

Strathy South Wind Farm Grid Connection

Socio-economic and Tourism Technical Note

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Scottish & Southern
Electricity Networks

TRANSMISSION

STRATHY SOUTH WIND FARM GRID CONNECTION

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SOCIO-ECONOMICS AND TOURISM TECHNICAL NOTE

1.1 Introduction

- 1.1.1 Scottish Hydro Electric Transmission plc ("the Applicant"), operating and known as Scottish and Southern Electricity Networks Transmission (SSEN Transmission), is applying for consent under section 37 of the Electricity Act 1989 to construct and operate a new double circuit 132 kV overhead line (OHL), hereinafter referred to as the Proposed Development, to initially connect the consented Strathy South Wind Farm to the electricity transmission network at Connagill 275/132 kV substation. To allow for futureproofing, it is proposed that a section of the new double circuit OHL would be capable of operating at 275 kV in the future, if required.
- 1.1.2 The Applicant is also seeking deemed planning permission under section 57(2) of the Town and Country Planning (Scotland) Act 1997 for certain elements of the project, or ancillary development required to facilitate its construction and operation. These ancillary works would include the installation of a cable sealing end (CSE) compound, underground cables (UGC), temporary and permanent access tracks, tree and vegetation clearance, temporary working measures / areas, and dismantling and removal of redundant parts of the existing Strathy North 132 kV OHL infrastructure that the project would replace.
- 1.1.3 The electricity transmission project is referred to as the "Strathy South Wind Farm Grid Connection" (and hereafter also referred to interchangeably as "the Proposed Development").
- 1.1.4 The Proposed Development comprises a Proposed Alignment and an Alternative Alignment. The Proposed Alignment would consist of approximately 10.5 km of 132 kV double circuit OHL supported by steel lattice towers from Strathy North 'T' (near Dallangwell) to a new CSE compound, prior to connecting into Connagill 275/132 kV substation via two short sections of single circuit 132 kV UGC. The Alternative Alignment would be consistent with the Proposed Alignment between Towers 19 to 31 and from Tower 48 to its connection into Connagill 275/132 kV substation. From Tower 31 though, the Alternative Alignment would deviate away from the Proposed Alignment for approximately 8 km.
- 1.1.5 The Applicant is presenting both alignments as part of the consent application. The decision taken by the Applicant to include both options within the section 37 consent application has been made given the route of the Proposed Alignment passes through the footprint of the proposed Melvich Wind Energy Hub. The minimum distance required between the proposed wind turbines and an OHL capable of operating at 275 kV could not be maintained along the route of the Proposed Alignment and therefore, should Melvich Wind Energy Hub be granted consent, an alternative OHL alignment (i.e., the Alternative Alignment) would need to be considered.
- 1.1.6 This Technical Note sets out the economic impact of the Proposed Development at the construction (including dismantling of the existing OHL) and operational phases, and sets out other wider community and tourism impacts.
- 1.1.7 Construction of the Proposed Development is expected to commence in March 2026 for around 15 months (plus 6 months to dismantle the existing Strathy North 132 kV OHL).
- 1.1.8 MKA Economics¹ has been commissioned by ASH design+assessment Ltd on behalf of the Applicant, to present an overview of the socio-economic and tourism impacts of the Proposed Development. MKA Economics, who specialise in appraising the economic viability, socio-economic value, and, advising on the delivery of, economic development projects.
- 1.1.9 The Applicant is already a major employer throughout the UK, including Scotland, providing direct employment through the development and construction of infrastructure projects. SSEN Transmission is on a rapid growth

¹ <http://www.mka-economics.co.uk/>

path across Scotland with a fivefold increase in employee numbers since 2019; from around 400 staff to welcoming its 2,000th team member in 2024. The Applicant now employs around 2,200 people. SSE as a whole employs more than 15,000.

1.2 Policy Position

- 1.2.1 This Technical Note has been completed in line with National Planning Framework 4 (NPF4)², notably Policy 11 (Energy), which states:

'Development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities.'

- 1.2.2 It also supports Policy 25 (Community Wealth Building), which states:

'Development proposals which contribute to local or regional community wealth building strategies and are consistent with local economic priorities will be supported. This could include for example improving community resilience and reducing inequalities; increasing spending within communities; ensuring the use of local supply chains and services; local job creation; supporting community led proposals, including creation of new local firms and enabling community led ownership of buildings and assets.'

- 1.2.3 The assessment has also taken cognisance of the National Strategy for Economic Transformation (NSET)³, which sets out the priorities for Scotland's economy as well as the actions needed to maximise the opportunities of the next decade to achieve our vision of a wellbeing economy. This sets out a range of action areas, including entrepreneurial people and culture, new market opportunities, productive businesses and a skilled workforce. It aims to create a *'fairer and more equal society'*, and it endorses the community wealth building principles as a *'practical approach to local economic development that supports a wellbeing economy.'*

- 1.2.4 The assessment also sets out how the Proposed Development addresses the aims of The Highland Council's (THC's) Community Wealth Building Strategy 2024 - 2027⁴ and their Social Values Charter for Renewables Investment⁵. Although these may not be directly relevant to grid investment, they are important considerations in their links to facilitating the development of onshore wind projects.

- 1.2.5 The Community Wealth Building Strategy sets out a three year vision for taking forward and embedding a THC approach to Community Wealth Building in all aspects of the Council's activities and investments. The vision is to:

'Retain greater wealth and maximise spending within and for the communities of the Highlands.'

- 1.2.6 The more recent Social Values Charter for Renewables Investment sets out the community benefit expectations Highland has for companies wishing to invest in renewables in the Highlands. This Charter is designed to set out what is expected from renewables investment alongside what the public / private / community sector partners will do to enable this contribution. It aims to:

'Embed an approach to community wealth building into Highland. Maximise economic benefits from our natural environment and resources. Engage and involve relevant stakeholders to understand how we can continually improve our impact. Unlock economic opportunities for the area'

² <https://www.gov.scot/publications/national-planning-framework-4/>

³ <https://www.gov.scot/publications/scotlands-national-strategy-economic-transformation/>

⁴ https://www.highland.gov.uk/downloads/file/28728/community_wealth_building_strategy_2024

⁵ https://www.highland.gov.uk/news/article/16125/social_value_charter_set_to_unlock_renewables_investment

- 1.2.7 The central focus of NPF4 and NSET at the national level and the Community Wealth Building Strategy and Social Values Charter at the local level, is community wealth building. All projects seeking planning in local areas should embrace and help facilitate community wealth building. This assessment has been completed to set out how the Proposed Development can help unlock community benefits and embraces community wealth building principles through facilitating their connection to the national grid.

1.3 Overview

- 1.3.1 As the Transmission Owner (TO), SSEN Transmission maintains and invests in the high voltage electricity transmission network in the north of Scotland. The network consists of underground and subsea cables, overhead lines and electricity substations, extending over a quarter of the UK's land mass and crossing some of its most challenging terrain.
- 1.3.2 SSEN Transmission powers communities by providing a safe and reliable supply of electricity. This is achieved by taking the electricity from generators and transporting it at high voltages over long distances through the transmission network for onwards distribution to homes and businesses in villages, towns and cities.
- 1.3.3 As set out in SSEN's latest Annual Report⁶ excellent progress has been made in delivering the RIIO-T2 capital investment programme, building the strategic reinforcements to the transmission system required to support the forecast growth in renewable electricity generation across the region. The latest Annual Report states:

'As of 31 March 2024, the total installed capacity of the north of Scotland network was almost 10.6GW, of which just over 9.3GW is from renewable and other low carbon sources. This includes 0.6GW of pumped storage and batteries. We continue to forecast the total installed generation capacity in the north of Scotland to increase to around 14GW by the end of RIIO-T2, with 13GW of this from renewable sources.'

- 1.3.4 The SSEN Transmission operating area and network in the north of Scotland is illustrated in Figure 1.

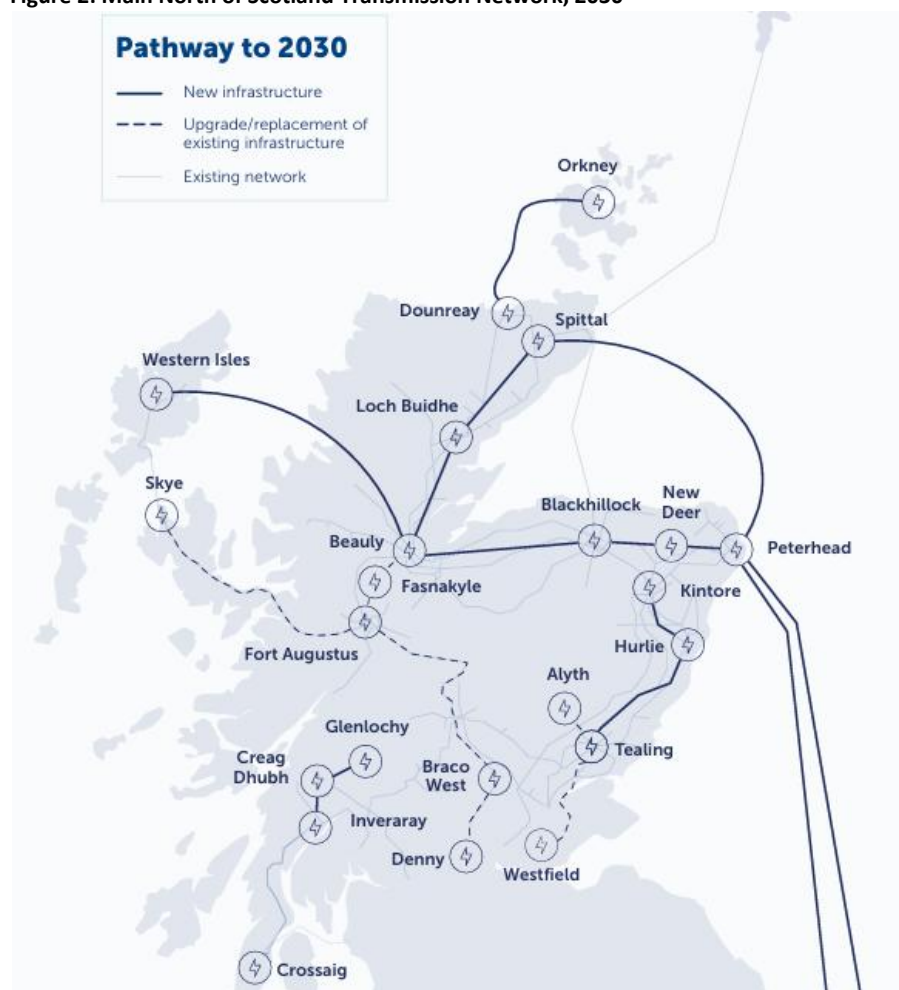
Figure 1: SSEN Transmission Operating Area and Network in North Scotland



⁶ <https://www.ssen-transmission.co.uk/globalassets/information-centre-media/financial-information/annual-performance-reports/annual-report-23-34.pdf>

- 1.3.5 There are around 800,000 end consumers and businesses in the north of Scotland that expect a reliable electricity supply to be able go about their daily lives. Our directly connected generators need availability to the network to be able to transport their power to those end consumers.
- 1.3.6 As SSEN Transmission grows the grid on the Pathway to 2030, we will also invest in the resilience of the network to ensure it is resistant to threats. Our RIIO-T3 Plan⁷ has the following drivers:
- Manage our existing network by replacing or refurbishing equipment at the end of its economic operational life.
 - Strengthen our operational resilience to accommodate network growth and respond to climate change with a focus on training and developing the workforce of the future.
 - Modernise our field operations and maintenance by using new integrated data and digital tools.
- 1.3.7 SSEN Transmission investments are part of the wider 'UK Pathway to 2030' strategy⁸. The 'Pathway to 2030' sets the blueprint for the electricity transmission network infrastructure required to enable the forecast growth in renewable electricity across Great Britain. This includes delivering the UK and Scottish Government's 2030 offshore wind targets of 50GW and 11GW respectively, making tangible progress towards net zero commitments. For the north of Scotland this includes a suite of new investments in the period to 2030 (Figure 2).

Figure 2: Main North of Scotland Transmission Network, 2030



⁷ <https://www.ssen-transmission.co.uk/information-centre/RIIO->

T3/#:~:text=Our%20RIIO%2DT3%20Plan%20has,the%20workforce%20of%20the%20future

⁸ <https://www.ssen-transmission.co.uk/information-centre/pathway-to-2030--delivering-2030-government-targets-and-the-transition-to-net-zero/>

- 1.3.8 SSEN Transmission directly employs over 2,000 people across the north of Scotland and is a significant employer in its own right. Furthermore, the investment plans for the transmission network result in many contracts and further employment benefits.
- 1.3.9 Given the huge amount of investment planned as part of the Pathway to 2030 network improvements, it is expected that community benefits funds associated with new planned infrastructure will be in excess of £100m; this is subject to the final UK Government guidance and approval from the industry regulator Ofgem.

1.4 The Proposed Development Socio-Economic Impacts

- 1.4.1 The development and construction of the Proposed Development will involve substantial capital investment, covering the manufacturing, construction, and installation of the OHL and related infrastructure. A portion of this investment, proposed by SSEN Transmission, will be allocated to regional, Scottish, and UK companies, leading to increased turnover within these regions.
- 1.4.2 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 developed regarding the proportion of contracts that might be secured in each area and the relevant sectors for those contracts. These assumptions were informed by SSEN Transmission's experience with similar projects and MKA Economics' expertise in the sector.
- 1.4.3 Subject to the Applicant being granted the relevant statutory consents, the current estimate is for construction of the Proposed Development to commence in March 2026 and to run for 15 months (plus six months to dismantle the existing 132 kV trident 'H' wood pole OHL). This is a large package of complex civil works, and the tender list would depend on the availability of suitable contractors and sub-contractors.
- 1.4.4 An Input-Output economic model was developed to estimate the economic impact of the Proposed Development. The first step was to consider the direct GVA supported by the Proposed Development. To estimate this, turnover by contract category was divided by a sectoral turnover per GVA ratio, as sourced from the Scottish Annual Business Statistics⁹. Sectoral allocation of contract categories was based on a mapping of each contract against a level 2 Standard Industrial Classification (SIC) code¹⁰.
- 1.4.5 It was estimated that the development and construction of the Proposed Development could generate £13.9 million direct GVA in Highland and £18.4 million direct GVA in Scotland.

Table 1: Direct GVA by Contract Category (£m)

| | Highland | Scotland |
|-------------------------|-------------|-------------|
| Development | 5.2 | 6.1 |
| Construction | 1.4 | 2.0 |
| Installation | 7.3 | 10.3 |
| Total Direct GVA | 13.9 | 18.4 |

- 1.4.6 Similarly, the direct employment generated by each of the contract categories was estimated by dividing the turnover of each contract by the relevant sectoral turnover per job ratio. It was estimated that the development and construction of the Proposed Development could support 171.2 direct years of employment in Highland and 217.0 direct years of employment in Scotland.

⁹ <https://www.gov.scot/publications/scottish-annual-business-statistics-2022/>

¹⁰ <https://www.ons.gov.uk/methodology/classificationsandstandards/ukstandardindustrialclassificationofeconomicactivities>

Table 2: Direct Employment by Contract Category (£m)

| | Highland | Scotland |
|--------------------------------|--------------|--------------|
| Development | 63.9 | 72.0 |
| Construction | 17.2 | 23.2 |
| Installation | 90.1 | 121.8 |
| Total Direct Employment | 171.2 | 217.0 |

1.4.7 To estimate the indirect (supply chain) and induced (staff spending) impacts, it was necessary to multiply the direct GVA and direct employment supported by each contract category by the relevant sectoral GVA and employment Type 2 economic multipliers¹¹.

1.4.8 It was estimated the GVA impact associated with the multiplier effects could generate £10.1 million GVA in Highland and £20.2 million GVA in Scotland.

Table 3: Multiplier GVA by Contract Category (£m)

| | Highland | Scotland |
|-----------------------------|-------------|-------------|
| Development | 3.8 | 6.7 |
| Construction | 1.0 | 2.1 |
| Installation | 5.3 | 11.4 |
| Total Multiplier GVA | 10.1 | 20.2 |

1.4.9 It was estimated the employment impact associated with the multiplier effects could support 90.8 years of employment in Highland and 173.6 years of employment in Scotland.

Table 4: Multiplier Employment by Contract Category (£m)

| | Highland | Scotland |
|------------------------------------|-------------|--------------|
| Development | 33.9 | 57.6 |
| Construction | 9.1 | 18.6 |
| Installation | 47.8 | 97.4 |
| Total Multiplier Employment | 90.8 | 173.6 |

1.4.10 The combined direct, indirect, and induced impacts of the development and construction of the Proposed Development are estimated to generate a total of £24.0 million GVA and 262 years of employment in Highland and £38.6 million GVA and 390.6 years of employment in Scotland.

Table 5: Total GVA (£m) and Employment Impact (Years of Employment)

| | Highland | Scotland |
|-------------------------|----------|----------|
| Total GVA | 24.0 | 38.7 |
| Total Employment | 262.0 | 390.6 |

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

- maximise local presence and start early: begin identifying potential local suppliers as early as possible by engaging and maintaining visibility in the community;
- leverage partnerships: collaborate with local business groups and authorities to enhance opportunities;

¹¹ <https://www.gov.scot/publications/input-output-latest/>

- 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.

1.4.12 Integrating these activities and initiatives early in the development process can help maximise local and regional economic opportunities offered by the Proposed Development.

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

1.4.14 The Proposed Development could also have socio-economic impacts at decommissioning phase. However, it is difficult to predict what local economic conditions would be at the time of decommissioning (up to 40 years in the future) therefore arriving at evidence-based and accurate assumptions is not realistic. Should full decommissioning take place the effects are likely to be short term and similar in nature but substantially lesser than construction effects.

1.4.15 As stated in the EIA Report (**Volume 1: Chapter 3: The Proposed Development**), if the Proposed Development were to be decommissioned all components of the OHL, inclusive of steel from the towers, conductors and fittings, would be removed from site and either recycled or disposed of appropriately. A method statement would be agreed with The Highland Council setting out the detail of the decommissioning process for OHL. Efforts would be made to repurpose the Proposed Development for future connections prior to any decommissioning. Consent to be applied for is therefore in perpetuity.

1.4.16 For these reasons, the potential effects associated with the decommissioning phase are not assessed further in this Technical Note.

1.5 Tourism Effects

1.5.1 The tourism sector is an important employer in the Scottish Highlands as a whole. All of the main tourist attractions as reported by VisitScotland¹² in the Highlands (Urquhart Castle, Glenfinnan Monument, Loch Ness by Jacobite, Glenmore Forest Park and Glencoe Visitor Centre) are more than 100 miles from the Proposed Development. The area immediately surrounding the Proposed Development is relatively distant from other population centres with a small number of visitor attractions. These are either related to the heritage and history of the area (such as the Strathnaver Museum, which focuses on the Highland Clearances), the natural environment (Forsinard Flows) or local farming practices, the environment and local history (Kirkton Farm Buggy Tours). The majority of these local visitor attractions are not expected to be affected by the Proposed Development because it would not change the nature of the attractions.

1.5.2 Due to the proximity of Kirkton Farm, and Kirkton Farm Buggy Tours, there may be a period during the construction phase when access is temporarily affected. However, this would be limited, and the tracks would be upgraded and therefore improved for this business in the longer term. The Applicant has consulted with the land owner and agreed a compensation package during the construction period for disturbed and lost business. This also includes new access tracks will support the business in future.

¹² <https://www.visitscotland.org/research-insights/regions/highlands>

- 1.5.3 The majority of accommodation providers within 15 miles of the Proposed Development are situated on the north coast in the settlements of Bettyhill, Strathy or Melvich. They are advertised based on their coastal views, setting and history, as well as their location on the North Coast 500 tourist route. These features would not be affected by the Proposed Development as it would be located inland to the south, with coastal views being to the north.
- 1.5.4 The North Coast 500 tourist route has driven an increase in visitor numbers in recent years. The North Coast 500 is an important driver of tourism in the local area, increasing its profile. This stretch of the route in proximity to the Proposed Development is known for its coastal views as well as its mountainous scenery and the small, local villages. These factors would not change and so the attractiveness of the route is not expected to be affected by the Proposed Development.
- 1.5.5 A study of the tourism effects of renewable development in Wales¹³ concluded that wind farms and pylons / steel lattice towers have a limited impact on tourism. It did state that the evidence base for tourism impacts of associated infrastructure is far less developed than that for wind farms. The few studies which have addressed the subject have focused on visitors' opinions of pylons / steel lattice towers, which consistently found that reactions are more negative than toward wind turbines. However, there is no evidence that the existing National Grid infrastructure, which is concentrated in North and South Wales, often in popular scenic areas, discourages visitors.
- 1.5.6 The Department for Energy Security and Net Zero's Public Attitudes Tracker¹⁴ reported in July 2024 that 84% of people said they supported the use of renewable energy such as wind power, solar energy and biomass to provide electricity, fuel and heat. This has increased slightly from 82% in winter 2023 but remains below the autumn 2022 peak (88%).
- 1.5.7 Overall, it can be concluded that there are likely to be limited adverse impacts on the tourism economy of Highland, Caithness and Sutherland, and the local area. There are no specific adverse impacts other than temporary restriction on access tracks during construction.
- 1.6 Further Research on Economic Impact of Grid Investments**
- 1.6.1 A more recent survey by Aberdeen and Grampian Chamber of Commerce¹⁵, shows net support by 57% of the Scottish population for new steel lattice towers to distribute clean energy across the country – with only 16% of people, less than one in five, opposed. When asked whether they would be more or less likely to support the rollout of new transmission infrastructure if there was community benefit offered to local residents through compensation, people support such a suggestion by a factor of five-to-one.
- 1.6.2 A further recent study by Scottish Renewables¹⁶ into the impact of Beauldy-Denny Grid Infrastructure on house prices found that that the Beauldy-Denny power line has not had an adverse influence on local house prices. It found that and that the national macroeconomic factors driving house prices have also been the primary determinant of house prices along the power line.
- 1.7 Wider Effects**
- 1.7.1 In addition to the stated economic opportunities at the construction (and dismantling of the existing 132 kV OHL) and operational phases, there is also a variety of wider economic impacts which should also be noted as having positive effects on the regional and national economies, including:

¹³ https://www.gov.wales/sites/default/files/publications/2019-06/potential-economic-impact-of-wind-farms-on-welsh-tourism_0.pdf

¹⁴ <https://www.gov.uk/government/collections/public-attitudes-tracking-survey>

¹⁵ <https://www.energyvoice.com/renewables-energy-transition/558977/ssen-encouraged-by-poll-showing-scotland-accepts-need-for-new-pylons/>

¹⁶ <https://www.scottishrenewables.com/publications/1714-house-prices-impact-of-beauldy-denny-grid-infrastructure>

- Supporting policy objectives: The Proposed Development can play an important role in supporting regional and national policy objectives. Importantly the Proposed Development can support the ambitions set out in the national and regional economic strategies; notably a new and significant capital investment, whilst supporting the area's green credentials, supporting local business through supply chain opportunities and thereby creating jobs and offering skills development. Furthermore, it would do so over the lifetime of the Proposed Development, providing a role in supporting the drive for high value sector growth, increasing wages and reducing the migration of young people.
- Local supply chain opportunities: it is worth noting the wide range and scale of potential 'ripple effects' notably around the expenditure of workers who would visit the local area and benefit the accommodation and food service sector. The wider 'knock-on' impacts could in turn support the supply chain of other activities such as the spending habits of retail operations and accommodation providers.
- Pre-development effects: these have not been presented in this Technical Note but considerable pre-development costs have been borne by the Applicant and have benefitted local and national firms. Pre-development activities include: technical consultancy and technical testing and analysis, legal and accounting activities and project management including management consultancy activities and civil engineering. Additional impacts related to accommodation of technical staff and their local spending habits can also be claimed as a pre-development effect.
- Income effects: the economic analysis has focused on the GVA impact of generated employment as this is the 'real' impact on the economy. However, it is worth noting that new employment would generate additional wages and salaries, much of which would be spent in the UK.
- Exchequer impacts: the analysis has not attempted to estimate the additional exchequer impacts as a result of taxes borne (Corporation Tax, Employer National Insurance and Irrecoverable VAT) and taxes collected (Income Tax, Employee National Insurance and non-domestic business rates). These are additional financial benefits which would support the regional and national economies.
- Perception benefits: the employment, economic and financial impacts are enhanced through wider strategic impacts associated with strengthening the perception of the area as a place to live, work, visit and invest.
- Community benefits: SSEN Transmission launched a new Community Benefit Fund in September 2024. Eligible organisations in the north of Scotland will be able to apply for a share of SSEN Transmission's Community Benefit Fund. This initial funding aims to kickstart impactful projects or initiatives that will bring meaningful benefits to communities.

1.8 Conclusions

- 1.8.1 The UK was the first major economy to pass legislation to commit to a legally binding Net Zero target. The Applicant has also set an ambitious target of reducing the carbon intensity of electricity generated by 60% by 2030.
- 1.8.2 In addition, subject to the relevant statutory consents being granted, the following effects are predicted to flow from the Proposed Development:
- Contribution to Scotland's Net Zero 2045 target, increasing security of supply and bringing savings to consumers by transporting renewable electricity that powers 10 million homes;
 - Generation of substantial economic benefits for the UK, Scotland and the Highlands since the construction of grid investment projects is labour intensive; and
 - Provision of jobs and growth across the country, including high quality, long term employment in rural areas, that are often experiencing declines in their working age populations and lack of employment opportunities.

- 1.8.3 The combined direct, indirect, and induced impacts of the development and construction of the Proposed Development are estimated to generate a total of £24.0 million GVA and 262 years of employment in Highland, with £38.6 million GVA and 390.6 years of employment in Scotland. There will be further local benefits from workers staying and spending locally during the construction programme.
- 1.8.4 The Proposed Development also helps to facilitate the delivery of the predicted economic impacts (jobs and GVA) of Strathy South Wind Farm (and Strathy Wood Wind Farm) given the Proposed Development would be used as 'shared infrastructure' once constructed and commissioned.
- 1.8.5 The main benefits would be associated with the construction and dismantling phase, as the Proposed Development is not expected to generate any direct full-time employment onsite during its operation. There would however be regular ad-hoc maintenance, as required.
- 1.8.6 Overall, it can be concluded that there are likely to be no adverse impacts on the tourism economy of the Highlands, Caithness and Sutherland, or the local area.
- 1.8.7 The Applicant brings an enviable track record in supporting local good cause and community investments through all their investments and operations, and this would be the case at the Proposed Development.