



Scottish & Southern
Electricity Networks

TRANSMISSION

Kintore to Tealing 400 kV Overhead Line **Socio-Economic Assessment**

August 2025



Socio-Economic Assessment of the Kintore to Tealing Overhead Line 400 kV Connection

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





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1. Executive Summary

- 1.1. The proposed 400 kV Kintore to Tealing 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 £218.1 million in Gross Value Added (GVA) and 2,214 years of employment across Scotland during its construction.
- 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 Kintore, in Aberdeenshire, and Tealing in Angus 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 400 kV overhead transmission line (OHL) between Kintore and Tealing (the 'Proposed Development'). This new connection also requires two new 400 kV substations to be constructed near Tealing and in Fetteresso Forest in Aberdeenshire to enable future connections and export routes. In addition, two of the existing 275 kV OHLs from the existing substation at Tealing, and Alyth and Westfield substations require to be upgraded to 400 kV and connected to the new 400 kV substation near Tealing. Additional short 275 kV connections between the new 400 kV and existing Tealing substation are also required.

¹ National Grid ESO (July 2022). Pathway to 2030 HND. Available at: <https://www.neso.energy/document/262676/download>

The Proposed Development could generate £20.2 million GVA and support 201 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 SSEN Transmission's total investment in the Proposed Development during development and construction could generate:
- **£20.2 million GVA and 201 years of employment** across the **Regional Area**²; and
 - **£218.1 million GVA and 2,214 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:
- **£43.1 million GVA and 430 years of employment** across the **Regional Area**; and
 - **£255.3 million GVA and 2,627 years of employment** across **Scotland**.
- 1.9. Additionally, SSEN Transmission's Housing Strategy aims to deliver at least 200 new homes by 2030 across the north of Scotland. This not only supports the workforce involved in infrastructure delivery but also contributes to tackling longer-term housing and depopulation challenges in rural communities.
- 1.10. The potential impact on tourism and recreation was also assessed. Following a comprehensive review, the overall impact was determined not to be significant. This is on the basis that the installation of the Proposed Development is not expected to disrupt local tourism activities or significantly affect visitor numbers, ensuring the local tourism sector can continue to thrive.

² The 'Regional Area' is defined as the combined local authorities of Aberdeenshire, Aberdeen City, Angus, and Dundee City.

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 Kintore to Tealing 400 kV Overhead Line (OHL) connection.
- 2.2. The assessment is intended to supplement the Environmental Impact Assessment Report (EIAR) for the Kintore to Tealing 400 kV OHL connection and should be read alongside it. It draws on and should be read in conjunction with the findings from the following EIAR chapters:
 - Chapter 7 Land Use;
 - Chapter 9 Landscape and Visual Amenity;
 - Chapter 14 Traffic and Transport;
 - Chapter 15 Noise and Vibration; and
 - Chapter 16 Cumulative Effects.

SSEN Transmission

- 2.3. 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.
- 2.4. 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

- 2.5. To accommodate the growing volume of electricity generated from renewable sources, SSEN Transmission has identified the need for additional high-voltage network capacity. This includes the development of the Hurlie (Fetteresso) 400 kV Substation near Fetteresso Forest in Aberdeenshire, which is essential for transmitting large-scale renewable generation from both onshore and offshore sources to areas of demand.
- 2.6. To achieve this, SSEN Transmission proposes a new 400 kV OHL between Kintore and Tealing (the 'Proposed Development'). This connection will also require two new 400 kV substations – one near Tealing and one at the proposed Hurlie substation within Fetteresso Forest. These facilities will enable future connections and export routes.

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- 2.7. In addition, two existing 275 kV OHLs from the Tealing Substation to the Alyth and Westfield substations will require upgrading to 400 kV and connecting to the new substation near Tealing. Additional short 275 kV connections between the new 400 kV substation and the existing Tealing Substation are also proposed.
- 2.8. 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 planning applications.

Report Structure

- 2.9. 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** sets tourism in the area in context and considers the relationship between the Proposed Development and the local tourism economy;
 - **Appendix A** provides the methodology for estimating the economic impact of the Proposed Development;
 - **Appendix B** includes a list of local tourist attractions within 15km of the Proposed Development;
 - **Appendix C** includes a list of recreational trails within 15km of the Proposed Development; and
 - **Appendix D** 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 £218.1 million Gross Value Added (GVA) and support 2,214 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 and Angus while being in close proximity to Aberdeen City and Dundee City, the economic impacts are presented for the following study areas:
- **Regional Area** (defined as the local authority areas of Aberdeenshire, Aberdeen City, Angus, and Dundee City);
 - **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 model³ 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 Statistics⁴ and the UK Annual Business Survey⁵. Sectoral allocation of contract categories was based on a mapping of each contract against a level 2 Standard Industrial Classification (SIC) code⁶.
- 3.8. It was estimated that the development and construction of the Proposed Development could generate £16.0 million direct GVA in the Regional Area, £132.9 million direct GVA in Scotland, and £213.0 million direct GVA across the UK.

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

		Regional Area	Scotland	UK
Development		5.4	39.4	47.9
Overhead Lines	Manufacturing	-	-	53.5
	Construction	5.9	47.5	48.2
	Installation	4.4	44.0	60.1
Underground Cables	Manufacturing	-	-	1.0
	Construction	0.1	1.0	1.0
	Installation	0.1	1.0	1.3
Total Direct GVA		16.0	132.9	213.0

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 159 years of direct employment⁷ in the Regional Area, 1,336 years of direct employment in Scotland, and 2,185 years of direct employment across the UK.

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

		Regional Area	Scotland	UK
Development		60	437	557
Overhead Lines	Manufacturing	-	-	588
	Construction	46	369	378
	Installation	51	511	631
Underground Cables	Manufacturing	-	-	10
	Construction	1	8	8
	Installation	1	11	14
Total Direct Employment		159	1,336	2,185

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 multipliers⁸.
- 3.11. It was estimated the GVA impact associated with the multiplier effects could generate £4.2 million GVA in the Regional Area, £85.3 million GVA in Scotland, and £349.5 million GVA across the UK.

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

	Regional Area	Scotland	UK
Indirect GVA	2.4	47.8	181.6
Induced GVA	1.8	37.5	167.9
Total Multiplier GVA	4.2	85.3	349.5

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

- 3.12. It was estimated the employment impact associated with the multiplier effects could support 41 years of employment in the Regional Area, 878 years of employment in Scotland, and 3,371 years of employment across the UK.

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

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

	Regional Area	Scotland	UK
Indirect Employment	24	503	1,702
Induced Employment	17	375	1,670
Total Multiplier Employment	41	878	3,371

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 £20.2 million GVA and 201 years of employment in the Regional Area, £218.1 million GVA and 2,214 years of employment in Scotland, and £562.6 million GVA and 5,556 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	20.2	218.1	562.6
Total Employment	201	2,214	5,556

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 £34.2 million in direct GVA in the Regional Area, £155.6 million in Scotland, and £267.5 million across the UK.

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

		Regional Area	Scotland	UK
Development		10.3	39.4	47.9
Overhead Lines	Manufacturing	-	22.2	107.0
	Construction	13.1	47.5	48.2
	Installation	10.3	44.0	60.1
Underground Cables	Manufacturing	-	0.5	2.0
	Construction	0.3	1.0	1.0
	Installation	0.2	1.0	1.3
Total Direct GVA		34.2	155.6	267.5

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 340 years of direct employment in Regional Area, 1,599 years of direct employment in Scotland, and 2,782 years of direct employment across the UK.

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

		Regional Area	Scotland	UK
Development		115	437	557
Overhead Lines	Manufacturing	-	259	1,175
	Construction	102	369	378
	Installation	119	511	631
Underground Cables	Manufacturing	-	4	19
	Construction	2	8	8
	Installation	3	11	14
Total Direct Employment		340	1,599	2,782

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 £8.9 million GVA in the Regional Area, £99.7 million GVA in Scotland, and £440.8 million GVA across the UK.

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

	Regional Area	Scotland	UK
Indirect GVA	5.1	55.2	227.9
Induced GVA	3.9	44.6	212.9
Total Multiplier GVA	8.9	99.7	440.8

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 89 years of employment in the Regional Area, 1,029 years of employment in Scotland, and 4,224 years of employment across the UK.

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

	Regional Area	Scotland	UK
Indirect Employment	52	586	2,107
Induced Employment	37	443	2,117
Total Multiplier Employment	89	1,029	4,224

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 £43.1 million GVA and 430 years of employment in the Regional Area, £255.3 million GVA and 2,627 years of employment in Scotland, and £708.3 million GVA and 7,006 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	43.1	255.3	708.3
Total Employment	430	2,627	7,006

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, Aberdeen City, Angus, and Dundee City, 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 Aberdeenshire and Angus while being in close proximity to Aberdeen City and Dundee City, this section considers the socio-economic structure of the following study areas:

- **Regional Area** (defined as the local authority areas of Aberdeenshire, Aberdeen City, Angus, and Dundee City); 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 within Aberdeenshire and Angus. 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 757,280, accounting for 13.8% of Scotland's total population of 5,490,100.
- 4.5. The working-age population (aged 16-64) across the Regional Area accounted for 63.0% of the population, slightly lower than the proportion across Scotland as a whole (63.4%). In the same year, 20.2% of the population across the Regional Area was over the age of 65, slightly below the national average of 20.3%.

Table 4-1: Population Estimates, 2023

	Regional Area	Scotland
Total	757,280	5,490,100
0-15	16.8%	16.3%
16-64	63.0%	63.4%
65+	20.2%	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 increase by 0.4%, an increase of approximately 3,000 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 1.4 percentage points (equivalent to the reduction of approximately 8,900 people), while the share of those aged 65+ is projected to increase by 3.4 percentage points.
- 4.8. Scotland is predicted to follow a similar trend, with the share of the working-age population 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	757,280	760,275	5,490,100	5,770,152
0-15	16.8%	14.8%	16.3%	14.1%
16-64	63.0%	61.6%	63.4%	61.1%
65+	20.2%	23.6%	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 human health and social work activities, accounting for 16.0% of total employment. Employment in this sector was higher in the Regional Area compared to Scotland as a whole (15.6%).
- 4.11. Of those working in the Regional Area, 4.9% were employed in the construction industry, similar to 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, which may support some of the installation works, employs a slightly smaller proportion of the population across the Regional Area (0.4%), compared to Scotland as a whole (0.7%). The share of employment in the professional, scientific and technical activities sector, usually associated with project development activity, is overrepresented across the Regional Area (9.4%), compared to the Scottish average (7.2%).

Table 4-3: Industrial Structure, 2023

	Regional Area	Scotland
Human health and social work activities	16.0%	15.6%
Wholesale and retail trade	12.6%	13.2%
Professional, scientific and technical activities	9.4%	7.2%
Accommodation and food service activities	7.9%	8.6%
Education	7.8%	8.2%
Manufacturing	7.3%	6.7%
Mining and quarrying	5.8%	0.9%
Administrative and support service activities	5.5%	6.8%
Agriculture, forestry and fishing	5.1%	3.4%
Construction	4.9%	5.1%
Public administration and defence	4.5%	6.2%
Transportation and storage	4.1%	4.5%
Information and communication	2.4%	3.1%
Arts, entertainment and recreation	2.3%	2.7%
Other service activities	1.5%	1.7%
Real estate activities	1.1%	1.5%
Financial and insurance activities	0.7%	3.2%
Water supply activities	0.5%	0.8%
Electricity, gas, steam and air conditioning supply	0.4%	0.7%
Total Employment	393,020	2,655,000

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

Economic Activity

- 4.13. Across the Regional Area, the unemployment rate was 3.2%, lower than the Scottish average of 3.3%. Additionally, the region's economic activity rate was 78.3%, higher than the rate across Scotland as a whole, which stood at 77.0%.
- 4.14. Table 4-4 also shows that the median annual gross wage for residents across the Regional Area was £31,203, which is slightly below the national average of £31,891.

Table 4-4: Labour Market Indicators, 2024

	Regional Area	Scotland
Economically Active (%)	78.3%	77.0%
Unemployment Rate (%)	3.2%	3.3%

Median Annual Gross Wage (resident analysis)	£31,203	£31,891
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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

- 4.15. As illustrated in Table 4-5, across the Regional Area, 59.1% of people have achieved a Level 7 qualification within the Scottish Credit and Qualifications Framework (SCQF), equivalent to a higher education certificate. This is higher than the share across Scotland as a whole (54.5%).
- 4.16. The proportion of people who have achieved no qualifications across the Regional Area (5.7%) is lower than across Scotland as a whole (8.0%).

Table 4-5: Qualification Levels, 2024

	Regional Area	Scotland
SCQF7+	59.1%	54.5%
SCQF6+	76.1%	72.5%
SCQF5+	90.3%	87.4%
SCQF1+	91.5%	88.6%
Other Qualifications	2.8%	3.4%
No Qualifications	5.7%	8.0%

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

Scottish Index of Multiple Deprivation

- 4.17. 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.
- 4.18. The Regional Area is made up of 966 small areas. As shown in Figure 4-1, 12% of the small areas are located in the most deprived quintile, and 17% are in the second. Most of the small areas across the Regional Area, are clustered at the least deprived end of the distribution, with 20% in the third quintile, 25% in the fourth, and 26% in the fifth.

Figure 4-1: SIMD Distribution of Study Areas



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

Fuel Poverty

- 4.19. 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 heating⁹. 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.
- 4.20. 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.
- 4.21. The proportion of people living in fuel poverty is 24% in Aberdeenshire, 26% of Aberdeen City, 22% in Angus, and 31% in Dundee City. The rate for the Regional Area is 26%, slightly higher than the Scottish average of 25%.
- 4.22. In Dundee City, 13% of households experience extreme fuel poverty, while the rate in Aberdeenshire is 15%, Aberdeen City is 13%, and Angus is 10%. This results in a combined rate of 13% for the Regional Area, which is one percentage point above the national average of 12%.
- 4.23. 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

⁹ Scottish Government (2021). Home Energy and Fuel Poverty.

Regional Area show that this age group is projected to 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	Aberdeen City	Angus	Dundee City	Regional Area	Scotland
Fuel Poverty	24%	26%	22%	31%	26%	25%
Extreme Fuel Poverty	15%	13%	10%	15%	13%	12%

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

Community Wealth Building

4.24. 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 pillars¹⁰:

- **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.

¹⁰ See Centre for Local Economic Strategies - <https://cles.org.uk/community-wealth-building/how-to-build-community-wealth/>

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- 4.25. Both segregated and combined CMB indicators have been provided in Table 4-7 to provide a more comprehensive overview of Aberdeenshire, Aberdeen City, Angus, and Dundee City.
- 4.26. The number of social enterprises significantly differs across the four regions, with Aberdeenshire reporting 11 per 10,000 of the population and Angus reporting 10 per 10,000, whilst Dundee City reports 9 and Aberdeen City reports only 6 per 10,000. Across the four regions, the number of social enterprises per 10,000 of the population across the Regional Area is 9, slightly below the Scotland-wide rate of 11. It is therefore important to increase the number of locally owned businesses with a social purpose in the region to help retain wealth locally.
- 4.27. Although data is not available for Dundee City, with respect to land ownership, only 0.06%¹¹ is owned by communities across the Regional Area. Whilst this rate is comparable to many other local authorities, this is below the Scottish average.
- 4.28. The gender pay gap across the Regional Area (13.4%) is higher than the Scottish average (8.2%), with Angus and Aberdeenshire performing particularly poorly, with Angus reporting a gap of 15.3% and Aberdeenshire reporting a gap of 14.4%.
- 4.29. 19.9% of employees in Angus earn below the real living wage, a figure notably higher than the 10.0% in Aberdeen City and 12.0% in Dundee City. In aggregation, 17.0% 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 limited opportunities for fair employment in the region, particularly in Angus.
- 4.30. Of those living in Aberdeenshire, 24.4% feel that they have an influence over local decisions, comparable to 17.8% of people across Scotland who feel this way¹². Angus and Aberdeen City report a lower proportion, at 9.4% and 12.7% respectively, with Dundee City reporting 14.6% of people who feel this way.
- 4.31. Whilst this data does not fully cover the CWB pillars, it does suggest that there is an opportunity to develop CWB in conjunction with local anchor institutions across the Regional Area.

¹¹ Community Ownership in Scotland 2022, Scottish Government (2022) - <https://www.gov.scot/publications/community-ownership-in-scotland-2022/documents/>

¹² Wellbeing Economy Monitor: Excel Tool – Updated July 2023 - <https://www.gov.scot/publications/wellbeing-economy-toolkit-supporting-place-based-economic-strategy-policy-development/documents/>

Table 4-7: Community Wealth Building Indicators

	Aberdeenshire	Aberdeen City	Angus	Dundee City	Regional Area	Scotland
Social enterprises per 10,000 of the population (2021)	11	6	10	9	9	11
Community land ownership (2023)	0.09%	0.05%	0.02%	-	0.06% *	2.68% *
Gender pay gap (2024)	14.4%	4.1%	15.3%	11.0%	13.4%	8.2%
Employees earning below the real living wage % (2023)	15.0%	10.0%	19.9%	12.0%	17.0%	11.4%
Influence over local decisions (2022)	24.4%	12.7%	9.4%	14.6%	16.7%	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.

- 4.32. By addressing each of the five CWB pillars through initiatives such as prioritising local procurement and investing in skills development, SSEN Transmission can help to maximise the economic benefits of the Proposed Development and retain long-lasting wealth within local communities.

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 scale¹³. WELLBYs can be compared and contrasted across Scotland and the UK.
- 4.34. Underpinning this approach is the 2021 World Happiness Report, Layard and Oparina¹⁴, 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

¹³ BiGGAR Economics (2023). Toward a Wellbeing Economy: The Distribution of Wellbeing in the UK.

¹⁴ 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).

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 79.3 years, greater than the Scottish average of 78.8 years. Additionally, the Regional Area reports a life satisfaction score of 7.4, which was the equal to the national average. This gives the Regional Area an overall WELLBY score of 590, which is greater than the Scottish average of 586.

Table 4-8: WELLBYs

	Aberdeenshire	Aberdeen City	Angus	Dundee City	Regional Area	Scotland
Life expectancy (years)	81.0	78.9	79.7	76.9	79.3	78.8
Life satisfaction	7.6	7.3	7.4	7.3	7.4	7.4
WELLBYs	615	579	591	560	590	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, 75% 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%. However, the Regional Area could perform better in regard to the proportion of residents living within a 5-minute walk of a green or blue space, reporting 64% compared to the Scottish average of 68%.
- 4.39. Other indicators of wellbeing are less favourable across the Regional Area. In particular, at a combined rate of 7.6 tonnes of CO₂ per capita, greenhouse gas emissions are higher across the Regional Area compared to the Scottish average of 7.1 tonnes of CO₂ per capita. Emissions are particularly high in Aberdeenshire, at 10.7 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, Angus exhibits a particularly strong wellbeing performance on

poverty and community outcomes. Comparatively, Aberdeen City exhibits a strong wellbeing performance on fair work and business, and economy, outcomes, whilst Aberdeenshire performs strongly on health, human rights, and poverty, and Dundee City performs strongly on fair work and business, culture, and environment.

Table 4-9: Wellbeing Indicators

	Aberdeenshire	Aberdeen City	Angus	Dundee City	Regional Area	Scotland
Mental health (WEMWBS, 2018-2022)	49.6	49.5	50.2	48.3	49.4	48.9
Suicides per 100,000 (2019-2023)	13.4	12.3	15.4	21.1	15.6	14.6
Good or very good health (2018-2022)	76%	78%	72%	73%	75%	72%
Feelings of loneliness some or most of the time (2022)	14%	24%	19%	34%	22%	23%
Within a 5-minute walk of a green or blue space (2023)	62%	59%	79%	65%	64%	68%
Children living in low-income families (2024)	9.3%	12.3%	16.8%	18.7%	13.0%	16.3%
Low or no qualifications (2022)	9.6%	7.2%	8.2%	7.3%	8.2	9.9%
Very low physical activity levels (2018-2022)	16%	17%	24%	23%	19%	20%
Greenhouse gas emissions (tonnes of CO2 per capita, 2022)	10.7	5.2	10.3	4.2	7.6	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 a relatively well-qualified workforce and high levels of economic participation, indicating good potential to engage local suppliers and workers – particularly in sectors relevant to the Proposed Development, such as construction and professional services. However, there are also notable challenges, including pockets of deprivation and elevated levels of fuel poverty, especially in Dundee City and Aberdeen City.

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 Britain.

- 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 Strategy¹⁵ 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 Strategy¹⁶, British Energy Security Strategy¹⁷, and the Transmission Acceleration Plan¹⁸. 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 2030¹⁹ outlines a strategic pathway for delivering a decarbonised electricity system by 2030. It sets out 25 specific actions across six key areas aimed at accelerating the transition to a clean energy system. These include improving electricity system operability,

¹⁵ UK Government (2021) Net Zero Strategy: Build Back Greener.

¹⁶ Department for Energy Security and Net Zero (2021) Net Zero Strategy: Build Back Greener.

¹⁷ Department for Energy Security and Net Zero (2022) British Energy Security Strategy.

¹⁸ Department for Energy Security and Net Zero (2023) The Transmission Acceleration Plan.

¹⁹ National Energy System Operator (2024). Clean Power 2030.

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 Framework²⁰ 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

²⁰ Scottish Government (2023), Scotland's National Performance Framework.

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 Government²¹ 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 Transformation²² (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.

²¹ Scottish Government (2024), Programme for Government 2024-25: Serving Scotland.

²² Scottish Government (2022), Scotland's National Strategy for Economic Transformation.

National Planning Framework (NPF) 4

- 4.66. The Fourth National Planning Framework (NPF4)²³ 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 Strategy²⁴, 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.

²³ Scottish Government (2023), National Planning Framework 4.

²⁴ Scottish Government (2024), Green Industrial Strategy.

Tourism Strategy: Scotland's Outlook 2030

- 4.72. A collaborative network of industry experts created Scotland's Outlook 2030²⁵, 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

²⁵ Scottish Tourism Alliance (2020), Scotland Outlook 2030.

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.

Tay Cities Region Economic Strategy 2019-2039

- 4.81. In 2017, Angus Council, Dundee City Council, Perth and Kinross Council, and Fife Council, published the Tay Cities Region Economy Strategy 2019-2039²⁶, setting out a long-term plan for East Central Scotland. The strategy highlights the socio-economic challenges facing the region, and the opportunities associated with the growth of the energy sector.
- 4.82. Recognising that the region faces challenges around high unemployment and low wages, the overarching ambition of the strategy is to increase the number of businesses and create higher-paying jobs across the Tay Cities Region. An important aspect of achieving this ambition is to support investment in key infrastructure, helping to generate long term sustainable jobs in advanced manufacturing and the growing industry of renewable energy. The Proposed Development would contribute to these objectives, by generating economic opportunities for the region and supporting well-paid jobs.

²⁶ Tay Cities (2019), Tay Cities Region Economic Strategy 2019-2039.

Corporate Strategic Context

- 4.83. 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

- 4.84. 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.
- 4.85. 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.
- 4.86. 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

- 4.87. 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.
- 4.88. 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

- 4.89. 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.
- 4.90. 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.

- 4.91. 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.
- 4.92. SSEN Transmission's CWB approach is closely aligned with its support for a Just Transition, as articulated in the SSE Group's 2024 strategy²⁷. 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.
- 4.93. In September 2024, SSEN Transmission launched a £10 million Community Benefit Fund to support community projects that align with the principles of Community Wealth Building. The fund is expected to grow and play a central role in delivering long-term local benefits from SSEN Transmission's infrastructure investments.
- 4.94. The first round of funding supported projects that reflect a broad range of community priorities, including skills development and training, the preservation of valued community spaces, cultural heritage initiatives, and efforts to alleviate fuel poverty. Funding is available to communities across the north of Scotland.
- 4.95. 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.
- 4.96. 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

- 4.97. SSEN Transmission's Housing Strategy 2024²⁸ 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

²⁷ SSE (2024) Embedding a Just Transition - <https://www.sse.com/media/4qfjjgvu/just-transition-strategy-update.pdf>

²⁸ SSEN Transmission (2024) Housing Strategy 2024 - <https://www.ssen-transmission.co.uk/globalassets/documents/housing-strategy/ssent-housing-strategy-2024->

aims to avoid exacerbating the region's existing housing crisis while ensuring smooth project delivery.

4.98. 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.

4.99. 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:

- 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.

4.100. 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 on Balfour Beatty's best practices.

4.101. 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 RACI²⁹

²⁹ RACI Chart (also known as a responsibility assignment matrix) is a project management tool used to clarify roles and responsibilities within a team.

chart – which sets out who is Responsible, Accountable, Consulted, and Informed – to clarify roles during the planning and consenting process.

- 4.102. 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.
- 4.103. 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.
- 4.104. 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.
- 4.105. Delivery is managed by a cross-functional steering committee, with local Area Working Groups ensuring effective collaboration across stakeholders, including 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

- 4.106. 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.
- 4.107. 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.
- 4.108. SSEN Transmission has adopted a Community Wealth Building (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 assesses the potential effects of the Proposed Development on tourism and recreation.

Local Tourism Context

Sustainable Tourism GVA and Employment

- 5.2. In its 2015 economic strategy³⁰, 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 across Aberdeen City, Aberdeenshire, Angus, Dundee City, and Perth and Kinross, all of which are within 15km of the Proposed Development, was estimated to generate £765.3 million GVA, accounting for 15.9% of Scotland's total tourism sector value (£4.8 billion GVA) (Table 5-1).

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

	Aberdeen City, Aberdeenshire, Angus, Dundee City, and Perth and Kinross	Scotland
GVA (£m)	765.3	4,803.3
Employment	37,000	229,000

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

Visitors

- 5.3. While specific data on visitor numbers and spending in the individual local authority areas of Angus, Aberdeen City and Aberdeenshire 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; Dundee and Angus; and Perthshire.
- 5.4. In 2023, Aberdeen, Aberdeenshire and Moray Speyside, Dundee and Angus, and Perthshire attracted 2.1 million domestic overnight visitors, who spent an average of £199 per visit, amounting to a total of £413 million. This accounted for 13% of the total spend in Scotland from domestic overnight visits in 2023. As illustrated in Table 5-2, Aberdeen, Aberdeenshire and Moray Speyside, Dundee and Angus, and Perthshire also drew approximately 466,000 international visitors, contributing £256 million in spending, accounting for 7% of all international visits to Scotland.

³⁰ Scottish Government (2015), Scotland's Economic Strategy.

Table 5-2: Visits and Visitor Spending, 2023

	Aberdeen Aberdeenshire and Moray Speyside, Dundee and Angus, and Perthshire	Scotland
Visitor Numbers (million)		
Domestic Overnight Visitors	2.1	12.4
International Overnight Visitors	0.5	4.0
Spend (£ million)		
Domestic Overnight Visitors	413	3,189
International Overnight Visitors	256	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. * Data for Perthshire and Dundee & Angus.

Regional Attractions

- 5.5. As reported by Visit Scotland (2021), the most visited attractions in Aberdeen, Aberdeenshire and Moray Speyside, Dundee and Angus, and Perthshire are shown in Table 5-3. Of these attractions, four are located within 15km of the Proposed Development.

Table 5-3: Top Attractions in Aberdeen, Aberdeenshire and Moray Speyside, Dundee and Angus, and Perthshire

Attraction	Annual Visitors	Distance to Proposed Development (km)
Duthie Park	1,007,982	13
V&A Dundee	621,123	7
David Welch Winter Gardens	297,367	13
Tay Forest Park	279,349	41
Hermitage	173,288	39
Provost Walk	154,101	51
Crathes Castle	153,217	7
SSE Pitlochry Dam Visitor Centre	151,852	50
Scone Palace	121,698	30
Killiecrankie Visitor Centre	110,458	54

Source: Visit Scotland (2021), Insight Department: Dundee and Angus Factsheet 2019. Visit Scotland (2021), Insight Department: Perth and Kinross Factsheet 2019. Visitor Scotland (2021), Insight Department: Aberdeen City, Aberdeenshire and Moray 2019.

Local Tourism Assets

- 5.6. This section assesses the potential effects of the Proposed Development on tourism and recreation. As tourism is an important contributor to the regional economy, the assessment considers all relevant assets within a 15km study area.
- 5.7. These assets have been categorised into three main groups:
- local tourist attractions;
 - local accommodation providers; and
 - recreational trails and core paths.

Local Tourist Attractions

- 5.8. Through online research on the Visit Scotland portal and Google Maps, approximately 279 visitor attractions within 15km from the Proposed Development were identified. These are set out in Appendix B: Local Tourist Attractions, alongside their approximate distance from the Proposed Development.
- 5.9. Large clusters of the local attractions are located in Dundee City (3-11km from the Proposed Development) and Aberdeen City (5-15km from the Proposed Development), of which there are a large variety of attractions, many of which are indoors. These attractions include theatres, museums and galleries, as well as facilities offering experiences such as climbing and go karting.
- 5.10. A significant number of attractions are also located along the coastline between Dundee City and Aberdeen City, clustered in towns including Arbroath, Montrose, and Stonehaven (3-15km from the Proposed Development). Attractions in these locations include museums, beaches, and a range of aquatic attractions such as boat trips and paddleboarding.
- 5.11. The remaining local attractions are located in rural areas between Dundee City and Aberdeen City (6-15km from the Proposed Development). These attractions include golf clubs, nature sites, castles and other outdoor activities such as fishing.

Local Accommodation Providers

- 5.12. Through online research on VisitScotland and Google Maps, approximately 610 accommodation providers were identified in the area surrounding the Proposed Development.
- 5.13. Self-catering providers, accounting for 46% of all accommodation identified within 15km of the Proposed Development, have a significant presence in Dundee City and Aberdeen City.
- 5.14. Most of the hotels identified within 15km of the Proposed Development are located in populated urban centres along the coast, including Dundee City, Arbroath, Montrose, Stonehaven and Aberdeen City.



- 5.15. B&Bs, similar to hotels, were primarily located along the coast with large concentrations in both Dundee and Aberdeen. Holiday parks were predominately located in rural areas evenly spread out between Dundee and Aberdeen.

Table 5-4: Local Accommodation Providers

Type of Accommodation Provider	Total
Self-Catering	281
B&Bs	112
Hotels	179
Holiday Parks / Hostels	38
Total	610

Source: Visit Scotland (2025), Accommodation Dundee and Angus, and Perth and Kinross. Google Maps.

Recreational Trails and Core Paths

- 5.16. 57 trails were identified on Walkhighlands (2024) within 15km of the Proposed Development. These are shown in Appendix C: Recreational Trails, alongside a brief description and their distance from the Proposed Development.
- 5.17. There were also 2,194 core paths³¹ identified within 15km of the Proposed Development, between Dundee City and Aberdeen City.

Evidence from Other Projects

- 5.18. There have been several studies³² 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.
- 5.19. 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.
- 5.20. Businesses also reported a number of positive impacts from the presence of energy infrastructure which included increased customers numbers and spending, workers

³¹ Scottish Government Spatial Data (2024). Core Paths - Scotland

³² 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.

staying in accommodation during the construction period and overall job creation during the construction period.

- 5.21. 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.
- 5.22. Some of these studies highlighted quotes that were obtained from surveys to businesses on their experience with the overhead power lines:

“The pylons are an eye sore, and we fought against them at the proposal stage but since they are up, they don’t affect us and people have got used to their presence”, holiday/touring Park, Ayrshire

“There has been no noticeable effect on business from the power line. It already exists and makes no difference. It is an eye sore, but people tend to get used to it and visitors don’t notice”, food and drink establishment, Ayrshire

- 5.23. 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.
- 5.24. 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 shows this rarely translates into a tangible impact on visitor activity or business revenue.

Impact on Tourism and Recreation

- 5.25. This section assesses the potential for secondary effects on tourism and recreation assets arising from the Proposed Development. The assessment is based on a review of the findings from the following relevant technical chapters:
- Chapter 7 Land Use;
 - Chapter 9 Landscape and Visual Amenity;
 - Chapter 14 Traffic and Transport;
 - Chapter 15 Noise and Vibration; and
 - Chapter 16 Cumulative Effects.
- 5.26. The assessments for traffic and transport (Chapter 14) and noise and vibration (Chapter 15) both concluded that there would be no significant residual effects. As there are no significant primary effects from these sources, no secondary effects on tourism and recreation are expected.
- 5.27. The land use assessment (Chapter 7), however, did identify a significant effect on recreational fishing on the River South Esk and the River North Esk during the construction and operation phases. In addition, the land use assessment identified significant effects on the following airfields: Gossesslie Airfield; Laurencekirk Airstrip; and Fordoun Airfield.
- 5.28. The landscape and visual amenity assessment (Chapter 9) identified several significant residual effects, which are mostly localised and relate to the visibility of construction activities and new infrastructure.
- 5.29. The landscape and visual amenity assessment (Chapter 9) identified several significant residual effects. These effects are mostly localised and relate to the visibility of construction activities or new infrastructure elements such as towers and overhead lines.
- 5.30. Finally, the cumulative effects chapter (Chapter 16) considers the potential for interactive effects between the different impacts identified in the EIAR.

Methodology for Determining Significance

- 5.31. The potential effect of the Proposed Development on tourism and recreation assets has been assessed using a methodology that considers both the magnitude of change and the sensitivity of each asset to determine the overall significance of effect.
- **Magnitude** describes the scale of the potential change to visitor numbers or the visitor experience that could result from the Proposed Development. It is categorised on a scale from major to negligible.
 - **Sensitivity** reflects how vulnerable a tourism or recreation asset is to change without its key characteristics being altered. For example, a promoted scenic

viewpoint has a high sensitivity to visual change, whereas a local path used for exercise has a low sensitivity. It is also categorised on the same scale.

- 5.32. These two factors are then combined in a significance matrix (as shown in Table 5-5) to determine the overall significance of the effect. For example, a high magnitude impact on a highly sensitive receptor would result in a major effect, which is significant in EIA terms. This provides a consistent and transparent framework for the assessment.

Table 5-5 Significance matrix

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

Source: BIGGAR Economics.

- 5.33. The assessment considers all tourism and recreation assets within the 15km of the Proposed Development, including recreational trails, visitor attractions, and accommodation providers. A full list of the assets assessed is provided in Appendix B and Appendix C.
- 5.34. The methodology focused on how the Proposed Development might affect what visitors see and how they experience the place. A key distinction was made between urban and rural assets. Most attractions in urban centres like Aberdeen and Dundee were not considered sensitive, as they are typically indoors and exist within a built-up environment where the project is unlikely to alter the visitor experience.
- 5.35. In contrast, rural and outdoor attractions were assessed on a case-by-case basis. These assets, where the primary draw for visitors is often the natural landscape and undisturbed views, were treated as potentially sensitive receptors.
- 5.36. The remainder of this section assesses the implications of the findings for these assets. The evidence consistently indicates that any potential disruption to tourism-related activity would be limited and temporary, with no significant long-term effects predicted.

Local Attractions

- 5.37. The assessment of effects on local tourist attractions is based on the findings of other relevant technical chapters. This includes a consideration of the primary effects identified in those chapters and the potential for interactive effects, as detailed in Chapter 16: Cumulative Effects.

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- 5.38. The Proposed Development lies within a broad area that includes a diverse range of tourism and leisure attractions, concentrated primarily in Dundee, Aberdeen and a number of urban and rural settlements along the corridor between them. These include cultural institutions, historical sites and castles, and family-oriented indoor attractions (e.g. climbing centres, go-karting venues, and wildlife parks).
- 5.39. For urban attractions, the primary motivations for visitors are intrinsically tied to the cities themselves – such as their cultural offerings, accessibility, event programming, and hospitality infrastructure. These attractions are located in established cityscapes and will not be affected in terms of visibility, accessibility, or experience by the Proposed Development, which is routed through more rural and peri-urban areas. There is no plausible mechanism by which the Proposed Development would reduce the appeal of these venues or influence decisions to visit the cities in which they are located.
- 5.40. In the surrounding rural areas, key attractions include historic sites, country parks, nature reserves, golf courses, and coastal landscapes. These locations appeal to visitors for their cultural significance, unique activities, or tranquil natural settings. While some views from certain rural attractions may change due to the introduction of infrastructure, such changes are not anticipated to materially alter the fundamental appeal of these locations. For example, visitors to a castle or country park are likely to remain focused on the attraction itself – be it the historical narrative, the architectural features, or the walking trails – rather than the distant backdrop. Any potential visual intrusion is expected to be minor and not detract significantly from visitor experience.
- 5.41. A significant impact on land use was identified in Chapter 7 in relation to recreational fishing on the River South Esk and the River North Esk. The assessment determined that the Proposed Development would have a direct, permanent, and adverse impact on the recreational fishing resources in these specific rivers, occurring during the construction phase and continuing throughout the operational life of the project.
- 5.42. However, while this may affect the visitor experience for anglers on these two rivers, the wider region of Angus and Perthshire offers a wealth of alternative high-quality fishing locations. It is therefore considered that any angling tourists displaced from the Rivers North and South Esk could substitute their activity to other nearby rivers. As a result, it is not anticipated that there would be a discernible reduction in the total number of fishing tourists visiting the region as a whole. Therefore, the resulting effect on the wider tourism economy is assessed as minor, which is not significant.
- 5.43. A significant impact on land use was assessed in relation to Gossesslie Airfield, Laurencekirk Airstrip and Fordoun Airfield. The impact of the Proposed Development on these three recreational airfields would occur during the

construction phase and would continue through operation, impacts would be direct, adverse and permanent.

- 5.44. However, while the effect on the operation of these airfields is acknowledged, the user group for these facilities is a very small and highly specialised recreational cohort (private aviators), not the general visiting public. The impact does not affect the broader tourism and recreation assets in the area that attract the vast majority of visitors. Therefore, it is not anticipated that there would be any discernible impact on the overall number of tourists visiting the region. On this basis, the resulting effect on the wider tourism economy is assessed as minor, which is not significant.
- 5.45. The landscape and visual amenity assessment identified twelve distinct landscape character types (LCT) with significant effects in construction and significance of residual effects following additional mitigation during operation.
- 5.46. For local attractions that were assessed as having low sensitivity, their locations were cross-referenced with the LCTs defined in the landscape and visual amenity assessment, which identifies twelve distinct LCTs. These were considered both for potential significant effects during the construction phase and for the significance of residual effects following additional mitigation during operation.
- 5.47. In the case of **Westhill Golf Club**, no significant landscape or visual effects were identified in either phase. Given its low sensitivity and the absence of significant effects, it is considered that the motivations for visiting, such as recreation, sport, and local social engagement, would not be materially disrupted by the Proposed Development and are considered negligible.
- 5.48. **The Caterthuns** were assessed as having medium sensitivity due to the importance of scenic views as a key reason for visiting. The landscape and visual amenity assessment identifies the location as lying within an area of LCT subject to visual impact. Accordingly, the overall significance of effect on this asset is considered to be moderate impact.
- 5.49. **Edzell Golf Club** was assessed as having low sensitivity, as the motivations for visiting relate to recreational sport and the surrounding natural landscape. However, it is located within an LCT, which was identified as experiencing significant effects during construction and significant residual effects following mitigation. Despite these findings, the low sensitivity of the asset means that the overall effect would likely fall within the minor range on the significance matrix, as core visitor motivations are unlikely to be substantially affected by the Proposed Development, however, there may be visibility of the OHL as identified in the landscape and visual amenity assessment and minor significant impact.
- 5.50. **Brimmond Hill** offers panoramic views cross both Aberdeen City and the wider Aberdeenshire landscape and was assessed to have a medium sensitivity. The

landscape and visual amenity assessment identified the attraction lies within a LCT where significant effects have not been identified. As a result, the overall effect on this asset is considered negligible.

- 5.51. **Kirkhill Forest** is primarily visited for walking, cycling, horse riding, mountain biking, and for enjoying the scenic views from the tower on Tyrebagger Hill. The forest lies west of the airport, just off the A96, with the surrounding area characterised by an urban environment. The landscape and visual amenity assessment identified potential visual impacts from the OHL, with significant effects noted in the LCT during both construction and operation. While the OHL could affect the scenic quality of views however, the main recreational motivations for visiting the forest are likely to remain largely unaffected and significance of impact is considered to be minor.
- 5.52. **Kingennie Golf Club** is primarily visited for the quality of its golf course and food, with some visitors also noting the appeal of the surrounding scenic views. The landscape and visual amenity assessment identified potential visual impacts from the OHL, with potential visual effects noted in the LCT. While the OHL could alter aspects of the landscape setting, the main motivations to visit – focused on the golfing experience and hospitality – are likely to remain largely unaffected and so the significance of impact is considered to be minor.

Top attractions along the OHL for visitor attendance are listed below:

- Duthie Park
 - David Welch Winter Gardens
 - Bennachie Forest
 - Crathes Castle
 - Dunnottar Castle
 - Pets Corner
 - V&A Dundee
 - Forfar Loch Country Park
 - The McManus
 - Crombie Country Park
 - Broughty Castle Museum
 - Glamis Castle
 - Camperdown Wildlife Centre
 - Discovery Point
 - University of Dundee Botanic Garden
 - Verdant Works
- 5.53. The top visitor attractions along the OHL corridor have been assessed and are considered to have negligible sensitivity to the Proposed Development. These sites fall broadly into three categories: urban attractions, indoor heritage and cultural sites, and outdoor parks and countryside locations.

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- 5.54. Urban attractions such as the V&A Dundee, The McManus, Verdant Works, Discovery Point and Broughty Castle Museum are located within built-up environments where views are already influenced by urban infrastructure. Their visitor appeal is largely independent of the surrounding landscape, and as such, their sensitivity to changes in the wider setting is minimal.
 - 5.55. Indoor heritage and cultural sites, including Glamis Castle, Crathes Castle and David Welch Winter Gardens, focus primarily on internal features, exhibitions, or immediate landscaped grounds. These controlled environments limit visitor reliance on expansive external views, further reducing any potential sensitivity to visual changes from the Proposed Development of the OHL.
 - 5.56. Outdoor and natural attractions such as Duthie Park, Bennachie Forest, Forfar Loch Country Park, Crombie Country Park, Camperdown Wildlife Centre, and the University of Dundee Botanic Garden are either located in semi-urban settings or feature enclosed, locally-focused landscapes. Visitor motivations here are generally recreational or educational, with limited emphasis on long-range views or visual quality of the wider landscape.
 - 5.57. In summary, due to their location, nature of visitor experience and existing visual context, none of the identified popular attractions in the area are significantly affected by the Proposed Development. The overall sensitivity of these tourism assets is therefore considered negligible. The vast majority don't have a significant effect and so there is not a considerable effect on tourist attractions from the Proposed Development.
 - 5.58. Furthermore, the temporary nature of construction-related activity, combined with established mitigation measures to manage noise, access, and visibility, ensures that any disruption will be minimised.

Local Accommodation Providers

- 5.59. A wide range of accommodation providers exist within a 15km radius of the Proposed Development, from internationally branded hotels in city centres to rural B&Bs, self-catering lodges, holiday parks, and hostels. These providers cater to a variety of visitor profiles, including business travellers, leisure tourists, event attendees, and outdoor enthusiasts. A total of 615 accommodation properties were identified. The sensitivity of each was considered, in line with the definition applied earlier, where sensitivity relates to the asset's ability to adapt to change and the degree to which its key characteristics and qualities are likely to be affected.
- 5.60. In urban areas such as Dundee and Aberdeen, visitor accommodation is chosen primarily due to proximity to city-based attractions, transport links, dining, and other amenities. These accommodations are generally located well away from the Proposed Development and will not experience construction disruption or any visual changes in their immediate surroundings and so, sensitivity was assessed as

negligible. Consequently, there is no reason to believe that the Proposed Development would reduce occupancy levels or deter future bookings.

- 5.61. Similarly, coastal accommodation was considered not sensitive, as the main motivation for visitors is access to the beach, coastal attractions and seaside views, with inland views not being a key factor. Urban accommodation not near the beach was also assessed as negligible sensitivity, as existing infrastructure already influences the setting, though these were considered on a case-by-case basis where relevant.
- 5.62. The key focus of the sensitivity analysis was rural accommodation away from the coast, where views may form part of the motivation for visiting. Each of the 195 such rural accommodations were assessed individually to understand whether the OHL could affect views important to the visitor experience. The majority of these properties were assessed as having low sensitivity where views contributed to, but were not the sole driver of, visitor choice. Only around five properties were judged as medium sensitivity, where views were considered an important part of the motivation to stay. No accommodation was assessed as highly sensitive.
- 5.63. In rural areas, accommodation providers are typically used by visitors seeking peace, access to the countryside, or proximity to specific outdoor or cultural experiences. While these visitors may place higher value on scenic quality, the landscape and visual assessment concluded that any changes to views are likely to be localised and manageable in scale. Most rural accommodation providers are situated near major roads, within established settings, and are designed to accommodate existing landscape features that include built and natural infrastructure. Moreover, rural guests often engage in active recreation such as hillwalking, wildlife watching, and sightseeing – activities that are not dependent on uninterrupted views from accommodation sites.
- 5.64. This sensitivity analysis was supported by the findings of the landscape and visual amenity assessment, including where LCTs had been identified as experiencing significant visual effects. For those accommodation providers assessed as sensitive and where significant effects were noted in the landscape and visual amenity assessment, the magnitude of change, defined earlier as relating to the scale of change in visitor numbers or experience, was considered to judge where visual impacts could be considerable.
- 5.65. Only accommodation located within LCTs where the landscape and visual amenity assessment identified significant visual effects was considered further in terms of potential magnitude of change. Accommodation outside these LCTs, even if assessed as sensitive, was considered to experience negligible impact, as no significant visual effects were identified that could influence visitor behaviour.

- 5.66. Of those, 27 accommodations along the OHL corridor were further assessed, considering factors such as setting, visitor motivation and reliance on landscape views. For those accommodations identified as having low or medium sensitivity, the magnitude of change was then determined with reference to the findings of the landscape and visual amenity assessment chapter. This informed the final assessment of overall significance of effect.
- 5.67. Following this process, five accommodations were identified as experiencing a moderate significance of effect. These are:
- Greenhillock Glamping;
 - Ravensby Hall;
 - The Cosy Cow Shed
 - Glen Dye Cabins and Cottages
 - Skene House Cottage and Courtyard Cottage – Drum Castle
- 5.68. These sites are generally located in more sensitive or visually exposed rural landscapes, where visitor experience is closely linked to tranquil settings, natural views, or heritage value. As such, they are more susceptible to changes introduced by the Proposed Development
- 5.69. The remaining 22 accommodations were assessed as having minor or not significant effects, due to their urban or enclosed settings, or because the primary reasons for visits are unrelated to long-range landscape views.
- 5.70. It is also notable that, in some cases, rural accommodation can benefit from infrastructure projects through increased contractor or project-related demand for temporary lodging. While this is not considered a tourism benefit per se, it reinforces the likelihood that accommodation businesses will not be negatively affected by the Proposed Development.

Recreational Trails and Core Paths

- 5.71. Several recreation trails within 15km of the Proposed Development were identified, many of which were designed for hill walking and hiking, whilst others followed the coastline.
- 5.72. The Proposed Development is not expected to affect visitors' motivation to use the recreational trails, as many are drawn by activities such as hill walking, hiking, and following the coastline. The Proposed Development is not expected to deter visitors from using such trails, and therefore impact has been assessed as negligible.
- 5.73. There are also several core paths in the area. These core paths tend to be used by local residents or are part of the recreational trails described above. As a result, the Proposed Development is unlikely to have an impact on activity along them.

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- 5.74. The assessment of tourism impacts on recreational trails and core paths was carried out in consideration of the assessment of impacts as outlined in the abovementioned chapters.
 - 5.75. Within 15km of the Proposed Development, several long-distance recreational routes, local walking trails, and designated core paths are located, including both inland and coastal routes. These are used for a mix of leisure, commuting, and fitness purposes, and appeal to residents and visitors alike.
 - 5.76. Popular long-distance trails and coastal paths in the area are typically valued for their route design, physical challenge, and access to natural scenery and fresh air. Visitor motivation to use such paths is rarely contingent on uninterrupted views, and walkers are generally accepting of the coexistence of infrastructure within wider rural landscapes – particularly when such infrastructure is set back or aligned along natural topography.
 - 5.77. The visual amenity assessment found that the Proposed Development would result in some localised changes to views from certain recreational routes. Three trails identified in the landscape and visual amenity assessment, Crombie Country Park, Balmashanner Hill, and Cairn-mon-earn, were noted as having potential impacts due to visibility of the OHL.
 - 5.78. The landscape and visual amenity assessment identified visual receptor areas (VRAs) where recreational trails pass through and where views of the Proposed Development would be possible. At **Crombie Country Park**, construction activity from the project would be visible at different points along the route (successive views) and from different locations in turn as visitors move through the area (sequential views), leading to significant effects on views during construction. The 4.25km walk encircles the Crombie Loch reservoir and passes through wildlife hides long the way, the motivations to visit will be unaffected due to the features of the walk.
 - 5.79. At **Balmashanner Hill**, Forfar, the 4km recreational trail offers elevated views over the town, with the viewpoint located about 4.5 km from the Proposed Development. The LCT assessment in the landscape and visual amenity assessment indicated that the OHL may be visible from parts of the trail where these distant elevated views are enjoyed. However, as this is a local trail where visitors are drawn to the memorial and the general recreational opportunity, the presence of the OHL is unlikely to cause a considerable change to the motivations for visiting.
 - 5.80. The short 7.2 km ascent to the summit of **Cairn-mon-earn** above Durris Forest follows forestry tracks and leads to a well-known viewpoint over Deeside. The landscape and visual amenity assessment identified that during operation, significant cumulative effects on views could arise here, as multiple infrastructure projects would be visible along the route and from the summit, affecting both

combined and sequential views for visitors. This may potentially have a slight impact in reducing the appeal of the viewpoint for some visitors, though the route itself and the recreational value of the ascent would continue to attract use.

- 5.81. However, for all routes identified in the landscape and visual amenity assessment, these effects are largely limited in scope and intensity. Path users are in motion and often experience views in a dynamic way, reducing the perceptual impact of visual change. Furthermore, the visual context of these trails already includes a mix of landscape elements – woodland, agriculture, settlements, and existing electricity infrastructure – against which the new infrastructure would be seen.
- 5.82. Importantly, the Proposed Development in the vast majority of case will not sever or restrict access to existing paths or trails or introduce physical barriers or prolonged noise disruption that would diminish the quality of the recreational experience. Construction activities will be managed to avoid obstructing public access and to ensure the safety and continuity of use along nearby routes.
- 5.83. Core paths are also frequently used by local residents as part of daily routines and informal recreation. These paths often serve as connectors between settlements and countryside and tend to be valued for their utility rather than pristine visual quality. The Proposed Development is not anticipated to have any direct or indirect impact on the use, safety, or enjoyment of core paths.

Summary of Tourism and Recreation Impact

- 5.84. The assessment concludes that the Proposed Development will not have a significant effect on tourism and recreation. This conclusion is based on the following analysis.
- 5.85. Assessments of traffic, transport, and noise concluded that any effects arising from the construction phase would be minor, temporary, and effectively mitigated. As no significant residual effects were identified from these sources, no significant secondary effects on tourism and recreation are predicted.
- 5.86. The primary potential for impacts on tourism and recreation therefore arises from the landscape and visual effects assessed in the landscape and visual amenity assessment. The landscape and visual amenity assessment did identify significant visual effects in relation to a number of specific assets, including:
 - **Local Attractions:** Edzell Golf Club, Kirkhill Forest, and Kingennie Golf Club.
 - **Accommodation Providers:** Greenhillock Glamping, Ravensby Hall, The Cosy Cow Shed, Glen Dye Cabins and Cottages, and Drum Castle cottages.
 - **Recreational Trails:** Crombie Country Park, Balmashanner Hill, and Cairn-mon-earn.

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- 5.87. However, while the visual effects on these specific assets are acknowledged as significant in landscape and visual amenity assessment terms, the resulting effect on tourism and recreation behaviour is not considered to be significant. As detailed in this chapter, the motivations for visitors using these assets are unlikely to be materially influenced by the Proposed Development. It is not anticipated that the changes to the landscape would lead to a substantial change in visitor numbers, the overall recreational experience, or the economic performance of tourism businesses in the study area.

6. Conclusions

- 6.1. The proposed 400 kV overhead transmission line between Kintore and Tealing 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:
 - £20.2 million Gross Value Added (GVA) and 201 years of employment across the Regional Area;
 - £218.1 million GVA and 2,214 years of employment across Scotland; and
 - £562.6 million GVA and 5,556 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:
 - £43.1 million GVA and 430 years of employment across the Regional Area;
 - £255.3 million GVA and 2,627 years of employment across Scotland; and
 - £708.3 million GVA and 7,006 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. The assessment also considered the potential impact on tourism and recreation. Following a comprehensive review, the overall impact was determined not to be significant, as the project is not expected to disrupt local tourism activities or significantly affect visitor numbers.

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 Survey³³, as illustrated in the figure below.

Figure 7-2: Direct GVA Calculation



- 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 Tables³⁴ 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

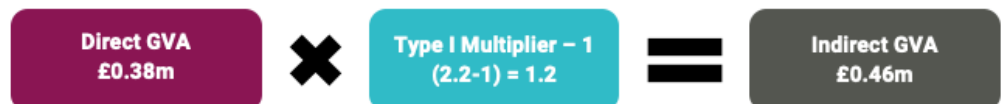
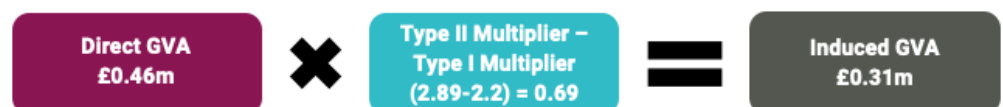


Figure 7-4: Induced GVA Calculation



- 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



³³ UK Government (2024), UK Annual Business Survey 2022.

³⁴ ONS (2024), UK Input-Output Supply and Use Tables 2022.

8. Appendix B: Local Tourist Attractions

- 8.1. Through online research on the Visit Scotland portal and Google Maps, approximately 279 visitor attractions within 15km from the Proposed Development were identified. These are set out in Table 8-1, alongside their distance from the Proposed Development.

Table 8-1: Local Tourist Attractions

Attraction	Distance to Proposed Development (km)
Westhill Golf Club	1
Grains Farm	1
Auqohollie Standing Stone	1
Brechin Castle Centre	1
The Pictish Room	1
Aberlemno Pictish Stones	1
The Forfar Golf Driving Range	1
Brechin Golf Club	1
Brechin Cathedral	1
Caledonian Railway	1
Brechin Town House Museum	1
Laurencekirk Viewpoint	1
Finavon Castle Ruins	1
Balnuith Alpacas Farm	1
Robert Burns Family Memorial Cairn	2
Raspberry Fields Exclusive	2
Castle of Fiddes	2
Glenbervie House	2
Forfar Loch Country Park	2
Forfar Open Garden	2
Strathmore Woolen Co.	2
Forfar Meffan Museum	2
Peterculter Golf Club	2
Melgund Castle	2
Kippie Lodge, Aberdeen Sports & Country Club	2
Inglismaldie Castle	2

Granite Adventures	2
Drum Castle – Garden & Estate	2
The Mains of Drum	2
Cullerlie Stone Circle	3
Arbuthnott House	3
Kintore Golf Club	3
White Swan Gallery	3
Dunnottar Stone Circle	3
Grassic Gibbon Centre	3
Westerton Farmers	3
Murton Farm, Tearoom and Nature Reserve	3
Forfar Golf Club	3
Restenneth Priory	3
Thornton Castle	3
Gin Bothy Experience	4
Glamis Castle	4
Wynford Farm Park	4
Newton Farm Holidays & Tours	4
Auchenblae Golf Course	4
Kirktown Garden Centre	4
Grampian Toy and Dollhouse Museum	4
aMAZEing places	4
Castle Fraser, Garden & Estate	4
Kemnay House	4
Countesswells	4
Camera Obsura	5
Pathhead Farm Dog Park	5
J M Barrie's Birthplace	5
Kirriemuir Gateway to the Glens Museum	5
The Caterthuns	5
Bon Scott Statue	5
Peter Pan Statue	5
Edzell Golf Club	5
Ryze Dundee – Xtreme Air Sports	5
Caird Park Golf Club	5

Brimmond Hill	5
House of Dun & Angus Folk Museum	5
Langley Park Gardens	5
Dunnottar Woods	5
Highlandstar Wellservice Ltd	6
Kirriemuir Golf Club	6
St Cyrus Beach & Nature Reserve & Visitors Centre	6
St Cyrus National Nature Reserve – viewpoint	6
Mor Beers	6
Ballumbie Castle Golf Club	6
Dundee International Sports Centre	6
Kirkhill Forest	6
Downfield Golf Club	6
Craibstone Golf	6
Stonehaven Shellfish & Boat Trips	6
Stonehaven Heated Open Air Swimming Pool	6
Stonehaven Folk Festival	6
Stonehaven Paddleboarding	6
Stonehaven Beach	6
Balgavies Loch	6
Deeside Golf Club	6
Baa!	6
Stonehaven Heritage Treasure Hunt	6
Edzell Castle and Garden	7
Dundee Ice Arena	7
The Fun Factory	7
RSPB Scotland Loch of Kinnordy	7
Fettercairn Royal Arch	7
Thinker's Hill	7
Skyline Trampoline Park	7
Camperdown Wildlife Centre	7
Dundee Museum of Transport	7
Baxter Park	7
Dundee Law	7
Camperdown Country Park	7



Drumtochty Castle	7
Inverurie Golf Club	7
Inverurie Whisky Shop	7
Dobbies Garden Centre Aberdeen	7
Kirkhill	8
Milton Art Gallery	7
TwinPeakes Flyfishing	7
Olympia	7
Crathes Castle	7
Kingennie Golf Club	7
Johnshaven Heritage Hub Museum	7
Sup2Summit	7
V&A Dundee	7
Discovery Point and RRS Discovery	7
Verdan Works Museum	8
Dundee Science Centre	8
Caird Hull	8
Dundee Community Craft	8
Avertical World Climbing & Bouldering Centre	8
D'Arcy Thompson Zoology Museum	8
Discovery Walk Historical Walk	8
Wild Shore Dundee	8
TeamSport Go Karting Dundee	8
The McManus: Dundee's Art Gallery & Museum	8
Gallery Q Dundee	8
The McManus Collection Unit	8
Laser Combat Dundee	8
Mills Observatory	8
HMS Unicorn	8
St Mary's Tower	8
Whitehall Theatre	8
Dundee Contemporary Arts	8
Dawson	8
Ancrum Outdoor Centre	8
Auchterhouse Country Sports	8



Affleck Castle	8
Stonehaven Golf Club & The View Restaurant	8
Tolbooth Museum	8
Dunnottar Castle	8
Eslie the Greater stone circle	8
RSPB Scotland Fowlsheugh	8
Kinneff Old Church	8
Hazlehead Park	8
Garioch Hertiage Centre	8
Ury Riverside Park	8
Easter Aquhorthies Stone Circle	8
Maggie Law Maritime Museum	8
Montrose Air Station Heritage Centre	8
Fasque Castle	8
Crawton Waterfall	8
Stonehaven Clock Tower	8
Hazlehead Pines Golf Course	8
Hazlehead 9 Hole Golf Course	8
The rocks of solitude	9
Monikie Country Park	9
Salmo Fly Fishing Scotland	9
Elsick House	9
Montrose Museum	9
Pitmusies Gardens	9
Montrose Golf Links Ltd	9
Newmachar Golf Club	9
Paul Lawrie Golf Centre	9
Auchmill Golf Club	9
Broughty Castle Museum	10
SaltDog Marine	10
Portlethen Golf Course	10
Barnhill Rock Garden	10
Broughty Ferry Beach	10
Eslie the Lesser stone circle	10
Nine Stanes Stone Circle	10

Piperdam Golf Course	10
Johnston Gardens	10
Midmar Castle	10
Scottish Wildlife Trust	10
Montrose Beach	10
Portlethen Golf Club	10
Banchory Golf Club	10
The Gordon Highlanders Museum	10
The Barn Barra Castle	10
Aberdeenshire Highland Beef	10
Falls of Feugh	10
Banchory Museum	10
Monifieth Golf Club	11
Angus Alchemy	11
TATHA Gallery	11
Crombie Country Park	11
Ashludie Golf Course Starter Hut	11
Grange & Broughty Golf Club	11
Macdui Bike Adventures	11
Hoodles Playbarn	11
Kilts Wi Hae Ltd	11
Pitfichie	11
Bike Bothy Pitfichie	11
LilyK Yarn Shop	11
Time Exposure Travel Ltd	11
The Unit Gym & Fitness	11
Monifieth Golf Links	12
Meigle Museum	12
Scotsraig Golf Club	12
Paddle Active	12
Ledyatt Loch Trout Fishery	12
Inchmarlo Golf Centre	12
Westburn Park	12
Bennachie Visitor Centre	12
Dunninald Castle and Gardens	12

Ferryhill Railway Heritage Trust	12
Urban Wellness Float	12
Parkhill gardens centre	12
Lochter Activity Centre	12
His Majesty's Theatre	12
Bennachie Forest	12
Ledcrieff Loch Trout Fishery	13
Barry Mill	13
Drumoig Golf Course	13
Tentsmuir National Nature Reserve	13
Duthie park	13
Aberdeen Maritime Museum	13
Aberdeen Science Centre	13
Provost Skene's House	13
Whitehill Stone Circle	13
Boddin Point Lime Kilns	13
Kings Links Golf Course	13
Bridge of Don Country Club	13
Oldmeldrum Golf Club	13
University of Aberdeen Zoology Museum	13
Aberdeen Art Gallery	13
Aberdeen Spy Mission Treasure Trail	13
Kadampa Meditation Centre	13
Marischal College	13
Breakout Games Aberdeen	13
Glen Garioch Distillery	13
Fernweh UK	13
Juniper	13
Focus arts and crafts design group	13
Kincorth Hill Local Nature Reserve	13
Aberdeen Performing Arts – Music Hall	13
Aberdeen Diving Services Ltd	13
The Light Chasers Academy	13
David Welch Winter Gardens	13
The House of Botanicals	13

Aberdeen of Academy of Performing Arts	13
Finnies the Jeweller	13
Frantiques	13
Peacock visual arts	13
King's College Chapel	13
Jamieson & Carry	13
Aberdeen Sports Village	13
Wormit Trout Fishery	14
Panmure Golf Club	14
Footdee	14
William Wallace Statue	14
Fast Lane Indoor Raceways	14
Codona's	14
Innoflate Aberdeen	14
Aberden Beach	14
Dolphinwatch	14
Bennachie	14
Donmouth Local Nature Reserve	14
St Andrew Cathedral Church	14
St Machar's Cathedral	14
Aberdeenshire Sheepdogs	14
Slanj	14
Loch of Lintrathen	15
Strathmore Golf Centre	15
Alyth Golf Club	15
Loanhead of Daviot Stone Circle	15
Wheelie Fun	15
Red Castle	15
Lunan Bay	15
Balnagask Golf Course	15
Royal Aberdeen Golf Club	15
North East Kitesports	15
Den Wood	15
Aberdeen Harbour Tours	15
Pitmedden Garden & Museum of Farming Life	15

Greyhope Bay Centre	15
Carnoustie Golf Links	15
The Carnoustie Burnside Course	15
Glenisla Golf Course	15
Murcar Links Golf Club	15
Tolquhon Castle	15
Clachnaben	15

Source: Google Maps (2025). Visit Scotland (2025).

9. Appendix C: Recreational Trails

- 9.1. Several recreation trails within 15km of the Proposed Development were identified. These are set out in Table 9-1, alongside their distance from the Proposed Development.

Table 9-1: Recreational Trails

Trails	Description	Distance to Proposed Development (km)
Forfar Loch Circuit, Forfar	4km straightforward and flat circuit of Forfar Loch.	1
Balmashanner Hill, Forfar	4km short walk through Reid Park to Balmashanner Hill.	2
Sidlaws: Craigowl and Auchterhouse hill	8km hill walk that offers three summits with views towards the city and Tay.	2
Cairn-mon-earn, Durris Forest	7km short ascent on forestry tracks with viewpoint for Deeside.	3
Countesswells forest trails	5km pleasant walk in Countesswells Forest.	3
Dunect Estate and Barmekin Hill	12km circular walk with views of country houses as well as over the Policy Loch.	3
Kirriemuir Explorer	5km walk explores key features of Kirriemuir.	4
Brimmond Hill, near Westhill	4km walk to the summit of Brimmond Hill with views of Aberdeen.	4
Elrick Hill Circuit	4km short walks combines forest trail with natural and open landscapes.	4
Catherthun Forts	3km walk leading to two iron age hill-forts.	5
The Tappie Tower, Kirkhill Forest	7km walk following quiet tracks with a climb up to the top of Tyrebagger Hill.	5
Camperdown, Templeton & Clatto	10km walk through the country park on the edge of Dundee.	5

Dunnottar Woods	4km woodland walk on the fringes of Stonehaven.	5
Rocks of Solitude river circuit	11km woodland path following the river North Esk.	6
St Cyrus beach and cliff	5km walk along the sand of St Cyrus beach with views from the cliffs.	6
Hazlehead Park, Aberdeen	5km path through Hazlehead Park with gardens, mazes, pets, play park and café.	6
Montrose Beach circular	12km circular walk along the length of a sandy beach.	6
Montrose Basin	6km walk that visits the western fringe of the Montrose Basin.	6
Dunnottar Castle, from Stonehaven	5km short coastal circuit with views of Dunnottar Castle.	6
Ley Wray, Crathes Castle	7km woodland walk in the parkland of Crathes Castle.	7
Meikle Tap	7km circuit to the easternmost summit of the Hill of Fare massif.	7
Dundee Law from Discovery point	5km walk that covers the major attractions in Dundee with views from Dundee Law.	7
Inverbervie to Johnshaven	8km easy coastal walk which passes through Gourdon harbour.	7
Duthie Park and the River Dee	12km walk along the banks of the River Dee.	7
River Esk circuit, Cortachy	4km path alongside the River South Esk.	8
Crathes Castle and the River Dee from Banchory	8km walk following the River Dee with possible view of Crathes Castle.	8
Kinpurney Hill and Monument, Newtyle	6km mixed walk alongside an old mill stream.	8
Airlie Monument and Dykehead circuit	6km woodland walk with views of Airlie Monument.	9
Dyce to Udney Station	13km track suited for cycling.	9

Monikie Country Park	3km grassy path walk around two former reservoirs.	9
Angus Coast: Broughty Ferry to Carnoustie	13km flat walk along the coastline.	10
Hill of Fare: southern circuit	18km walk through forest and moorland.	10
Kerloch, from the north	10km walk to the top of Kerloch, the highest hill of the foothills of the Mounth range.	10
Crombie Country Park	4km woodland path goes around a reservoir.	10
Scurdie Ness and Elephant Rock	12km coastal circuit with views of a lighthouse.	10
Mither Tap from the Bennachie Centre	6km path through woods and moorland that reaches the peak of Bennachie.	10
Fife Coastal Path 11: Newport on Tay to Newburgh	29km walk through farm and forest tracks.	11
Millstone Hill, near Bennachie	5km circular walk that ascends Millstone Hill.	11
Lundie Craigs circuit, Sidlaws	8km walk to the summit of Sidlaw Hills.	11
Aberdeen Centre – Granite City	3km city street walk to visit architectural and sculptures in Aberdeen's city centre.	11
The Complete Bennachie, from Rowantree	17km walk through Bennachie visiting most of the hill tops.	11
Cairn William, Pitfichie Forest, near Alford	16km circuit following tracks and mountain biking paths through the forest.	11
Bennachie: Oxen Craig and Mither Tap	9km walk climbs the two highest peaks of Bennachie.	12
Footdee and Aberdeen harbour	5km walk passes the busy modern harbour and returns via the city beach.	12
Old Aberdeen and beach circuit	8km walk on the beach with views of the river and woodland.	12
March Trail, Scolty, near Banchory	4km walk on forestry tracks and paths.	13

Tay Bridge & Balmerino, from Wormit	9km circular walk along the Tay Estuary with views of the Tay rail bridge and Dundee.	13
Hill of Fare: northern approach	7km forest track that goes through rough moorland.	13
Torry Battery and Girdle Ness	4km walk that passes the lighthouse, sea views and Torry Battery.	13
Lunan Bay	12km easy sandy walk with views of a ruined castle.	13
Scolty Hill, near Banchory	3km short walk to the summit of Scolty Hill with views of the countryside.	14
Cat Law and Corwharn, Glen Isla	19km walk that goes over mostly open moorland.	14
Balmerino and Thornton circuit	5km walk that goes through woodlands overlooking the Firth of Tay.	14
Carnoustie Links	7km walk visits famous golf course and wildlife pond.	15
Tentsmuir Forest & dunes	6km woodland path explores the dunes of Tentsmuir Point nature reserve.	15
Clachnaben, Glen Dye	9km hill path going up Clachnaben.	15
Mount Battock via Clachnaben	25km walk up Mount Battock from the east side of the Corbetts	15

Source: Walkhighlands (2025).

10. Appendix D: Socio-Economic Assessment Addendum



Socio-Economic Assessment Addendum June 2025

Energy Consents Unit Reference Number: ECU00005225
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 and keep installed an approximately 106 kilometre (km) 400 kV OHL, supported by steel lattice towers between a proposed new substation at Emmock, near to Tealing in Angus and an existing substation at Kintore via a second proposed new substation to be named Hurlie, which is to be located within Fetteresso Forest west of Stonehaven.



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: Kintore to Tealing 400 kV Overhead Line

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 Aberdeenshire Council and Angus Council.

These documents are:

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

There appears to be no specific socio-economic documents published by Angus Council, but the following documents have some relevance and are therefore considered:

- Angus Council's Plan 2023-28 (Update 2024) (May 2024); and
- Angus Council Delivery Plan (2025/26) (Draft) (February 2025).

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

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 Rural 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.

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 sets 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	Our CWB Strategy seeks to retain and reinvest wealth in local communities, strengthening community ties, and promoting sustainable

collaborative skills pathways	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	Our Community Benefit Fund is designed to bring substantial benefits and a positive, lasting legacy

vibrant, safe and resilient communities.	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 <u>Sustainable Workforce Strategy</u> 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.
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Angus Council's Plan 2023-28 (Update 2024) (May 2024)

This document was originally approved in March 2023 and sets out the Council's vision and priorities for the period up to 2028. Several significant developments as have resulted in the need to update the existing plan. This document contains some discussion on CWB.

The 'Caring for the Economy' priority notes that the Council will: *be more commercial in our approach to contracts and support growth of business locally whenever possible through a community wealth building approach.* It also notes that as an 'Indicator of Progress' that the Council will: *Be more commercial in our approach to contracts and support growth of business locally whenever possible through a community wealth building approach.* The documents does not appear to set any specific objectives or targets for developers who submit consent applications or matters for them to consider in their application submission.

However, it is considered that this addendum has explained at length the commitment of SSEN Transmission to CWB and it is not relevant to repeat them again.

Thus, it is considered that SSEN Transmission's commitments is in accordance with the objectives of Angus Council's Plan.

Angus Council Delivery Plan 2025/2026 (Draft) (February 2025)

This document focusses on the Council's key delivery priorities for 2025/26. This document contains some references to CWB. Similar to the aforementioned, Angus Council Plan 2023-28, it reiterates the same CWB points.

There appears to be specific objectives or measures for developers or applicants to take into account.

However, to reiterate, it is considered that this Addendum provides a robust explanation of the CWB initiatives from SSEN Transmission.

Conclusion

This Addendum has addressed a number of relevant documents published by Aberdeenshire Council and Angus Council in relation to CWB and objectives related to energy development. Sufficient information has been provided to show how the business is working in these local authority areas 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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