused on visitors' opinions of towers, which consistently find that reactions are more negative than toward wind turbines. However, there is no evidence that the existing National Grid infrastructure, which is concentrated in North and South Wales, often in popular scenic areas, discourages visitors.
- 12.7.34 MKA Economics worked with VisitInvernessLochNess (VILN) in 2022³⁵ to ascertain the views of local businesses and stakeholders as to the effects of renewable developments around Loch Ness and their effect on tourism. The online survey of local businesses found that only 10% of respondents noted that they were not supportive of renewable development in the Loch Ness area. This is consistent with VisitScotland's own research of consumers³⁶, which stated that 90% of visitors were not dissuaded from visiting or revisiting an area which had sight of a renewable development. The MKA Economics and VILN survey found that 19% felt that visitors may be dissuaded from visiting an area due to the presence of a renewable development. This is above the national VisitScotland research, but only by 10%, suggesting businesses are slightly more nervous than visitors about the impact of renewable developments on local tourist trade. Although this is a different spatial area, it does provide an insight to tourism business views on renewable developments in rural settings.
- 12.7.35 It is acknowledged that this survey was from 2022 and there are likely to be changes in business perception on the back of an increased level of investment and the opportunities for businesses from renewable investments.
- 12.7.36 A recent study by Scottish Renewables assessing the impact of the Beauldy-Denny 400 kV OHL on house prices³⁷ found that grid infrastructure investment did not have a prominent influence on local house prices and that the national macroeconomic factors driving house prices have been the primary determinant of house prices along the power line. This is a finding from a recent piece of research, although not specific to Aberdeenshire it does provide evidence that house prices are not necessarily adversely affected by transmission related investments, and are more affected by wider macroeconomic factors.
- 12.7.37 A review of the location of popular visitor attractions highlights that the Proposed Development is not in close proximity or within sight of the major tourist attractions in Aberdeenshire, and therefore visitors would not be adversely affected by the Proposed Development. The local area has popular tourist settlements of Stonehaven (notably Dunnottar Castle and the Open Air Pool), which have a number of notable visitor attractions, assets and accommodation provision. However, the Proposed Development is located away from the main road and tourist routes. Furthermore, a review of secondary research confirms that tourists are not dissuaded from visiting and revisiting an area where there are renewable developments and associated infrastructure, such as grid infrastructure. In fact, there is a move toward accepting the importance of renewable energy, and an appreciation that renewable energy supports the plans for sustainable tourism.
- 12.7.38 There are a range of recreational uses within Fetteresso Forest such as walkers, mountain bikers and horse riders as well and other tracks in the area, including the Cairn o'Mount viewpoint and hill tracks in the upland area. In terms of landscape effects, **Chapter 6: Landscape and Visual** has determined that there would be some limited effects on landscape character of this area. It also reports that the scale of the moorland landscape in the western part of the study area and forested nature of large parts of the eastern study area

³⁴ Welsh Government (2014). Potential Impacts of Wind Farms and associated Grid Infrastructure on Welsh Tourism

³⁵ MKA Economics (2022). Business Survey of Renewable Developments in Inverness and Loch Ness

³⁶ VisitScotland (2011). Wind Farm Consumer Research

³⁷ Scottish Renewable (2024). House Prices: Impact of Beauldy-Denny Grid Infrastructure

would help to accommodate the Proposed Development within the landscape with little perceptible change to landscape characteristics. In terms of visual effects, the assessment has identified a number of temporary significant visual effects affecting residents within building-based receptor groups, and users of one route receptor (B974), within the study area. These effects are predicted to reduce to not significant in the longer term.

12.7.39 There are some recreational routes in close proximity to the Proposed Development, as noted within the Draft Outdoor Access Management Plan (see **Appendix 13.1**) and there may be a temporary impact for recreational users and tourists along these recreational routes. These are also assessed within the Traffic and Transport Chapter (See **Chapter 13**).

12.7.40 In line within criteria set out in **Table 12.3**, research and review suggest that there would be **Negligible** and not significant effects on tourism and recreational users as a result of the construction and operation of the Proposed Development.

12.8 Cumulative Effects

12.8.1 This part of the Chapter provides an assessment of the potential cumulative effects with other consented and proposed developments (this includes schemes not yet in the planning system) during construction and operation, in accordance with the effects criteria outlined in **Table 12.3**.

12.8.2 The following developments have been considered:

- Glendye Wind Farm (consented);
- Fetteresso Wind Farm (consented);
- Craig Neil Wind Farm (consented);
- 'Hydroglen' Green Hydrogen Production Facility (consented);
- Hurlie 400 kV substation (proposed);
- Tealing to Kintore 400 kV Overhead Line (proposed);
- The Waters (Glenbervie) Battery Energy Storage Scheme (pre-application);
- Quithel BESS (pre-application);
- Bowdun Offshore Wind Farm Onshore Cable Connection and Substation (pre-application);
- SSEN Transmission Offshore Grid Project (including Hurlie potential area for offshore connections) (pre-application);
- Network Rail Drumlithie (pre-application);
- Fiddes 132 Kv Project (pre-application);
- Fetteresso 132 kV Substation Extension (pre-application); and
- Fetteresso Wind Farm Grid Connection / Access Corridor (pre-application).

12.8.3 The underground cable sections of the connection are covered under permitted development and assessed separately (see **Appendix 1.1**), but the intra-cumulative effects are considered in this assessment.

Socio-economic Cumulative Effects

Construction

12.8.4 Should the above schemes be constructed, the cumulative effect on direct employment and economic benefits would be positive for both Aberdeenshire and wider economies.

- 12.8.5 It is outside the scope of this Chapter to calculate expected direct economic benefits of construction of all schemes within the area, however, if the Proposed Development combined with the consented schemes within the region were constructed then a **Moderate Beneficial** (and therefore significant) cumulative effect is predicted in relation to direct economic and employment benefits.

Operation and Maintenance

- 12.8.6 It is likely that there would be other local employment opportunities as a result of the other consented energy developments. This could include indirect supply chain beneficial effects for local businesses and sub-contracted work relating to the ongoing repair and maintenance of the Proposed Development. However, these are relatively limited in nature and therefore these will remain as **Negligible** effects (and not significant).

Tourism and Recreation Cumulative Effects

Construction

- 12.8.7 It is possible that the construction of the Proposed Development simultaneously with other schemes nearby could lead to a greater decrease in the availability of tourist accommodation within the area surrounding the site, particularly as there are limited accommodation opportunities within the local area. However, it is unlikely that this would cause a significant effect, and businesses would benefit during the 'off peak' season when there would usually be less demand for accommodation, therefore, a **Minor Beneficial** (and not significant) cumulative effect is predicted. It is expected that accommodation providers in and around Stonehaven will also temporarily benefit from the level of overnight accommodation required as the construction progresses.

Operation and Maintenance

- 12.8.8 The Proposed Development is in a remote location where, despite a number of renewable energy and grid infrastructure projects being present or consented, these are not likely to cumulatively impact public access in the local area. These effects are effectively already accounted for when the Proposed Development is considered in isolation, and therefore these will remain as **Negligible** effects (and not significant).

12.9 Mitigation

- 12.9.1 This assessment demonstrates that there are beneficial socio-economic effects across the construction and operational phases of the Proposed Development. For example, the local economy would be supported by the Proposed Development through direct and indirect employment and expenditure opportunities. Similarly, the tourism economy will benefit from the influx of temporary construction workers during the construction period.
- 12.9.2 There are merits in adopting certain measures to improve the economic and tourism impacts of the Proposed Development. In economic development terms, there will be the opportunity for local and regional businesses and workers to benefit from the expected employment opportunities. The Applicant can assist through the exchange of information on the type of opportunities that are likely to arise, through initiatives such as 'Meet the Buyer' and publicising local opportunities.
- 12.9.3 The Applicant has committed to maximise the economic opportunities for the local area and business and communities in the Aberdeenshire Council area, where possible. SSEN Transmission, is committed to using local supply chain where feasible and its principal contractors are also encouraged to do the same. This is consistent with SSE's own Sustainable Procurement Code³⁸ and Powering Net Zero Pact³⁹ which seeks to maximise the social and economic benefits of procurement, we will require all suppliers on large capital projects

38 SSE (2023). Sustainable Procurement Code: Supplier Guidance Version 1.3. Effective date: September 2023, Review date: September 2024

39 SSE (2022). Powering Net Zero Pact

to demonstrate local social and economic benefits, and to work with local suppliers, investing in jobs and local economies.

- 12.9.4 Furthermore, the Applicant launched a new Community Benefit Fund in September 2024. Starting from the 1st September 2024, eligible organisations in the north of Scotland will be able to apply for an initial £2m, which is part of SSEN Transmission's opening £10m Community Benefit Fund. This initial funding aims to kickstart impactful projects or initiatives that will bring meaningful benefits to communities.
- 12.9.5 Where there are short term and temporal effects as a result of the construction of the Proposed Development on tourism receptors, measures are presented in an Outdoor Access Management Plan would be implemented by the appointed Principal Contractor (see **Appendix 12.1: Draft Outdoor Access Management Plan**) which would set out how existing public access would be managed during the construction and operation of the Proposed Development.
- 12.9.6 To manage construction traffic associated with the Proposed Development, a Construction Traffic Management Plan would be prepared by the Principal Contractor, in consultation with SSEN Transmission, Aberdeenshire Council and Transport Scotland. The Construction Traffic Management Plan would describe all mitigation and signage measures that are proposed on the public road network. An Outline Traffic Management Plan is provided within the Transport Assessment in **Appendix 13.1**.

12.10 Residual Effects

Socio-economics Residual Effects

Construction

- 12.10.1 No specific mitigation measures are proposed in relation to socio-economic effects during the construction phase due to no significant adverse effects being assessed. The predicted residual socio-economic effect in relation to construction activities therefore remains the same as reported in **paragraph 12.7.24**, deemed to be temporary **Minor Beneficial** and not significant at the regional level and temporary **Minor beneficial** and not significant at the national level.

Operation

- 12.10.2 No specific mitigation measures are proposed in relation to socio-economic effects during the operational phase of the Proposed Development due to no significant adverse effects being assessed. The predicted residual socio-economic effects in relation to operational activities therefore remain the same as reported in **paragraph 12.7.27**, deemed to be **Negligible** and not significant at both the regional and national level.

Tourism and Recreation Residual Effects

Construction

- 12.10.3 No significant effects are predicted on the tourism or recreation receptors during construction of the Proposed Development. Nevertheless, details to safeguard and manage existing public access during construction have been identified in the form of an Outdoor Access Management Plan. As such, the residual construction effects of the Proposed Development on tourism and recreation receptors remain as reported in **paragraph 12.7.40**, deemed to be **Negligible** and not significant.

Operation

- 12.10.4 No significant effects are predicted on the tourism or recreation receptors during the operation phase of the Proposed Development. As such, the residual operational effects of the Proposed Development on tourism and recreation receptors remain as reported in **paragraph 12.7.40**, deemed to be **Negligible** and not significant.

Cumulative Residual Effects

12.10.5 There are potential beneficial effects in relation to the construction and operation of the Proposed Development, both in employment and GVA terms in the context of local and national economies, in the context of the cumulative sites and as such, no specific mitigation measures are proposed. The predicted residual cumulative effect in relation to socio-economic activities in the regional and national levels, therefore, remain as reported in paragraph 12.8.5 to 12.8.6, which are deemed to be **Moderate Beneficial (significant)** during construction and **Negligible** (not significant) during operation.

12.10.6 The predicted cumulative residual effect in relation to construction and operational activities on tourism and recreational receptors are the same as reported in paragraph 12.8.7, which are deemed to be **Minor** (not significant) during construction and in paragraph 12.8.8, deemed to be **Negligible** (and not significant) during operation.

Wider Effects

12.10.7 In addition to the stated economic opportunities at the construction and operational phases, there is also a variety of wider economic impacts which are excluded from the construction and operational economic impact assessment. The wider economic impacts which should also be noted as having positive effects on the regional and national economies include:

- **Supporting policy objectives:** the Proposed Development can play an important role in supporting regional and national policy objectives. Importantly the Proposed Development can support the ambitions set out in the national and regional economic strategies, as set out in **Section 12.4**, notably a new and significant capital investment, whilst supporting the area's green credentials, supporting local business through supply chain opportunities and thereby creating jobs and offering skills development. Furthermore, it will do so over the lifetime of the Proposed Development, providing a role in supporting the drive for high value sector growth, increasing wages and reducing the migration of young people.
- **Local supply chain opportunities:** although economic multiplier effects have been included in the economic assessment it is worth noting the wide range and scale of potential 'ripple effects' notably around the expenditure of workers who visit the local area and who will benefit the accommodation and food service sector. The wider 'knock-on' impacts can in turn support the supply chain of other activities such as the spending habits of retail operations and accommodation providers.
- **Pre-development effects:** these have not been assessed in this Chapter, but considerable pre-development costs have been borne by the Applicant and have benefitted local and national firms. Pre-development activities include; technical consultancy and technical testing and analysis, legal and accounting activities and project management including management consultancy activities and civil engineering. Additional impacts related to accommodation of technical staff and their local spending habits can also be classified as a pre-development effect.
- **Income effects:** the economic analysis has focused on the GVA impact of generated employment as this is the 'real' impact on the economy. However, it is worth noting that new employment will generate additional wages and salaries, much of which will be spent in the UK.
- **Exchequer impacts:** the analysis has not attempted to estimate the additional exchequer impacts as a result of taxes borne (Corporation Tax, Employer National Insurance and Irrecoverable VAT) and taxes collected (Income Tax, Employee National Insurance and non-domestic business rates). These are additional financial benefits which will support the regional and national economies.
- **Perception benefits:** the employment, economic and financial impacts are enhanced through wider strategic impacts associated with strengthening the perception of the area as a place to live, work, visit and invest.

- **Community funding:** The Applicant launched a new Community Benefit Fund in September 2024⁴⁰. Starting from 1 September 2024, eligible organisations in the north of Scotland will be able to apply for an initial £2m, which is part of SSEN Transmission's opening £10m Community Benefit Fund. This initial funding aims to kickstart impactful projects or initiatives that will bring meaningful benefits to communities.

12.11 Summary and Conclusions

12.11.1 This Chapter considers the predicted effects on socio-economic activity, and tourism and recreation activity during construction and operation of the Proposed Development.

12.11.2 As a significant investment in a key economic sector, the Proposed Development supports both pillars of the national economic strategy and each of the broad priority areas set out in the strategy. It would provide contract and employment opportunities for Scottish and Aberdeenshire based businesses throughout the construction phase.

12.11.3 The Proposed Development is expected to generate 68.0 PYEs at the Aberdeenshire level, and a further 153.4 PYEs across Scotland, over the construction phase of the project. This equates to a GVA injection of £5.5 million at the Aberdeenshire level and £13.4 million in the rest of Scotland. When taking multiplier effects into account, the total employment effects during construction will be 104.1 PYEs (with a GVA effect of £9.6 million) at the regional level and a further 294.5 PYEs nationally (with a further GVA effect of £30.1 million). When adding the Aberdeenshire figures and the rest of Scotland figures, the total direct impact is 221.4 PYE and a GVA impact of £18.9 million. When multipliers are taken into account, the total impacts at the Scottish level are 398.6 PYEs and a GVA effect of £39.7 million.

12.11.4 As noted in **paragraph 12.6.10 to 12.6.13**, a significant proportion of benefits will be contained within the local area due to the existing travel to work containment levels.

12.11.5 The assessment demonstrates that there are beneficial socio-economic effects across the construction and operational phases of the Proposed Development. For example, the local economy would be supported by the Proposed Development through direct and indirect employment and expenditure opportunities. As no specific mitigation measures are proposed in relation to potential socio-economics effects during the construction or operational phase, the predicted residual construction (temporary) effects of the Proposed Development on the economy are deemed to be **Minor Beneficial** (not significant) at the national and regional level. The residual operational effects of the Proposed Development on the economy are deemed to be **Negligible** (not significant) at both the regional level and at the national level.

12.11.1 The main benefits will be associated with the construction phase, as the Proposed Development is not expected to generate any direct full-time employment onsite during its operation. There would however be regular ad hoc maintenance, as required.

12.11.2 The residual construction and operational effects of the Proposed Development on tourism and recreational receptors are deemed to be **Negligible** and not significant.

12.11.3 There are potential beneficial effects in relation to the construction and operation phases of the Proposed Development, both in direct economic and employment benefits, in the context of the cumulative sites. In terms of socio-economic effects, the predicted residual cumulative effect during construction is deemed to be temporary **Moderate Beneficial** (and therefore significant). It is likely that there would be other local operational employment opportunities as a result of the other consented energy developments, however, these are relatively limited in nature and as such a **Negligible** and not significant residual cumulative effect is predicted.

⁴⁰ <https://www.ssen-transmission.co.uk/information-centre/Community-Benefit-Fund/>

- 12.11.4 It is possible that the construction of the Proposed Development simultaneously with other schemes nearby could lead to a greater decrease in the availability of tourist accommodation within the area surrounding the site, particularly as there are limited accommodation opportunities within the local area. However, it is unlikely that this would cause a significant effect, and businesses would benefit during the 'off peak' season when there would usually be less demand for accommodation, therefore, a **Minor Beneficial** and not significant residual cumulative effect during construction is predicted. Cumulative effects in tourism and recreational terms during operation are expected to remain **Negligible** and not significant, as there is no evidence that tourists are dissuaded from visiting an area where there are renewable investments.
- 12.11.5 The Applicant has committed to maximise the economic opportunities for the local area and business and communities in the Aberdeenshire Council area, where possible. SSEN Transmission, as in other developments and as set out in their corporate communications, is committed to using local supply chain where feasible and their principal contractors are also encouraged to do the same.
- 12.11.6 In addition, there would be potential community benefits through the Applicant being a responsible developer, where requests for local goodwill funding would be considered through the SSEN Transmission Community Benefit Fund.