Environmental Impact Assessment Report
Volume 1, Chapter 30: Socio-Economics

MarramWind Offshore Wind Farm

December 2025

MarramWind

Document code:	MAR-GEN-ENV-REP-WSP-000034
Contractor document number:	852346-WEIS-IA-O1-RP-S1-523744
Version:	4
Date:	08/12/2025
Prepared by:	WSP UK Limited
Checked by:	WSP UK Limited
Accepted by:	MarramWind Limited

Contents

1. Socio-Economics

1.1 Introduction

1.1.1.1 This Chapter of the Environmental Impact Assessment Report (EIA Report) presents the results of the assessment of the likely significant effects on baseline social and economic (socio-economic) conditions, tourism and recreation that may arise from the construction, operation and maintenance (O&M) and decommissioning of the MarramWind Offshore Wind Farm (hereafter, referred as 'the Project'). It should be read in conjunction with the project description provided in **Chapter 4: Project Description** and the relevant parts of the following Chapters and Appendices:

- **Chapter 14: Commercial Fisheries:** Commercial fisheries and associated communities may see socio-economic effects such as on employment, ancillary businesses and the wider supply chain. Changes to commercial fishery activities also have the potential to influence wider socio-economics around Peterhead and in Scotland more widely. The information from this Chapter has therefore been used to inform the commercial fisheries assessment, and vice versa.
- **Chapter 15: Shipping and Navigation:** The movements of recreational and commercial vessel are considered in relation to the use of ports by the Project. Changes to port access have the potential to the alter commercial activities at ports, with the potential for wider socio-economic implications. Information from the shipping and navigation assessment has therefore been used to inform the socio-economic assessment.
- **Chapter 17: Seascape, Landscape and Visual:** The connection between landscape amenity and recreational activities is considered. Changes to amenity and recreation have the potential to influence local and regional socio-economic, so information from **Chapter 17** has informed the socio-economic assessment where relevant.
- **Chapter 18: Infrastructure and Other Marine Users:** This Chapter identifies the other industries and wider marine activities which may be affected by the Project and inform the socio-economic assessment.
- **Chapter 19: Ground Conditions and Contamination:** This Chapter provides information on disturbance to soils and temporary use of agricultural land and has been used to inform the socio-economic assessment of related values.
- **Chapter 22: Land Use**: Land use and socio-economics are closely inter-related, for example in terms of agricultural production capability, mineral extraction, and the need to use land for housing or industry, balanced with the need to use nature resources sustainably and to conserve biodiversity and geodiversity. Potential effects relating to 'other land users' including disruption to community access to recreational, tourism and other amenity resources are considered in this Chapter. Information from this Chapter has informed the land use assessment in relation to other land uses.
- **Chapter 26: Traffic and Transport**: This Chapter has been informed by the traffic and transport assessment in relation to possible effects from Project-related traffic on nearby residents and visitors, and transport and access requirements.
- **Chapter 27**: **Landscape and Visual:** Similarly to the explanation provided against **Chapter 17,** visual impacts affecting recreational receptors and visitor attractions in the Onshore Red Line Boundary are considered. The potential for socio-economic impacts from changes to amenity and recreation are considered in this Chapter.

1.1.1.2 Effects on socio-economic receptors that are assessed in other chapters and have negligible effects are not further assessed in this Chapter.

1.1.1.3 This Chapter describes:

- the legislation, planning policy, guidance and other documentation that has informed the assessment (**Section 1.2: Legislative and policy context**);
- the outcome of consultation and engagement that has been undertaken to date, including how matters relating to socio-economics have been addressed (**Section 1.3: Consultation and engagement**);
- the scope of the assessment for socio-economics (**Section 1.3.2: Scope of the assessment)**;
- the data sources and methods used for gathering baseline data including surveys where appropriate (**Section 1.5: Methodology for baseline data gathering**);
- the overall environmental baseline (**Section 1.6: Baseline conditions)**;
- the basis for the EIA Report (**Section 1.7: Basis for the EIA**);
- methodology for the EIA Report (**Section 1.8: Methodology for the EIA Report**);
- the assessment of socio-economics effects (**Section: Assessment of effects: construction stage; Section 1.10: Assessment of effects: Operation and maintenance stage**; **Section 1.11: Assessment of effects: Decommissioning**);
- summary of effects (**Section 1.12: Summary of effects**);
- consideration of transboundary effects (**Section 1.13:Transboundary effects**);
- consideration of inter-related effects and cumulative effects (**Section 1.14: Inter-related effects** and **Section 1.15: Assessment of cumulative effects**);
- a summary of residual effects for socio-economics (**Section 1.16:Summary of residual effects**);
- a reference list is provided (**Section 1.17: References**); and
- a glossary of terms and abbreviations (**Section 1.18: Glossary of terms and abbreviations**).

1.1.1.4 This Chapter is also supported by the following appendices in **Volume 3**:

- **Appendix 30.1: Supporting Socio-Economic Data**.

1.1.2 Socio-economic action plan

1.1.2.1 The **Socio-Economic Action Plan (SEAP)** for the MarramWind Offshore Windfarm is also relevant to this Chapter and should be read in conjunction with it. The **SEAP** sets out the measures to harness the local and regional opportunities and maximise the social and economic performance of the Project.

1.1.2.2 The **SEAP** provides an overview of the key demographic, economic, and social indicators that were used to inform its development. The study areas used in the **SEAP** are aligned with those specified in this Chapter.

1.1.2.3 The **SEAP** also provides a policy review and an assessment of the supply chain capabilities in Scotland, with a particular focus on the regional study area of the Northeast (Aberdeen City, Aberdeenshire, Moray and Highlands). It concludes with a series of recommendations

intended to assist the Applicant in achieving the Project objectives. See **Chapter 3: Site Selection and Consideration of Alternatives** for detail on the Project objectives.

1.2 Legislative and policy context and technical guidance

1.2.1 Legislative and policy context

1.2.1.1 This Section identifies the relevant legislation and policy context that has informed the scope of the socio-economics assessment. Further information on policies relevant to the EIA and their status is set out in **Chapter 2: Legislative and Policy Context**, which provides an overview of the relevant legislative and policy context for the Project. **Chapter 2: Legislative and Policy Context** is supported by **Volume 3, Appendix 2.1: Planning Policy Framework**, which provides a detailed summary of international, national, marine and local planning policies of relevance to the EIA. Individual policies of specific relevance to this assessment and associated appendices have been taken into account.

1.2.1.2 This summary provides a foundation for understanding the specific requirements that this Chapter must address in terms of assessing and mitigating impacts on receptors and relevant environmental issues.

1.2.1.3 The legislation and international agreements relevant to socio-economics include:

- 29th United Nations Climate Change Conference of the Parties (COP29) 2024;
- Developing the North Seas as a green power plant of Europe: North Sea Summit declarations (Department for Energy Security and Net Zero, 2023);
- United Nations Climate Change Conference (COP28) 2023;
- Convention on Biological Diversity Post-2020 Global Biodiversity Framework 2022;
- Nature Conservation (Scotland) Act 2004;
- Land Reform (Scotland) Act 2003; and
- Environmental Protection Act 1990.

1.2.1.4 The policy relevant to socio-economics includes:

- Draft Updated Sectoral Marine Plan for Offshore Wind Energy (Scottish Government, 2025a);
- Aberdeenshire Community Wealth Building Strategy and Charter for Energy Developments (Aberdeenshire Council, 2025a);
- UK Modern Industrial Strategy 2025 (Department for Business and Trade, 2025);
- Programme for Government 2025 to 2026: Building the best future for Scotland (Scottish Government, 2025b);
- Clean Power 2030 Action Plan: A new era of clean electricity (UK Government, 2024);
- Green Industrial Strategy (Scottish Government, 2024);
- National Planning Framework 4 (NPF4) (Scottish Government 2023a);
- Aberdeenshire Council Local Development Plan (Aberdeenshire Council, 2023a);
- Scotland's National Strategy for Economic Transformation – Delivery Plans (Scottish Government 2022);

- Moray Local Development Plan (Moray Council, 2020);
- Offshore Wind Policy Statement (Scottish Government, 2020a);
- Scottish National Marine Plan 2015 (Scottish Government, 2015); and
- The Highland Council, Highland-wide Local Development Plan (The Highland Council, 2012).

1.2.2 Relevant technical guidance

1.2.2.1 Other information and technical guidance relevant to the assessment undertaken for socio-economics include:

- Marine Protected Areas in inshore waters: guidance for undertaking Socio-Economic Impact Assessments (SEIA) (Scottish Government, 2022a).
- Defining 'local areas' for assessing the economic impact of offshore renewables and other marine developments: guidance principles (Scottish Government, 2022b).
- The Green Book (and supplementary guidance) (HM Treasury, 2022).
- Guidance on assessing the socio-economic impacts of offshore wind farms (Glasson, *et al*., 2020).
- Draft Advice on Net Economic Benefit and Planning (Scottish Government, 2016).
- The Ministry of Housing, Communities and Local Government Appraisal Guide (UK Government, 2025b).
- The Additionality Guide – Fourth Edition (Homes and Communities Agency, 2014).
- Methods of Environmental and Social Impact Assessment, Socio-economic impacts 1: economic impacts (Glasson, J., 2009).

1.3 Consultation and engagement

1.3.1 Overview

1.3.1.1 This Section describes the consultation and stakeholder engagement undertaken on the Project relevant to socio-economics. This includes early engagement, the outcome of and response to the Scoping Opinions (Scottish Government, 2023b; Aberdeenshire Council, 2023b) in relation to the socio-economics assessment, non-statutory consultation, and the findings of the Project's Statutory Consultation.

1.3.1.2 An overview of engagement undertaken for the Project as a whole can be found in Section 5.5 of **Chapter 5: Approach to the EIA**.

1.3.2 Key issues

1.3.2.1 A summary of the key issues raised during statutory and non-statutory consultation, specific to socio-economics, is outlined below in **Table 1.1**, together with how these issues have been considered in the production of this EIA Report.

Table 1.1 Stakeholder issues responses – socio-economics

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
Aberdeenshre Council	113	23 March 2023, Aberdeenshire Council's Scoping Opinion (Aberdeenshire Council, 2023b).	*"The contents of this [Scoping Report] chapter are noted. The Council agrees with those impacts to be scoped in to an assessment, with the justifications given to scoping out impacts (paragraphs 7.3.49 to 7.3.51 inclusive) are noted and accepted."*	Acknowledged.
MD-LOT	380	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.1* *The Scottish Ministers advise that a full socio-economic impact assessment is scoped into the EIA Report. This is in line with MAU advice. There is limited information provided within the Scoping Report on the methods that are to be used in the socio-economic impact assessment. The Scottish Ministers advise in line with the MAU advice that primary data is collected to assess social impacts, as a desk-based study alone will not be an adequate way to assess such impacts. The Scottish Ministers highlight the information provided in Annex one of the MAU advice which provides general advice on how to deliver the socio-economic impact assessment and advise that this should be utilised in the EIA Report."*	Stakeholder consultation, including with Aberdeenshire Council, Moray Council, Highland Council, Scottish Enterprise, Highlands & Islands Enterprise, ETZ, Buchan Development Partnership, and Peterhead Community Council, was also undertaken to inform the development of measures outlined within the **Socio-Economic Action Plan** (**SEAP**) for the Project. These measures have been summarised within this EIA. See the **SEAP** for more detail on this consultation exercise. Primary data was collected through questionnaires available to stakeholders during all rounds of Statutory Consultation. Details are presented in the **Pre-**
Marine Analytical Unit	586	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"The MarramWind Offshore Wind Farm scoping report includes descriptions of a range of potential impacts. This response focuses only on the assessment of social and economic impacts. We recommend that a full Socio-Economic Impact Assessment be scoped into the Environmental Impact Assessment. We provide general advice on how to deliver this at Annex 1."*	

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
				Application Consultation (PAC) Report. Since the Scoping Opinion, the Marine Analytical Unit has updated its position to become less prescriptive in respect of socio-economic evidence and assessments for offshore wind projects.
MD-LOT	381	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.2 The Scottish Ministers are broadly content with the impacts scoped into and out of the EIA Report. However, The Scottish Ministers advise that the wider socio-economic impacts, which have been excluded from the study area in paragraph 7.3.8 of the Scoping Report, should be scoped in to the assessment in line with MAU representation."*	This relates to the socio-cultural and distributional effects, which are assessed as Impact 12 within the assessment.
MD-LOT	382	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.3 The Scottish Ministers broadly agree with the proposed approach to scope in Gross Value Added and employment impacts as set out in Table 7.3.10 of the Scoping Report. However, in line with MAU advice, the Scottish Ministers recommend that a detailed description of the methodology used to assess these impacts is provided in the EIA Report, including any key assumptions that underpin estimates."*	The methodology and assumptions used for assessing Gross Value Added (GVA) and employment impacts are provided in this Chapter, including baseline information in **Section 1.6.1** and assessed in **Section 1.9.6**.
MD-LOT	383	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.4 The impacts scoped out in paragraph 7.3.49 of the Scoping Report* (i.e. socio-cultural and distributional effects) *due to a conclusion of no likely significant effect should be reported, to inform the Scottish Ministers of what has been considered and why. In line with MAU advice, the Scottish Ministers recommend*	These impacts are now included in the assessment (see stakeholder issue ID 384 below).

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
			that these impacts are scoped in on the basis that social impacts depend on the views, values, and perceptions of people and the degree of significance cannot robustly be assessed until such people are engaged."	
MD-LOT	384	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.5* *The Scottish Ministers disagree with socio-cultural and distributional effects being scoped out of the EIA Report due to the lack of supporting evidence to suggest that there will be no concentration of impacts within specific groups or communities. Socio-cultural and distributional effects should be scoped in to the socio-economic assessment and the MAU advice in this regard must be addressed in full in the EIA Report."*	Socio-cultural and distributional effects are included as Impact 12 within the assessment.
MD-LOT	385	12 May 2023, MD-LOT Scoping Opinion (Scottish Government, 2023b).	*"5.18.6* *Knock-on socio-economic impacts of other impacts have been recognised in the Scoping Report. The Scottish Ministers advise, in line with MAU advice, that further detail is provided on how these impacts will be assessed."*	Knock-on socio-economic impacts from other impacts such as transport and landscape impacts are included within the assessment in **Section 1.9.8** and **Section 1.9.11**.
Marine Analytical Unit	587	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"At the beginning of the socio-economic chapter, the developer acknowledges the knock on effects that impacts to other receptors may have for the socio-economic receptor. This is a welcome addition but isn't really discussed again elsewhere in the chapter."*	Knock-on socio-economic impacts from other impacts such as transport and landscape impacts are included within the assessment in **Section 1.9.8** and **Section 1.9.12**.
Marine Analytical Unit	588	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation	*"The developers also mention a range of guidance material upon which the assessment is based. This includes work by Glasson, Vanclay and Biggar economics. However, the principles of these guidance documents are not reflected in the rest of the report, nor*	Work by Vanclay and Biggar Economics are not specifically referenced in the Scoping Report. This

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
		Responses & Advice (Scottish Government, 2023b).	*the plans for the EIA, especially with regard to social impacts. For example the assessment will rely on a desk based study, will involve no primary data collection, and there will be little, if any, opportunity for communities and stakeholders to feed in to the assessment using participatory research methods."*	Chapter has been developed using the guidance specified in **Section 1.2.2.** As noted against ID 380, opportunities for communities and stakeholders were provided through stakeholder consultation with Aberdeenshire Council, Moray Council, Highland Council, Scottish Enterprise, Highlands & Islands Enterprise, ETZ, Buchan Development Partnership, and Peterhead Community Council. Further opportunity was provided via the questionnaires made available to stakeholders during all rounds of Statutory Consultation, See **PAC Report** for detail.
Marine Analytical Unit	589	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"Many impacts are scoped in, but these will all be assessed using a desk based study and expert opinion. There is very little detail about the methods that will be used in the assessment, apart from them being desk-based, and so it is not at all clear how the assessment will be done. We would argue that a desk based study is not an adequate way to assess social impacts in particular, and would recommend the collection of primary data (please see Annex 1 for suggestions for delivering socio-economic impact assessment from the Marine Analytical Unit).*	Please see response for Stakeholder issue ID 380 and ID 588 above.

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
Marine Analytical Unit	591	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*Paragraph 7.3.8 states that wider socio-economic impacts covered by the 'Local Area' Marine Scotland, 2022, guidance, are excluded as they do not form part of planning assessment. Under the Marine Scotland Act 2010, Ministers must have regard to "other matters as the Scottish Ministers consider relevant" (Part 4.27.1.b), our advice is that socioeconomic impacts may be significant and should therefore be scoped in to the assessment, with a robust plan in place to understand those potential socio-economic impacts before they are discounted due to being 'wider'."*	The wider socio-economic impacts and their potential significance are included in the assessment.
Marine Analytical Unit	593	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"GVA and Employment* *We broadly agree with the scoping report's proposed approach to scope in GVA and employment impacts. We expect to see a detailed description of the methodology used to assess these impacts in the EIA, including specific details on the methodological approach taken and any key assumptions that underpin any estimates. This may be supplied in a technical annex if necessary. At paragraph 7.3.49 the report states that a number of potential effects have been scoped out from further assessment due to a conclusion of no likely significant effect. We recommend that these effects are reported so that we can understand what has been considered. On the basis that social impacts depend on the views, values and perceptions of people, we recommend that they are scoped in as the degree of significance cannot robustly be assessed until those people are engaged."*	Please see responses for Stakeholder issue IDs 382, 383, 384 above.
Marine Analytical Unit	595	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish	*"The scoping report proposes to scope out socio-cultural and distributional effects. The reasoning given for this is stated in paragraph 7.3.50.: "The concentration of impacts within specific groups or communities is not expected to occur due to the largely offshore location of the Project when constructed and the temporary nature of the onshore works. Socio-cultural and distributional effects are therefore scoped out as reported in Table*	Please see response for Stakeholder issue ID 384 above.

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
		Government, 2023b).	*7.3.10 above."". There appears to be no supporting evidence to suggest that the concentration of impacts within specific groups or communities is not expected to occur due to the largely offshore location of the project. Furthermore, although the location of the project is offshore, significant socio-economic impacts may occur onshore. In the absence of any supporting evidence to suggest otherwise, it seems entirely possible that these impacts may be concentrated within specific groups or communities. We therefore recommend that socio-cultural and distributional effects are scoped into the EIA.""*	
Marine Analytical Unit	597	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"There appears to be no supporting evidence provided to suggest that the concentration of impacts within specific groups or communities is not expected to occur due to the largely offshore location of the project. Furthermore, although the location of the project is offshore, significant socio-economic impacts may occur onshore. In the absence of any supporting evidence to suggest otherwise, it seems entirely possible that these impacts may be concentrated within specific groups or communities."*	The potential concentration of the effects of the Project is included in the assessment within **Section 1.9.8** and **Section 1.9.11**.
Marine Analytical Unit	599	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"Distributional effects may occur on individuals according to their characteristics such as income level, geographical location, gender, age etc. We expect that the assessment will be conducted by someone with the required skills in economics and social research to carry out this type of assessment."*	Please see response for Stakeholder issue ID 384 above.
Marine Analytical Unit	601	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish	*"The socio-economic impact assessment should assess the potential knock-on socioeconomic impacts of other impacts identified in other chapters of the EIA (e.g. commercial fisheries). We welcome that this has been recognised in the scoping report, but feel that there is insufficient detail about whether and how this will be done."*	Please see response for Stakeholder issue ID 587 above.

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
		Government, 2023b).		
Marine Analytical Unit	603	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"We understand that at the point of applying for a licence the developers may not know which ports or landfall locations they will use, nor where they will source their workforce from. Without this information it is difficult to plan primary research and provide a detailed assessment of social impacts, nevertheless we expect transparency on what has the potential to significantly impact but which cannot be assessed fully due to a lack of sufficient detail."*	The assessment considers additional employment and local social characteristics in order to provide transparency in the presentation of the effects at ports and locations potentially used by the Project but agrees with the Stakeholder (MAU) that targeted social research is difficult for the reasons they state.
Marine Analytical Unit	605	12 May 2023, MD-LOT Scoping Opinion Appendix 1: Consultation Responses & Advice (Scottish Government, 2023b).	*"Please review Annex I."*	No response required.
Aberdeenshire Council	899	19 December 2024, Aberdeenshire Council Pre-application Report (Aberdeenshire Council, 2024).	*"Economic Statement/Assessment of Economic Need should be included within any formal submission in accordance with Policy 11c (Energy) and Policy 25 (Community Wealth Building) of NPF 4. Please see Appendix 1 for Aberdeenshire Council's draft charter currently being consulted on - socio-economic impacts and community wealth building proposals to satisfy NPF4 Policy 11c and Policy 25."*	The socio-economic impacts defined in this Chapter include local and community benefits such as employment and associated business and supply chain opportunities, in line with NPF4 Policy 11c and Policy 25. The **SEAP** for the Project includes an

Stakeholder	Stakeholder issue ID	Date, document, forum	Stakeholder comment	How is this addressed in the EIA Report
				assessment of the economic and socio-demographic situation in the north-east of Scotland and sets out measures intended to maximise the net economic benefits of wind farm for the region

1.4 Scope of the assessment

1.4.1 Overview

1.4.1.1 This Section sets out the scope of the EIA for socio-economics. This scope has been developed as the Project's design has evolved and responds to stakeholder feedback received to-date, as set out in **Section 1.3**.

1.4.2 Spatial scope and study area

1.4.2.1 The study area for the socio-economic assessment is identified with reference to published guidance on defining the 'Local Area' (Scottish Government, 2022b). This guidance provides a detailed and specific approach to defining the study area updating. It identifies six main principles:

- impacts should be identified prior to specifying assessment areas;
- areas for supply chain and investment impacts and wider socio-economic impacts are inherently different;
- impacts may radiate from multiple geographic locations ("*epi-centres*");
- pre-existing economic or political geographies should be used, to enhance accountability;
- local areas should be chosen to be understandable to relevant communities; and
- local areas should consist of connected pre-existing economic or political geographies.

1.4.2.2 In addition:

- impacts should be measured at as small a spatial extent area as possible; and
- multiple epi-centres may be required if project decisions are not yet made, or for reasons of commercial confidentiality.

1.4.2.3 The potential effects from the Project were identified at Scoping and provide the basis for the study area used in the assessment below. The area comprises spatial scopes from smaller to larger geographies:

- Local: Scottish electoral wards (council wards) including communities and ports close to the main Project activities;
- Regional: wider areas of one or a group of local authority districts including markets for employment and supply chain activities resulting from the Project; and
- National: Scotland, including recognition of the overarching UK policy context.

1.4.2.4 Many of the impacts are likely to have a regional epi-centre in the north east of Scotland, which includes the nearest land to the Project as an operational wind farm as well as the area of coast proposed for landfall. This area is within the local authority areas of Aberdeenshire and Aberdeen City. The area of the four wards comprising the hinterland of Aberdeen, Peterhead and Fraserburgh is also represented as a comparator for the socio-economic characteristics of the port data.

1.4.2.5 The geographical location of facilities provided by suppliers has appreciable uncertainty and for this reason, a number of geographical definitions are used at local and regional level as the basis for comparison particularly in relation to employment. These geographies may

include suppliers of smaller or more common components and so may be located inland or in other industrial centres away from the ports where the larger components are expected to be fabricated and assembled.

1.4.3 Temporal scope

1.4.3.1 The temporal scope of the assessment of socio-economics is the entire lifetime of the Project, which therefore covers the construction, O&M, and decommissioning stages.

1.4.3.2 It is anticipated that the construction of the Project will commence in 2030, with the first phase becoming fully operational by 2037. It is anticipated that the second phase of the Project would become fully operational by 2040 and the third phase by 2043. The operational lifetime of the Project for each phase is expected to be 35 years.

1.4.3.3 While the assessment is based on construction beginning in 2030, the assessment adopts a generic approach to comparison that is likely to remain valid for construction starting in neighbouring years.

1.4.4 Identified receptors

1.4.4.1 The spatial and temporal scope of the assessment enables the identification of receptors that may experience a change as a result of the Project. The receptors identified that may experience likely significantly effects for socio-economics are outlined in **Table 1.2**.

Table 1.2 Identified receptors requiring assessment for socio-economics

Receptor	Geographic scope
Employment markets	National, regional and local.
Potential workers	National, regional and local.
Materials, equipment and services markets	National, regional and local.
Potential private sector suppliers, including local business	National, regional and local.
Users; landowners and developers; local authorities with statutory responsibility for planning	Onshore and Offshore Red Line Boundary, ports potentially used for Project activities.
The economy	National, regional and local.
People and communities in the study area	People from areas affected by Project activities within the Onshore Red Line Boundary.
People and communities living and working in the study area	People from areas affected by Project activities within the Onshore Red Line Boundary.
People and communities travelling and accessing land and amenities within the study area	People from areas affected by Project activities within the Onshore Red Line Boundary.
Businesses in the study area	Businesses operating in areas affected by Project activities in the Onshore Red Line Boundary.

Receptor	Geographic scope
Visitors to the study area	Onshore Red Line Boundary.
Local communities	Onshore Red Line Boundary, council wards in ports potentially used for Project activities.

1.4.5 Potential effects

1.4.5.1 Potential effects on socio-economics receptors that have been scoped in for assessment are summarised in **Table 1.3**. Receptors may experience effects during construction, O&M and decommissioning.

Table 1.3 Potential effects for socio-economics

Receptor	Activity and Potential effect
Employment markets	Project demand for labour.
Potential workers	Supply of labour to meet project demand.
Materials, equipment and services markets	Project demand for products and services.
Potential private sector suppliers, including local business	Supply of products and services.
Users; landowners and developers; local authorities with statutory responsibility for planning	Use of land and marine areas.
The economy	Economic activity (GVA) within the local and wider economies.
People and communities living and working in the study area	Increase in population.
People and communities in the study area	Disruption to community access to recreational, tourism and other amenity resources.
Businesses in the study area	Disruption to commercial activities.
People and communities travelling and accessing land and amenities within the study area	Project transport and access requirements.
Visitors to the study area	Activities affecting specific natural assets with socio-economic importance.
Local communities	Socio-cultural and distributional effects.

1.4.6 Effects scoped out of assessment

1.4.6.1 No effects have been scoped out of the assessment. Socio-cultural and distributional effects were proposed to be scoped out in the Scoping Report, but these are now retained and specifically addressed in accordance with the Scoping Opinion.

1.4.6.2 Transboundary effects were proposed to be scoped out at the Scoping stage. The Scoping Opinion did not return a requirement for the Project to scope transboundary effects in so these have not been assessed. The justification or this is provided in **Section 1.13**.

1.5 Methodology for baseline data gathering

1.5.1 Overview

1.5.1.1 Baseline data collection has been undertaken to obtain information over the study area described in **Section 1.3.2**. The current and future baseline conditions are presented in **Section 1.6**.

1.5.2 Desk study

1.5.2.1 The assessment uses standard socio-economic and demographic data from available datasets including the 2021 Census, NOMIS, and the Office for National Statistics (ONS), as well as tourism and visitor information available through the Visit Scotland and the Scotland Tourism Observatory websites. Data such as that from the Scottish Indices of Multiple Deprivation (SIMD) were sourced from Aberdeenshire and Aberdeen City Councils, as well as the Scottish Government and Scotland's Data on a Map (Scottish Government, 2025c), while the National Records of Scotland (NRS) provided data on population and household projects and life expectancy.

1.5.2.2 The data sources that were accessed and used to inform this socio-economics assessment are summarised in **Table 1.4**.

1.5.2.3 Statistical tables and references with details from the sources supporting the baseline description are provided in **Volume 3, Appendix 30.1**.

Table 1.4 Data sources used to inform the socio-economics assessment

Source	Date Accessed	Summary	Coverage of study area
ONS	June to August 2025	This is the national statistical institute of the UK and publishes a range of socio-economic statistics on an ongoing basis.	Full coverage of the study area, at varying levels of disaggregation.
NRS	June 2025	This non-ministerial department of the Scottish Government publishes a range of socio-economic statistics on an ongoing basis.	Full coverage of the study area, at varying levels of disaggregation.
Aberdeenshire Council	June 2025	The local authority provides some regular statistical information as well as ad-hoc specialist reporting.	Partial coverage of the study area, at varying levels of disaggregation.

Source	Date Accessed	Summary	Coverage of study area
Aberdeen City Council	July 2025	The local authority provides some regular statistical information as well as ad-hoc specialist reporting.	Partial coverage of the study area, at varying levels of disaggregation.
Visit Scotland	May 2025	This provides a summary of tourism statistics for the Grampian region, which includes Aberdeenshire.	Full coverage of the study area, at summary level.
Scotland Tourism Observatory	May 2025	This provides a summary of tourism statistics for the Grampian region, which includes Aberdeenshire.	Full coverage of the study area, at summary level.
Scottish Government	June 2025	The National Government of Scotland provides data and reports on deprivation across Scotland, namely the Scottish Index of Multiple Deprivation (SIMD) 2020.	Full coverage of the study area, at varying levels of disaggregation.
Scotland's Data on a Map	June 2025	This provides data and maps relating to SIMD 2020.	Full coverage of the study area, at varying levels of disaggregation.
British Medical Association (BMA)	July 2025	This provides data on patients per General Practitioner (GP) for Scotland.	Partial coverage of the study area, at a summary level.
Public Health Scotland	August 2025	This provides data on the number of GP surgeries in Aberdeenshire and Aberdeen City.	Full coverage of the study area, at a summary level.
UK Land Registry	August 2025	This provides data on the trend of house prices across the Study Area and Scotland.	Full coverage of the study area, at varying levels of disaggregation.
SpatialHub	July 2025	This provides information on the location of community centres and sport and leisure facilities across Aberdeenshire.	Partial coverage of the study area, at a summary level.
Live Life Aberdeen	August 2025	This provides information on the location of community centres in Aberdeen City.	Partial coverage of the study area, at a summary level.
Sport Aberdeen	July 2025	This provides information on the location of sports and leisure in Aberdeen City	Partial coverage of the study area, at a summary level.

Data limitations

1.5.2.4 There are no known data limitations at the time of this study relating to government data used for socio-economics that affect the robustness of the assessment of this EIA Report, except for a minor concern over GP figures which differ for a source from Public Health Scotland and from the British Medical Association as reported in **paragraph 1.6.1.43.**

1.5.2.5 Project cost data prepared by the Applicant in relation to the Project's Supply Chain Development Statement (SCDS) have been used in this assessment to inform assumptions relating to employment and GVA. It is noted that cost data is subject to indexation and is subject to change.

1.5.2.6 It is noted that the threshold for determining the occurrence of data limitations reflects the level of accuracy that can be achieved within the levels of variation implied by the parameters of the Maximum design envelope.

1.6 Baseline conditions

1.6.1 Current baseline

Demography

1.6.1.1 Aberdeenshire is the sixth largest, by size of population, of the 32 administrative areas of Scotland and has approximately 264,000 people making up 4.8% of the national total. While not used further for comparison in this assessment, Aberdeen City, the regional centre, is within a separately administrated district, with an additional 224,000 people. In Aberdeenshire, the proportion of population that is female (50.86%) is more similar to that of Great Britain than Scotland (See **Table 1.5**).

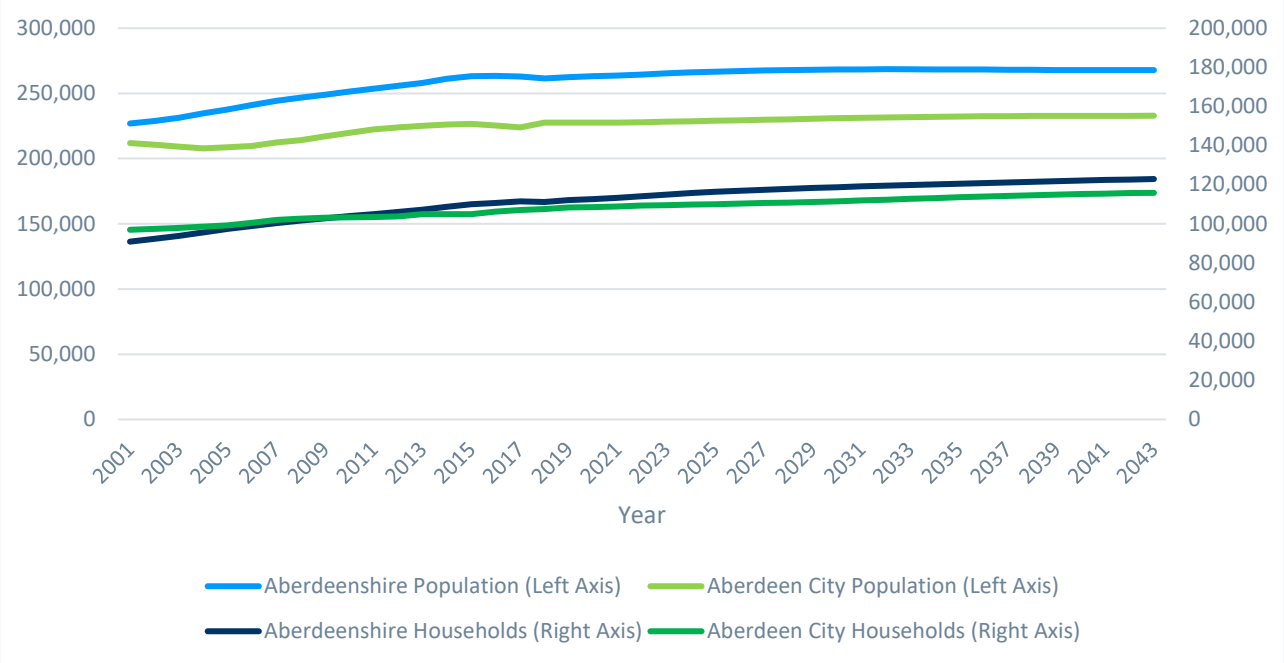
Table 1.5 Population size in Aberdeenshire and comparators in 2022 (ONS, 2024)

	Population			
	Aberdeenshire	Aberdeen City	Scotland	Great Britain
All People	263,750	224,190	5,447,700	65,692,918
Males	129,595	109,584	2,646,659	32,168,180
Females	134,155	114,606	2,801,041	33,524,738
% female	50.86%	51.12%	51.42%	51.03%

1.6.1.2 Over the 20-year period from 2001 to 2020, the population in Aberdeenshire has grown by 16.0%, double the national increase of 8.0% for Scotland, while in Aberdeen City, the population only grew by 7.4%. In, the last five years (2020 to 2024) the average annual growth rate in Aberdeenshire has been +0.22% compared to 0.09% in Aberdeen City, and +0.15% for Scotland (ONS, 2024).

1.6.1.3 Over the same period, the number of households in Aberdeenshire has increased by almost 24%, greater than the increase in population and implying fewer occupants per household and a corresponding growth in housing demand. This is also the case in Aberdeen City, and Scotland as whole, with a 12% increase in households in Aberdeen City (compared to 7.4% population increase), and 14% increase in households in Scotland (compared to *% increase in population). **Plate 1.1** shows the past trends combined with government projections to 2043). In Aberdeenshire and Scotland, for the period 2018 to 2043, the population is currently forecast to grow annually by 0.1% and the number of households by 0.4%. Over the same period the population in Aberdeen City is expected to grow up 0.09% annually, and the number of households will increase by 0.3% annually.

Plate 1.1 Trends in population and numbers of households in Aberdeenshire from 2001 to 2043 (NRS 2020a; 2020b; and 2025)



Gross value added

1.6.1.4 **Table 1.6** below shows the baseline level of economic activity expressed as Gross Value Added (GVA) for Aberdeen City, Aberdeenshire, Scotland, and the United Kingdom for the period of 2019 to 2023 (ONS, 2025a; and 2025b).

1.6.1.5 As of 2023, the combined size of the Aberdeen and Aberdeenshire economies (in terms of GVA, and in current prices) was £18.35 billion, which is equal to 10% of the Scottish economy (£183.47 billion). The Scottish economy itself, in terms of GVA in current prices, makes up 7.4% of the total UK economy (£2,464 billion).

1.6.1.6 Over the period of 2019 to 2023, Aberdeen City has consistently had a higher GVA than Aberdeenshire. Moreover, all of the compared locations showed the same trend with a decrease in GVA between 2019 and 2020, likely due to the COVID-19 pandemic, followed by year-on-year increases up to 2023 in which GVA figures across all areas are higher than those of 2019.

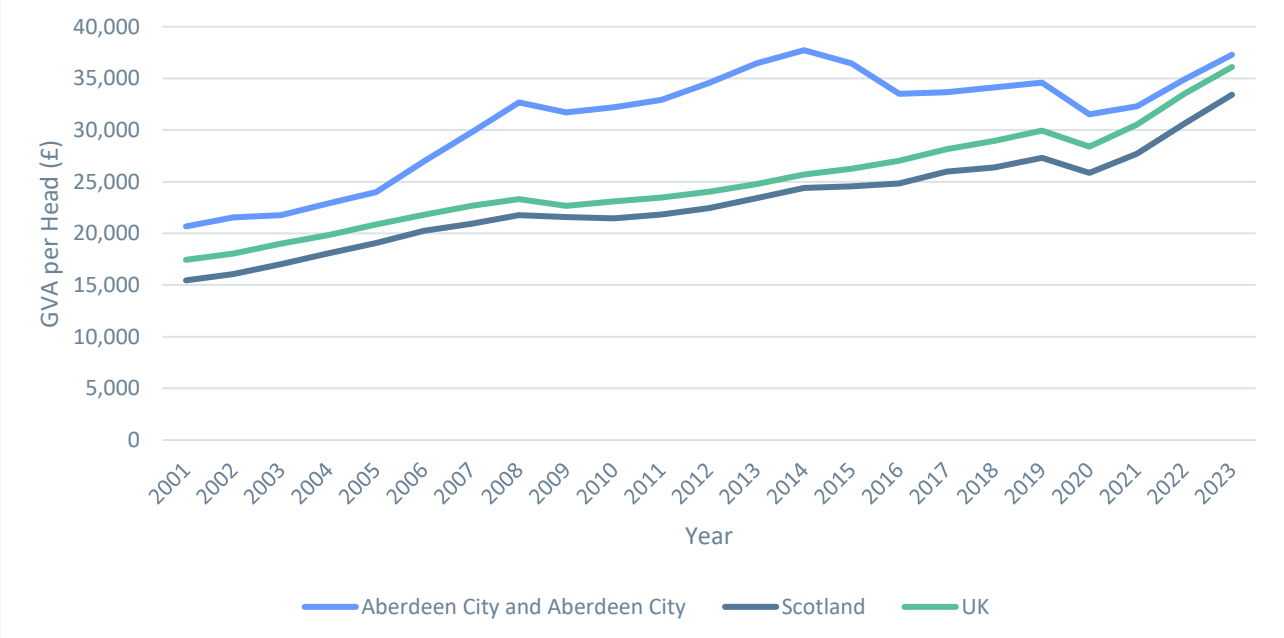
Table 1.6 Regional GVA (current price, as of 2023) for period of 2019 to 2023, in millions (GBP-£) (ONS, 2025a; and 2025b)

Year	GVA (£ millions)			
	Aberdeenshire	Aberdeen City	Scotland	United Kingdom
2019	6,676	10,272	149,254	1,995,708
2020	6,189	9,247	141,398	1,897,155
2021	6,429	9,406	151,916	2,047,932
2022	6,796	10,231	166,866	2,266,082
2023	7,252	11,099	183,471	2,464,587

1.6.1.7 **Plate 1.2** below shows the trend in GVA per head (current price in £s) between 2001 and 2023. The data shows that the GVA per head in Aberdeen City and Aberdeenshire have been consistently higher than the averages for both Scotland and the United Kingdom. This is particularly apparent between the years of 2006 to 2019, in which the gap between the UK average for GVA per head and the GVA per head for Aberdeen City and Aberdeenshire was the largest.

1.6.1.8 As of 2023, Aberdeen City and Aberdeenshire still records the highest figure for GVA per head with £37,295, while Scotland and the UK display figures of £33,419 and £36,103 respectively.

Plate 1.2 GVA per head (current price, as of 2023) for period of 2001 to 2023, in £s (ONS, 2025a; and 2025b)



Economic activity

1.6.1.9 **Table 1.7** below shows the number and rate of those who are economically active in Aberdeenshire and Aberdeen City, along with the rates of those who are economically active in Scotland and Great Britain (ONS, 2025c).

1.6.1.10 The data shows that Aberdeenshire has the highest rate of economic activity of the compared locations with a rate of 80.4%. Both Aberdeenshire (80.4%) and Aberdeen City (77.9%) have a higher economic activity rate than Scotland (76.6%) and Great Britain (78.5%) on average. The data also shows that across all of the compared areas, males are more economically active than females, with the highest proportion being in Aberdeenshire with 86.3% of men being economically active. Aberdeenshire also has the highest disparity between men and women in terms of economic activity, as only 74.4% of women are economically active, 11.9% lower than that of males in the district.

Table 1.7 Economic activity (April 2024 to March 2025) (ONS, 2025c)

Economically Active	Number		% of total			
	Aberdeenshire	Aberdeen City	Aberdeenshire	Aberdeen City	Scotland	Great Britain
All People	145,600	126,200	80.4	77.9	76.6	78.5
Male	79,200	61,200	86.3	78.6	79.7	82.1
Female	66,400	65,000	74.4	77.2	73.6	75.0

Employment

1.6.1.11 There were 100,000 jobs in Aberdeenshire in 2021, which results in a jobs density (jobs per population aged 16-64) of 0.63, lower than the 0.82 for Scotland and the 0.85 for Great Britain (See **Table 1.8**). Scotland as a whole has a weekly pay level that is approximately 1.4% above that of Great Britain, reaching £740.00 in Scotland compared to £729.80 in Great Britain). Scotland has an hourly pay level that is on average approximately 2.4% above that of Great Britain. In Aberdeenshire, pay levels are more diverse with weekly pay levels 7.4% above, and hourly pay less than 4.5% above the levels for Great Britain.

1.6.1.12 Measures of unemployment are relatively low in Aberdeenshire but somewhat high in Aberdeen City. The claimant count in June 2025 was 1.9% in Aberdeenshire and 3.5% in Aberdeen City, compared to 3.1% in Scotland and 4.1% in Great Britain. This shows that Aberdeen City, although possessing a lower claimant rate than the Great British average, sees a higher rate of claimants than other areas in Scotland.

Table 1.8 Recent labour market metrics for Aberdeenshire and comparators

		Aberdeenshire	Aberdeen City	Scotland	Great Britain
Jobs density (2021): jobs per population (1)	[ratio]	0.73	1.07	0.8	0.84
Full-Time Workers (2024) - Gross Weekly Pay	£/week	783.90	721.70	740.00	729.80
Full-Time Workers (2024) - Hourly Pay - Excluding Overtime	£/hour	19.58	18.11	19.19	18.73
Claimant Count (June 2025) (2)	%	1.9	3.5	3.1	4.1
Notes: (1) The density figures represent the ratio of total jobs to population aged 16-64; (2) Data are not seasonally adjusted.					

Income Deprivation

1.6.1.13 The following is drawn from data provided by Aberdeenshire Council (2024), and Scottish Government (2025b; 2020b).

1.6.1.14 Data for 2020 from the SIMD indicated that 9 of the 340 areas in Aberdeenshire, also known as 'data zones', are within the 20% most deprived in Scotland for income. Meanwhile 127 data zones within Aberdeenshire are within the 20% least deprived in Scotland in terms of income, representing a 9% of share of Scotland's 6,976 data zones.

1.6.1.15 SIMD data for 2020 shows that 24 of Aberdeen City's 283 data zones are within the 20% most deprived in Scotland for income. Only 3 of these areas are considered to be within the 10% most deprived. On the other hand, 98 data zones in Aberdeen City are within the 20% least deprived, which represents 81,020 of Aberdeen City's population.

Employment by industry

1.6.1.16 The following is drawn from data provided by the ONS (2025c).

1.6.1.17 There are 100,000 jobs across all ages reported in Aberdeenshire in 2023. The greatest percentage of these (15%) are in 'Sector G: Wholesale and Retail Trade and Repair of Vehicles', a similar percentage to Scotland and Great Britain. The second largest sector in Aberdeenshire is 'C: Manufacturing' which has 13.0% of employees, almost double the average for Scotland of 7.0%. The other sectors with noticeably higher employment in Aberdeenshire are: 'B: Mining and Quarrying', which has 3.0% of the workforce compared to 1.0% in Scotland; 'M: Professional, Scientific And Technical Activities' with 11.0% compared to Scotland's 7.3%; and 'F: Construction' with 7.0% compared to Scotland's 5.1%.

1.6.1.18 In contrast, sectors that are less well represented in Aberdeenshire are: 'Q: Human Health and Social Work Activities', with 10.0% of the workforce compared to 16.2% in Scotland; 'J: Information and Communication' with only 1.5% of the workforce compared to 3.2% in Scotland, 'K: Financial and Insurance Activities' with only 0.6% of the workforce compared to 3.3% in Scotland; and the administrative sectors (N and O) which together have 8.5% in Aberdeenshire compared to 13.5% in Scotland.

1.6.1.19 There are 159,000 jobs across all ages reported in Aberdeen City in 2023, which equates to roughly 73% of the population (See **Table 1.9**). The largest proportion of these (17.6%) are within 'Sector Q: Human Health and Social Work Activities', a greater percentage than Scotland (16.2%) and Great Britain (13.9%). The second largest sector in Aberdeen City is both 'Sector B: Mining and Quarrying' and 'Sector M: Professional, Scientific and Technical Activities', which each have a 12.6% share of employees, in both cases this is significantly above the Scottish and Great British average with the proportion of workers in 'Sector B' being 1.0% in Scotland and 0.1% in Great Britain, and the proportion of workers in 'Sector M' being 7.3 in Scotland and 9.3% in Great Britain. No other sectors in Aberdeen City possessed noticeably higher employment than Scotland and Great Britain averages.

1.6.1.20 The sectors that are least represented in Aberdeen City are: 'C: Manufacturing', with 5.0% of the workforce compared to 7.0% in Scotland; 'J: Information and Communication' with only 1.9% of the workforce compared to 3.2% in Scotland, and 'P: Public Administration and Defence; 'Compulsory social security' with 4.4% of the workforce compared to 6.5% in Scotland.

Table 1.9 Employee jobs in Aberdeenshire in economic sectors 2021

	Number		% of total (*)			
	Aberdeenshire	**Aberdeen City**	**Aberdeenshire**	**Aberdeen City**	**Scotland**	**Great Britain**
Total Employee Jobs	100,000	159,000	-	-	-	-
Full-time	66,000	109,000	66.0	68.6	67.3	68.8
Part-time	33,000	50,000	32.7	31.4	32.7	31.2
Sector	Employee Jobs by Industry					
B: Mining And Quarrying	3,000	20,000	3.0	12.6	1.0	0.1
C: Manufacturing	13,000	8,000	13.0	5.0	7.0	7.5
D: Electricity, Gas, Steam and Air Conditioning Supply	400	500	0.4	0.3	0.8	0.4
E: Water Supply; Sewerage, Waste Management and Remediation Activities	600	500	0.6	0.3	0.8	0.7
F: Construction	7,000	6,000	7.0	3.8	5.1	4.8
G: Wholesale and Retail Trade; Repair of Motor Vehicles And Motorcycles	15,000	17,000	15.0	10.7	13.3	13.7
H: Transportation and Storage	4,500	8,000	4.5	5.0	4.6	5
I: Accommodation and Food Service Activities	7,000	13,000	7	8.2	8.8	8

	Number		% of total (*)			
	Aberdeenshire	**Aberdeen City**	**Aberdeenshire**	**Aberdeen City**	**Scotland**	**Great Britain**
J: Information and Communication	1500	3,000	1.5	1.9	3.2	4.6
K: Financial and Insurance Activities	600	1,000	0.6	0.6	3.3	3.4
L: Real Estate Activities	900	1,500	0.9	0.9	1.4	1.9
M: Professional, Scientific and Technical Activities	11,000	20,000	11.0	12.6	7.3	9.3
N: Administrative and Support Service Activities	5,000	12,000	5.0	7.5	7.0	8.7
O: Public Administration and Defence; Compulsory Social Security	3,500	7,000	3.5	4.4	6.5	4.7
P: Education	8,000	10,000	8.0	6.3	8.5	8.6
Q: Human Health and Social Work Activities	10,000	28,000	10.0	17.6	16.2	13.9
R: Arts, Entertainment and Recreation	2,500	3,000	2.5	1.9	2.8	2.6
S: Other Service Activities	1,500	2,250	1.5	1.4	1.7	1.9
Total	95,000	160,750	95.0	101	99.3	99.8
Notes: (*) Totals in data sources do not add to 100% due to the approach taken to statistical uncertainty.						

Businesses

1.6.1.21 **Table 1.10** below shows the breakdown of the types of businesses present within Aberdeenshire, Aberdeen City, Scotland, and Great Britain.

1.6.1.22 In relation to the data that follow, an enterprise is an organisational unit producing goods or services, which has a certain degree of autonomy in decision-making. An enterprise group is a group of legal units under common ownership. Local units are individual sites that belong to an enterprise.

1.6.1.23 The data shows that 90.2% of enterprises and 85.6% of local units in Aberdeenshire are microbusinesses employing between 0 and 9 employees. Both of these proportions are greater than the average proportions for both Scotland (87.4% enterprises, and 80.7% for local units) and Great Britain (89.1% enterprises, and 84.2% for local units). In terms of enterprises and local units of small (10 to 49 employees) to large (250+ employees) sizes, Aberdeenshire sees a smaller proportion than what is seen in Scotland and Great Britain on average.

1.6.1.24 On the other hand, Aberdeen City has proportionally fewer-than-average microbusinesses for both enterprises and local units with 85.1% and 76.8% respectively. However, for all other sizes of both enterprises and local units, Aberdeen City has a higher-than-average proportion. In terms of large enterprise businesses, Aberdeen City has a proportion of 0.8%, double that of the Scottish and Great British average of 0.4%. Moreover, there are 60 large enterprises within Aberdeen City which is double that seen in the whole of Aberdeenshire (30). Aberdeen City also has a higher-than-average proportion of large local unit businesses with a figure of 0.8% compared to 0.5% in Scotland and 0.4% in Great Britain. On top of this, Aberdeen City is also shown to have over double the number of large local units (80) than the whole of Aberdeenshire (30).

Table 1.10 Business counts (2024)

Size of Business (no. of employees)	Aberdeenshire		Aberdeen City		Scotland		Great Britain
Enterprises	Number	%	Number	%	Number	%	%
Micro (0 to 9)	11,315	90.2	6,685	85.1	150,630	87.4	89.1
Small (10 to 49)	1,045	8.3	890	11.3	18,030	10.5	8.9
Medium (50 to 249)	155	1.2	225	2.9	2,895	1.7	1.6
Large (250+)	30	0.2	60	0.8	705	0.4	0.4
Total	12,540	-	7,860	-	172,255	-	-
Local Units							
Micro (0 to 9)	12,280	85.6	8,025	76.8	174,600	80.7	84.2
Small (10 to 49)	1,735	12.1	1,935	18.5	33,800	15.6	12.7
Medium (50 to 249)	300	2.1	415	4.0	6,820	3.2	2.7
Large (250+)	30	0.2	80	0.8	1,030	0.5	0.4

Size of Business (no. of employees)	Aberdeenshire		Aberdeen City		Scotland		Great Britain
Total	14,345	-	10,455	-	216,240	-	-

Employment deprivation

1.6.1.25 The following is informed by data from Aberdeenshire Council (2024), and Scottish Government (2020; and 2025b).

1.6.1.26 Income domain estimates the proportion of people living within a data zone that are considered as income deprived.

1.6.1.27 Data for 2020 from the SIMD shows that seven areas within Aberdeenshire are within the 20% most deprived in Scotland in relation to employment. Conversely, 124 data zones within Aberdeenshire are within Scotland's 20% least deprived areas, with 24% of Aberdeenshire population living in these areas.

1.6.1.28 SIMD 2020 data indicates that 24 areas with Aberdeen City are within the 20% most deprived areas in Scotland in regard to employment, with only 7 of these being within the 10% most deprived areas. In terms of the least deprived areas, Aberdeen City contains 91 data zones which are within the 20% least deprived areas in Scotland.

Market context

1.6.1.29 The Project generates demand for products and services across an extended supply chain with a mix of those that are locationally specific and others that can be delivered remotely or may have other flexibility in delivery. The activities identified throughout the stages of the Project for construction and operation together with a summary of the market context as assessed in broad terms for the purposes of the EIA for each activity are identified in **Table 1.11**. As the Project and its supply chain are likely to be close to the coast, it is readily accessible using seaborne transport and so suppliers from around the North Sea are part of the same market context, referred to as the "North Sea area".

1.6.1.30 The general summary of the market context is that the Project deployment takes place with access to wide and established markets alongside portside manufacturing, fabrication and installation activities using portside facilities that are locationally specific. The larger markets may also operate globally. Despite differences in size, all markets may experience constraints from a variety of causes. Constraints at Scottish ports may occur due to the geography and level of installed infrastructure while constraints for key components, such as cable, can arise due to lack of manufacturing capacity and competing demands.

Table 1.11 Market context for the Project activities of offshore wind

Project activities	Summary of market context
Construction	
Consultancy and Design	UK has established market for offshore wind consultancy and design services.
Electrical cable and ancillary equipment	North Sea area is a growing market for offshore cable, with major UK/Scotland-based suppliers (JDR, XLCC, Sumitomo).
Nacelle	Global market for manufacture.

Project activities	Summary of market context
Rotor	Global market for manufacture, partially regionalised due to transport costs.
Tower	Global market for manufacture, but regionalised due to transport costs.
Floating substructure	North Sea area is a major established market for offshore infrastructure, but not the large scale and novel deployment required for floating wind.
Floating substructure systems	North Sea area is a major established market for offshore infrastructure, but not the large scale and novel deployment required for floating wind.
Anchor systems	North Sea area is a major established market for offshore infrastructure, but not the large scale and novel deployment required for floating wind.
Mooring systems and ancillary equipment	North Sea area is a major established market for offshore infrastructure, but not the large scale and novel deployment required for floating wind.
Offshore substation - electrical system	North Sea area is a major established market for offshore infrastructure, but not the large scale and novel deployment required for floating wind.
Offshore substation - auxiliary system	North Sea area is a major established market for offshore infrastructure.
Offshore substation - topside	North Sea area is a major established market for offshore infrastructure.
Offshore substation - foundation	North Sea area is a major established market for offshore infrastructure.
Onshore substation - electrical system	UK has established market for onshore electrical network development.
Onshore substation - construction	UK has established market for onshore electrical network development.
Shipping (inbound)	Global market for blade transport from manufacturing sites.
Offshore cable installation	North Sea area is a major market for offshore cable installation, with global suppliers.
Mooring and anchoring installation	North Sea area is a major established market for offshore infrastructure.
Assembly (substructure, turbines) in port	North Sea area is a major established market for offshore infrastructure.
Installation (substructure, turbines)	Requires North Sea port capacity.
Offshore substation installation	North Sea area is an established market for offshore platforms.
Onshore export cable installation	UK has established market for onshore cable installation.

Project activities	Summary of market context
Offshore logistics (including within project shipping)	North Sea area is a major established market for offshore services.
O&M	
Control centre – operations and support	North Sea area is a major established market for offshore services.
Training	North Sea area is a major established market for offshore services.
Logistics services (onshore/offshore)	North Sea area is a major established market for offshore services.
Technical specialists (onshore/offshore)	North Sea area is a major established market for offshore services.
Control centre – operations and support	Requires staff with sector experience.
Insurance	North Sea area is a major established market for offshore services.
Turbine and other technical maintenance	Maintenance market dependent on sales from O&M.
Shipping (project logistics)	North Sea area is a major established market for offshore services.
General port facilities	North Sea area is a major established market for offshore services.
Specialist marine services	North Sea area is a major established market for offshore services.

Education

1.6.1.31 The following is informed by data from the ONS (2025c). The population between 16 and 64 in Aberdeenshire has a higher proportion (59.1%) of people with the highest level of qualification (Regulated Qualifications Framework (RQF level 4 and above) than Scotland (54.5%) and Great Britain (47.6%) (see **Table 1.12** (ONS, 2025c). Aberdeenshire also shows the smallest proportion of people in the lower categories ('Other qualification' and 'No qualifications') with a sample size too small to garner a reliable estimate. At all levels in between, Aberdeenshire exceeds the proportion for Scotland and Great Britain. The overall summary is that Aberdeenshire has a workforce educated significantly above national averages.

1.6.1.32 In Aberdeen City, the population between 16 and 64 also has the highest proportion (63.6%) of people with the highest level of qualification (RQF level 4 and above) (see **Table 1.12** (ONS, 2025c). Aberdeen City also sees a lower proportion of those with 'Other Qualifications' and 'No Qualifications' (at 2.8% and 4.5% respectively) than Scotland and Great Britain. Aberdeen City exceeds the Scottish and Great British proportions for all levels between RQF1 and RQF4. Overall, it can be concluded that Aberdeen City has a workforce educated significantly above the national averages.

Table 1.12 Level of educational qualifications for the population between 16 and 64 in Aberdeenshire and comparators in 2024

Level of qualification	Number		%			
	Aberdeenshire	Aberdeen City	Aberdeenshire	Aberdeen City	Scotland	Great Britain
RQF4 and Above	95,100	99,500	59.1	63.6	54.5	47.6
RQF3 and Above	119,800	124,000	74.4	79.2	72.5	67.9
RQF2 and Above	148,700	143,700	92.4	91.7	87.4	86.7
RQF1 and Above	149,500	145,200	92.9	92.7	88.6	89.1
Other Qualifications	#	4,300	#	2.8	3.4	4.2
No Qualifications	#	7,100	#	4.5	8	6.7
Notes: For period January 2024 to December 2024 In the ONS original source '#' indicates that the sample size too small for reliable estimate						

Education deprivation

1.6.1.33 The following is informed by data from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b).

1.6.1.34 SIMD's education domain measures school attendance and performance, the general population's qualifications, young people Not in Education, Employment or Training and the proportion of 17 to 21-year-olds entering university.

1.6.1.35 SIMD data for 2020 shows that 21 areas within Aberdeenshire are within Scotland's 20% most deprived areas. This includes the areas of Fraserburgh, Peterhead, Inverurie, Huntly, Banff and Mintlaw. Meanwhile, 95 of Aberdeenshire's data zones are within the 20% least deprived areas in Scotland.

1.6.1.36 The data shows that 53 of Aberdeen City's 283 data zones are within the 20% most deprived areas in Scotland in terms of education, this makes up 70,288 people of the city's 228,800 population at the time of the data (30.7%). Conversely, 80 areas within Aberdeen City are within the 20% least deprived in Scotland, these areas account for a population of 66,711 (29.2% of the city's population).

Crime

1.6.1.37 The following is informed by data from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b). The crime domain looks at the number of recorded crimes within a data zone.

1.6.1.38 Data for 2020 from identifies that 84 data zones within Aberdeenshire are within the 20% most deprived when it comes to crime in Scotland. On the other hand, 124 of Aberdeenshire's data zones are within the 20% least deprived in Scotland, and moreover, 48 of these areas have had their figures for the number of crimes recorded suppressed as the value is too low (2 or less).

1.6.1.39 In terms of deprivation in relation to crime, 72 data zones within Aberdeen City are within the 20% most deprived areas in Scotland. Meanwhile, 55 areas within Aberdeen City are within the 20% least deprived in Scotland in terms of crime.

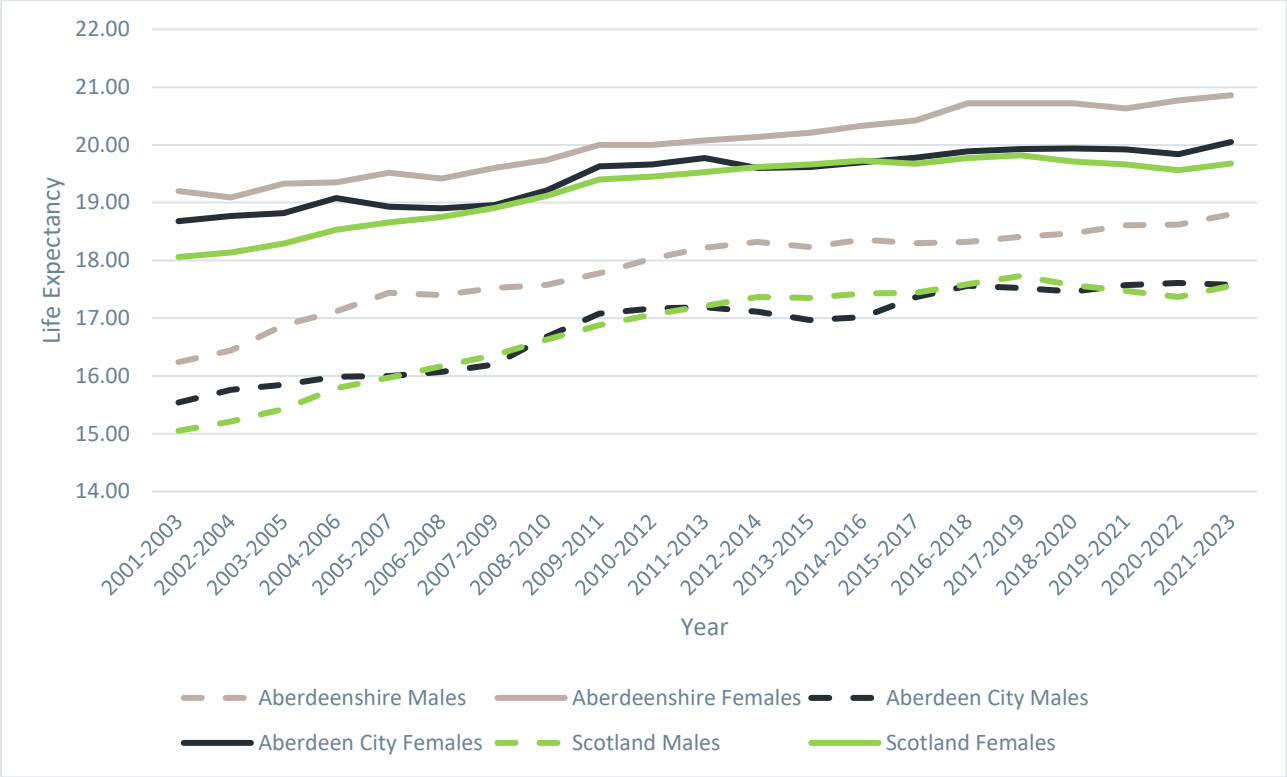
Health

1.6.1.40 The following is informed by data from the NRS (2024).

1.6.1.41 Across the entire data period of 2001 to 2023, life expectancy in Aberdeenshire, for both men and women, has been greater than that in Aberdeen City, as well as Scotland on the whole. Life expectancy in Aberdeen City has seen some small fluctuations in comparison to the overall life expectancy for Scotland but has remained largely consistent with the national figures in the cases for both males and females (see **Plate 1.3**).

1.6.1.42 As of 2021 to 2023, Aberdeenshire continues to have the highest life expectancy for both men and women in comparison to Aberdeen City and Scotland, with figures for males standing at 18.80, and 20.86 for females. On top of this, over the entire period from 2001 to 2023, women have consistently had higher life expectancies then their male counterparts. The largest disparity in life expectancy between men and women in 2021-2023 is seen in Aberdeen City, with figures of 20.05 for women, and 17.58 for men, a difference of 2.47 expected years.

Plate 1.3Life expectancy at 65 (NRS, 2024)



Health service provision

1.6.1.43 The following is informed by data from the BMA (2023) and Public Health Scotland (2022). The level of primary care provision is an indicator of access to health services and the number of patients per GP a commonly used metric. The BMA source identifies an average number of patients per GP in Scotland in 2022 as 1,687 and in Aberdeenshire as 1,232.

1.6.1.44 According to Public Health Scotland, there are 220 GPs in Aberdeen City as of 2022, with a total patient population of 258,078, meaning there are 1,173 patients per GP.

General health and deprivation

1.6.1.45 The following is informed by data from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b).

1.6.1.46 The health domain measures seven indicators covering drug and alcohol use, mortality, long term health, depression, low birth weights and emergency hospital stays.

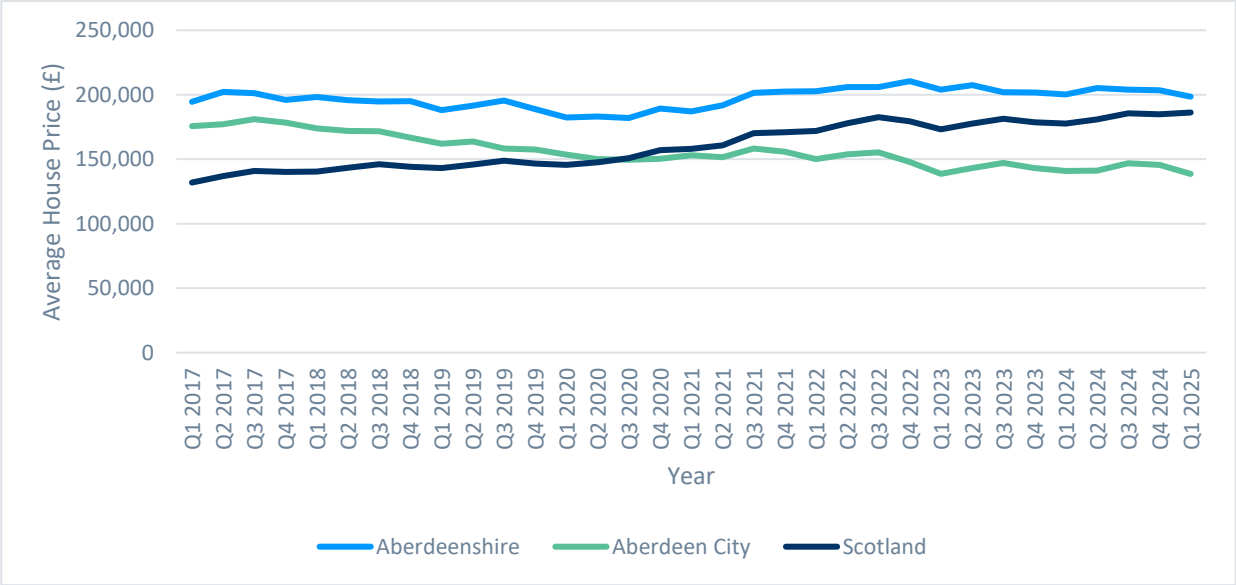
1.6.1.47 Data for 2020 from the SIMD shows that Fraserburgh is the only data zone in Aberdeenshire to fall within the 20% most deprived areas in Scotland in relation to health. 172 of Aberdeenshire's 340 data zones are within the 20% least deprived areas in terms of health deprivation.

1.6.1.48 According to 2020 SIMD data, 29 data zones in Aberdeen City are within the 20% most deprived areas in Scotland in relation to health, with four of these being within the 10% most deprived. 99 of Aberdeen City's data zones are within the 20% least deprived areas in terms of health.

Housing market

1.6.1.49 According to data from the UK Land Registry (2025) (see **Plate 1.4** below) the average house prices in Aberdeenshire between 2017 and 2025 have remain quite stable, with prices remaining around £200,000 across the previous 8 years, other than a small dip in 2020 and 2021. House prices in Aberdeenshire have remained consistently above that of Aberdeen City as well as Scotland as a whole across the period of 2017 to 2025. Meanwhile, average house prices in Aberdeen City have been less stable, with prices generally falling since 2017, all the while, during this same period, average house prices in Scotland have been steadily rising. In Q1 of 2017, the average house price in Aberdeen City was £175,642, while in Q1 of 2025 the price stood at £138,573. Separately, the average house price in Scotland was £131,919 in Q1 of 2017 and stands at £186,214 as of Q1 2025. Comparatively, the latest figure (Q1 2025) for average house price in Aberdeenshire is £198,449.

Plate 1.4 Average House price trends in Aberdeenshire and Aberdeen City 2017 to 2025



* Averages were calculated for each yearly quarter using the data from UK Land Registry

Housing Deprivation

1.6.1.50 The following has been informed by data from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b).

1.6.1.51 The housing domain considers those households classed as “overcrowded” and those households without central heating.

1.6.1.52 SIMD data for 2020 shows there are seven data zones in Aberdeenshire that are considered within the 20% most deprived in Scotland for housing, although one is within the 5% most deprived. There are 112 areas in Aberdeenshire that are considered to be within the 20% least deprived for housing.

1.6.1.53 In Aberdeen City, 98 data zones are considered to be within the 20% most deprived areas in Scotland, this covers 81,448 of the city’s population, or 35.6%. 54 of these 98 areas are also considered to be within the 10% most deprived. 55 areas with Aberdeen City are considered to be within the 20% least deprived areas in Scotland in terms of housing.

Transport and access deprivation

1.6.1.54 The following has been informed by data from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b).

1.6.1.55 The access domain looks at drive times and public transport times to key services and average broadband speeds.

1.6.1.56 Data for 2020 shows that 149 of Aberdeenshire's 340 data zones are within the 20% most deprived areas in Scotland, which is to be expected given that Aberdeenshire is a predominantly rural authority. Of these areas, 52 are within the 5% most deprived areas in Scotland, with the lowest ranking going to the area of Insch, Oyne and Ythanwells, which is the 53rd most deprived area in Scotland in terms of access. In contrast, Aberdeenshire has 50 data zones, which are within the 20% least deprived areas in Scotland in regard to access.

1.6.1.57 SIMD 2020 data shows that 21 data zones in Aberdeen City are considered to be within the 20% most deprived areas in terms of access. Only four of these areas are considered to be within the 10% most deprived. Meanwhile, 84 of Aberdeen City's 283 data zones are within the 20% least deprived areas in Scotland in terms of access.

Overall deprivation

1.6.1.58 The following has been informed by sources from Aberdeenshire Council (2024), and Scottish Government (2020b; and 2025b) and is compiled using SIMD data for 2020 for small "intermediate zones" (data zones) each containing a population of about 800 people which can be collated and matched to wider areas.

1.6.1.59 In terms of overall deprivation, Aberdeenshire performs well as it possesses no data zones within the 5% most deprived areas in the Country. Moreover, Aberdeenshire contains only nine areas that are ranked within the 20% most deprived areas in Scotland in terms of overall deprivation. All nine of these zones can be found in Fraserburgh and Peterhead.

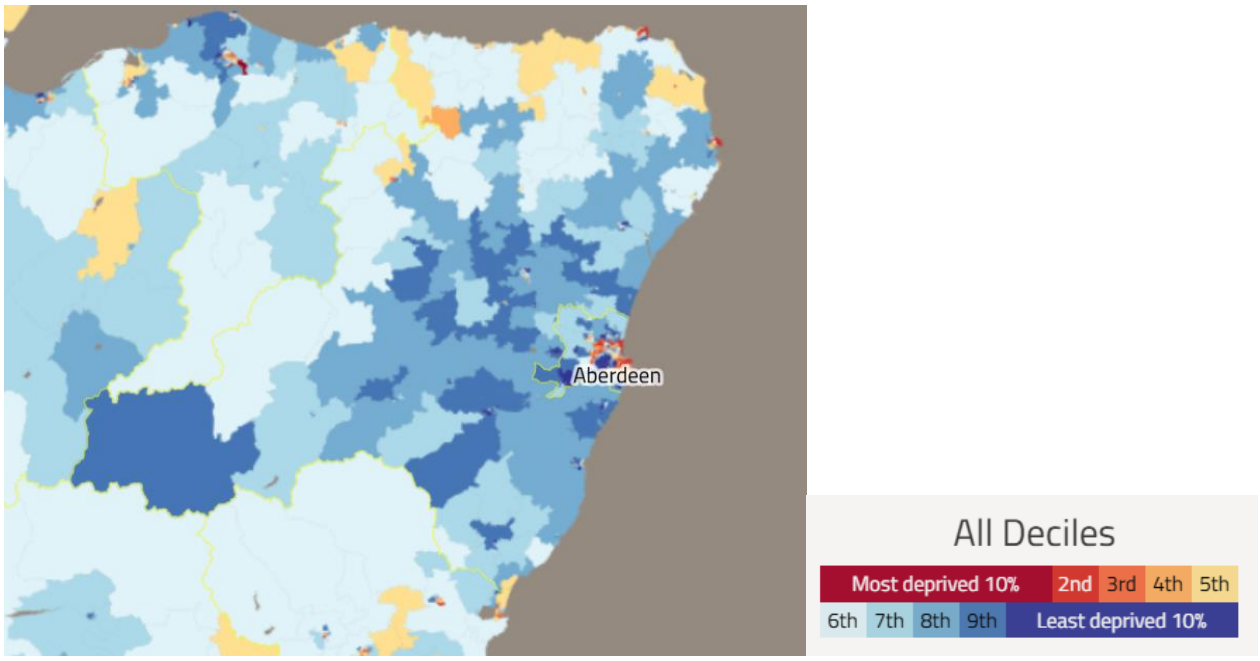
1.6.1.60 In terms of least deprived areas, Aberdeenshire contains 99 data zones (a 29% share of its zones), which are within the 20% least deprived areas in Scotland. These data zones are found across many of Aberdeenshire's settlements and are identified along with detail for Fraserburgh and Peterhead in **Table 1.14**. 22 of Aberdeenshire's data zones are ranked within the 5% least overall deprived areas in Scotland, with the least deprived being Stonehaven which is placed at position 6,959 out of 6,976.

1.6.1.61 Overall, Aberdeen City performs fairly well, however not as well as Aberdeenshire, with SIMD 2020 data showing that 29 data zones within the city are within the 20% most deprived areas in Scotland, with five of these areas considered to be in the 10% most deprived, made up of areas of Torry East, Seaton, Woodside, and Northfield. The most deprived area within Aberdeen City is an area of Woodside which is ranked at 268 out of 6,976, making it within the 4% most deprived areas in Scotland.

1.6.1.62 In terms of least deprived areas, Aberdeen City contains 104 data zones which fall within the 20% least deprived areas in Scotland, with 70 of these areas falling within the 10% least deprived. Aberdeen City contains the 2nd and 3rd least deprived areas in all of Scotland with a data zone with Midstocket ranked at 6,975, and a zone in West End North ranked at 6,974 out of 6,976.

1.6.1.63 **Plate 1.5** below shows SIMD 2020 data for overall deprivation in Aberdeenshire and Aberdeen City, with shades of blue indicating the 50% least deprived and shades of yellow to red indication the 50% most deprived areas. A darker shade of red indicates whether that an area is more deprived, while a darker shade of blue indicates that an area is less deprived.

Plate 1.5 Map showing Scottish index of multiple deprivation 2020 data for Aberdeenshire and Aberdeen City



Deprivation at local level

1.6.1.64 Deprivation may vary appreciably at the local level and **Table 30.13** provides further detail for areas near ports. The area local to a port is represented by one or more Ward/Area with the table showing columns for the Number of data zones for each and the Proportion of those zones that fall within the 20% most deprived in Scotland and 20% least deprived in Scotland. The table is illustrative as the number of data zones is not standardised and would be expected to show values closer to the average where larger numbers of data zones are included. A value of 0% indicates an area without significantly high or low deprivation.

1.6.1.65 Methil shows the greatest proportionate level of deprivation in the Buckhaven, Methil and Wemyss Villages ward (80%) with high levels also in Leven, Kennoway and Largo (26%). The next highest group includes Dundee (37%), Torry/Ferry Hill (32%) in Aberdeen, Fraserburgh (29%) and Burntisland (24%). The existence of local variation in deprivation is shown in a number of places where both proportions are non-zero with sometimes both being high, as in Torry/Ferry Hill and Burntisland. Overall, the areas identified show a wide diversity in levels of deprivation.

Table 30.13 Scottish index of multiple deprivation 2020 data for areas local to ports

Relevant Port	Ward/Area	Number of data zones (nDZ)	Proportion of nDZ within 20% most deprived in Scotland	Proportion of nDZ within 20% least deprived in Scotland	Notes
Invergordon	Cromarty Firth	17	0%	0%	
Fraserburgh	Fraserburgh and District	17	29%	18%	
Peterhead	Peterhead North & South	23	17%	17%	
Aberdeen	George St/ Harbour	8	13%	0%	
	Torry/Ferry Hill	25	32%	32%	
	Turriff and District	6	0%	0%	
	Ellon and District	14	0%	57%	
Nigg	Tain & Easter Ross	5	0%	0%	For data zone: 'Tain'
Ardersier	Culloden and Ardersier	6	0%	50%	Includes 'Inverness Culloden and Balloch' (Overlaps with inverness)
Ardersier	Nairn and Cawdor	18	6%	11%	For data zone: 'Nairn'
Inverness	Inverness	98	14%	17%	Includes 'Inverness Culloden and Balloch' (Overlaps with Culloden and Ardersier)
Burntisland	Burntisland, Kinghorn and Western Kirkcaldy	74	24%	22%	Includes all of 'Kirkcaldy'
Leith	Leith + Leith Walk	32	9%	9%	
	Craigentinny/Duddingston	21	10%	48%	

Relevant Port	Ward/Area	Number of data zones (nDZ)	Proportion of nDZ within 20% most deprived in Scotland	Proportion of nDZ within 20% least deprived in Scotland	Notes
Rosyth	Rosyth	18	0%	0%	
Grangemouth	Grangemouth	29	17%	7%	
	Carse, Kinnaird and Tryst	5	0%	0%	
Methil	Buckhaven, Methil and Wemyss Villages	25	80%	0%	
	Leven, Kennoway and Largo	23	26%	4%	
Dundee	{all}	188	37%	15%	For all of Dundee City
Montrose	Montrose & District	13	0%	8%	
Kishorn	Wester Ross, Strathpeffer and Lochalsh	4	0%	0%	For data zone: 'Lochalsh'
Scapa (Orkney)	Kirkwall	9	0%	0%	

Tourism

1.6.1.66 The following is informed by data from the Scotland Tourism Observatory (2019 and 2023) and the VisitScotland website (2023).

1.6.1.67 Tourism is a key sector in Scotland's economy. In 2023, the Aberdeen, Aberdeenshire and Moray Speyside (Grampian region) saw 278,000 overnight visits by international visitors and 1,067,000 visits from domestic (GB) visitors, associated with spending of £158m, and £252m respectively (VisitScotland, 2023). Compared to 2019, international visits were up by 20.6% and domestic visits down by 2.4%. Total day tourism in Scotland in 2023 was 17,413,405 visits, up by 11.6% compared to 2022 levels.

Community, leisure, and sports facilities

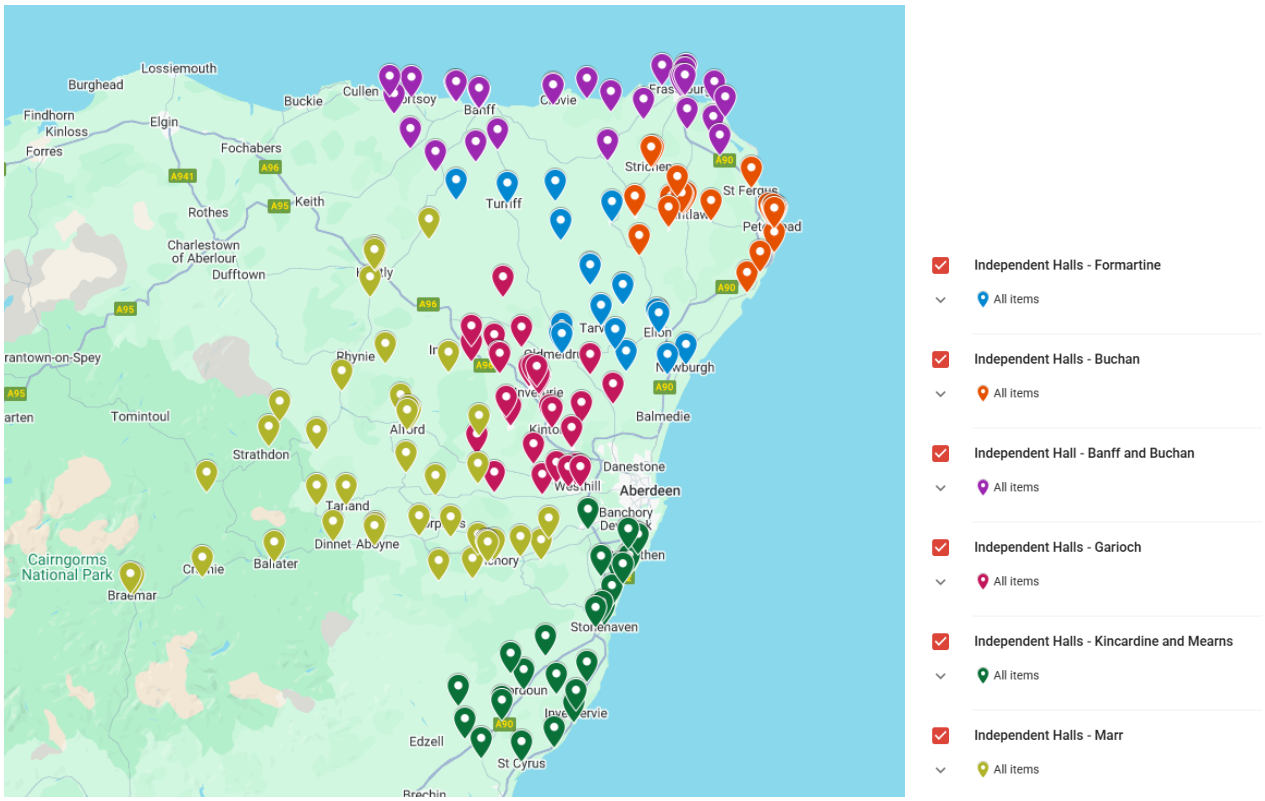
Community facilities

1.6.1.68 There are 18 community centres located across Aberdeenshire. **Plate 1.6** below shows a map of Council-run community facilities across the district (Spatial Hub Scotland, 2023). **Plate 1.7** shows the independent community facilities located across Aberdeenshire (Live Life Aberdeenshire, 2020).

1.6.1.69 Additionally, there are 20 community centres in Aberdeen City (**Plate 1.7**), which are owned by Aberdeen City Council and operated by third party organisations made up of local volunteers (Aberdeen City Council, 2025).

Plate 1.6 Map of community facilities in Aberdeenshire (Spatial Hub Scotland, 2023)

Plate 1.7 Map of independent community facilities in Aberdeenshire (Live Life Aberdeenshire, 2020)



Sports and leisure facilities

1.6.1.70 There are 18 sports and leisure facilities located across Aberdeenshire. **Plate 1.8** below shows a map of sports and leisure facilities across the district (Spatial Hub, 2023).

1.6.1.71 In addition to those in Aberdeenshire, Sport Aberdeen manages 30 sports venues in Aberdeen City on behalf of Aberdeen City Council (Sport Aberdeen, 2025).

Plate 1.8 Map of sports and leisure facilities in Aberdeenshire (Sport Aberdeen, 2025)

Port characteristics

1.6.1.72 The Project will endeavour to use Scottish and UK ports, with an indicative shortlist of ports considered for the construction, O&M and decommissioning stages of the Project identified in **Chapter 4: Project Description**.

1.6.1.73 **Table 1.14** shows the average characteristics of the one, or in some cases two council wards that neighbour or include a working port area. It also includes for comparison the four wards making up the regional epi-centre for Aberdeen, Peterhead and Fraserburgh ("APF Hinterland") comprising Central Buchan, Troup, Turriff and District, and Ellon and District. The information is combined for wards to produce a single figure representative of the area very near each port, and for the regional epi-centre.

Table 1.14 Characteristics of Ports: Socio-economic indicators for neighbouring wards

Port	Local authority	All people	Economically Active (excluding full-time students) - Total	No and Lower school qualifications	Upper school and apprenticeship qualifications	Further education and above qualifications	Commuting more than 20km+ to work	Born in the UK	Lived in the same place for less than 2 years	Lived in the same place for 10 years or more	White: White Scottish	White (non-Scottish)	Other Ethnic groups	Christian	Religion other than Christian	No Religion/Religion not stated	Health reported as Good and Very Good	Health reported as Bad and Very Bad	Household ownership (%)
		Number	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Aberdeen	Aberdeen City	41,600	53.7	25.7	20.5	53.7	3.3	68.1	10.2	9.3	57.0	24.5	18.5	29.2	7.2	63.6	82.9	4.7	35.0
Peterhead	Aberdeenshire	28,443	59.9	45.4	20.1	34.5	15.1	90.1	0.8	5.7	81.1	16.4	2.4	33.7	1.1	65.2	79.0	6.2	66.0
Fraserburgh	Aberdeenshire	15,692	57.7	47.1	19.3	33.5	12.9	89.9	0.4	6.3	83.5	14.9	1.6	38.0	1.1	61.0	77.8	6.7	62.5
APF Hinterland	Aberdeenshire	52,144	61.7	37.9	21.1	41.0	24.2	94.7	0.2	3.6	81.2	16.9	1.8	33.8	1.1	65.1	82.3	4.6	76.5
Ardersier	Highland	24,128	59.6	35.9	20.2	43.8	14.7	92.8	0.7	4.9	77.2	19.9	2.8	36.2	1.6	62.1	80.0	5.9	71.2
Inverness	Highland	21,708	59.5	41.4	17.4	41.2	5.2	87.6	0.9	7.5	76.4	18.4	5.2	35.7	3.0	61.3	75.9	7.9	52.5
Invergordon	Highland	12,747	58.4	45.5	20.6	33.8	17.6	92.5	0.3	4.9	80.9	16.6	2.6	34.0	1.6	64.5	76.5	7.7	56.9
Nigg	Highland	8,784	55.0	40.9	20.6	38.5	14.6	94.8	0.3	3.7	77.2	21.2	1.5	37.9	1.2	61.0	76.7	7.4	65.4
Leith	City of Edinburgh	23,531	70.5	22.8	12.9	64.3	3.3	74.4	3.1	11.7	55.2	31.6	13.2	25.8	6.5	67.7	82.6	5.5	50.7
Rosyth	Fife	15,157	60.2	40.8	20.2	39.0	9.4	92.4	0.7	4.0	81.0	15.6	3.4	29.1	2.2	68.7	77.2	7.1	64.6
Grangemouth	Falkirk	16,016	57.5	47.8	20.4	31.8	9.7	93.8	0.5	3.2	88.2	9.3	2.4	37.3	1.8	60.9	73.1	9.0	57.1
Burntisland	Fife	14,524	55.6	30.7	18.6	50.6	7.2	93.1	0.5	4.4	81.7	14.7	3.6	32.9	2.5	64.6	80.3	5.8	73.9
Methil	Fife	37,573	51.8	45.3	19.0	35.7	12.0	95.6	0.5	2.6	88.2	9.3	2.5	29.1	1.9	69.0	72.5	9.4	57.9
Dundee	Dundee City	17,968	50.1	30.2	19.4	50.4	6.7	77.3	6.1	7.9	63.2	17.2	19.7	27.1	12.9	60.0	78.2	7.0	36.5
Montrose	Angus	15,166	54.9	40.3	19.4	40.4	18.7	94.4	0.2	3.8	85.0	13.1	2.0	32.6	1.1	66.3	78.6	6.6	63.2
Scapa (Orkney)	Orkney Islands	9,345	62.0	36.3	21.6	42.1	2.6	95.6	0.6	2.5	82.2	16.0	1.8	34.9	1.8	63.2	82.2	4.6	63.3
Kishorn	Highland	12,196	58.4	32.0	18.5	49.4	13.6	93.4	0.3	4.5	68.1	29.9	2.0	36.4	1.7	61.9	79.9	6.0	71.0
Scotland	**Total / average**	**5,439,842**	**56.9**	**35.5**	**18.8**	**45.7**	**9.6**	**89.8**	**1.7**	**5.1**	**77.7**	**15.2**	**7.1**	**38.8**	**3.9**	**57.3**	**78.8**	**6.9**	**63.2**
Above Scotland average																			
Below Scotland average																			

1.6.1.74 The levels of economic activity are similar to the Scottish average in most places. The four ports on the east coast between and including Burntisland and Montrose have activity rates below the Scottish average as do Nigg and Aberdeen, but the other ten exceed the average. The highest rate in Leith (70.5%) and the lowest in Dundee (50.1%) compared to the Scottish average of 56.9.

1.6.1.75 The areas near large conurbations (Aberdeen, Leith, Dundee and Burnisland) have higher overall levels of qualifications, while Grangemouth, Rosyth, Inverness and Methil, despite being large towns or near large towns have populations with typically lower levels of qualifications. Levels of qualifications will also reflect differences in the balance of features of ports and harbours such as levels of residential affordability and of industrialised port facilities.

1.6.1.76 Travel to work distances as expressed in the proportion of the workforce travelling more than 20km are lower near the larger conurbations (only 3.3% in Aberdeen) but greatest for the APF Hinterland (24%). The more remote ports in Highland (excluding Inverness) as well as Peterhead, Fraserburgh, Methil and Montrose see similar travel to work distances, but below 20km, all appreciably greater than the Scottish average of 9.6km, which is close to that for Rosyth and Grangemouth.

1.6.1.77 The national identity as indicated by people born in the UK is appreciably above the Scottish average except in the larger centres of Aberdeen, Inverness, Leith and Dundee. The structure of ethnicity broadly corresponds to this, with these larger centres together with Ardersier, Nigg and Kishorn showing a lower proportion of the White Scottish ethnic group. In many ports there are above average levels of White non-Scottish identity and a lower representation of other ethnic groups.

1.6.1.78 The ports in general show lower levels of stated religion than the Scottish average. Dundee and Leith stand out as having appreciably higher levels of religions other than Christian.

1.6.1.79 Poorer health, shown by both lower levels of good health (the Census categories of self-reported "Good" and "Very Good") and higher levels of bad health ("Bad" and "Very bad") is most prevalent in Grangemouth (reported by 73.1% of the population) and Methil (72.5%). The other areas are close to the Scottish average of 78.8% with levels above 82% for Aberdeen and the APF Hinterland.

1.6.1.80 Home ownership shows a variation around the Scottish average of 63.2% but is very low in Aberdeen (35%) and Dundee (36.5%) where there is significant rented accommodation in the wards near the ports. Home ownership is highest in the APF Hinterland and in places where wards are more likely to include more rural areas such as Ardersier and Nigg.

1.6.2 Future baseline

1.6.2.1 The relatively low levels of change in population size over the past five years, together with corresponding low levels of growth forecast for the period to 2030, indicate stability in the underlying socio-economic circumstances (Office of Budget Responsibility, 2025). Expected employment levels may account for commercial commitments in the energy sector, which extend over a number of years and may have reflected a similar stability in their underlying outlook, particularly in established sectors. Scotland has seen appreciable growth since the COVID-19 pandemic, but this is in line with the rest of the UK and in relative terms is relatively unchanging (ONS, 2025d). The latest data on regional GVA is published for 2023 and this is used as a static base year against which to judge impacts arising in all future years. The assessment is conducted in terms of prices prevailing in 2023.

1.6.2.2 The effects of the significant growth in the offshore wind sector from ScotWind and Innovation and Targeted Oil and Gas leasing may not have been included in government forecasts and there is also limited reliable information in the public domain regarding the

outlook for offshore wind farm developers and the feasibility and likelihood of individual projects. Furthermore, the continuing potential for significant changes in global energy prices may affect the context and incentives for oil and gas companies with North Sea interests and the labour market in Scotland, particularly in Aberdeen and Aberdeenshire. As a result, the expectations at the current time for labour markets and the supply chain are particularly uncertain.

1.6.2.3 The **SEAP** identified the following future baseline challenges:

- **Challenge 1:** The demographic trends identified could pose challenges for workforce availability and productivity.
- **Challenge 2:** Despite strong migration inflows, Aberdeenshire attracts relatively few working age migrants, posing potential workforce retention challenges.
- **Challenge 3:** The regional study area experiences notable deprivation in access to services, crime, housing affordability, and education. Concentrations of deprivation are most pronounced in Peterhead and Fraserburgh, where multiple forms of deprivation, including income, education, and crime coincide with challenges regarding transport connectivity.
- **Challenge 4:** Local trends in qualification attainment may present barriers to accessing high-skilled roles in offshore renewables locally, highlighting the importance of targeted skills and training initiatives, specifically in industries and courses that will help address skills shortages in the sector.
- **Challenge 5:** Limited or no work experience presents a key barrier to employment across Scotland, and employment retention rates in the regional study area are below the national average.
- **Challenge 6:** Workforce may require reskilling and adaptation to meet specific demands of offshore wind.
- **Challenge 7:** Housing deprivation indicated by potential challenges in availability of rented tenure properties and slower local house price growth compared to the national average.
- **Challenge 8:** Larger firms dominate engineering, consultancy and legal contracts, while subject matter experts (SMEs) are mainly active in specialist environmental survey work. SMEs typically deliver smaller contracts (<£1m) or act as subcontractors to larger firms and consultancies.
- **Challenge 9:** Scotland lacks serial production facilities, has a fragmented supply chain, and ports are privatised. Within the regional study area, SMEs are primarily active in mooring systems, while cable manufacturing is dominated by larger firms.

1.6.2.4 The **SEAP** identified the following future baseline opportunities:

- **Opportunity 1:** Foundation to develop a growing skilled workforce pipeline for the renewables and related industries supply chain.
- **Opportunity 2:** Foundation to target employability interventions and support to improve job retention in renewables and related industries.
- **Opportunity 3:** Evidence of a strong and engaged workforce with favourable labour market conditions locally.
- **Opportunity 4:** The local employment base is aligned with sectors associated with renewables and related industries

- **Opportunity 5:** Evidence of a dispersed local labour market from which the renewables industries can draw to create local employment opportunities.
- **Opportunity 6:** The regional study area benefits from existing infrastructure, and a robust skills ecosystem with key assets including educational institutions and skills partnerships.
- **Opportunity 7:** The regional study area has considerable expertise in development and project management, with a number of established suppliers.
- **Opportunity 8**: Scotland has strong expertise in installation and commissioning, particularly in offshore logistics, heavy-lift operations, subsea engineering, and port services. Larger contractors deliver major contracts, while specialist SMEs provide niche services within wider installation packages.
- **Opportunity 9:** Scotland has strong O&M capabilities, particularly in the regional study area around Aberdeen, leveraging the established oil and gas supply chain. Ports are a key enabler for O&M, with most suitable construction and operational ports located in the regional study area.

1.7 Basis for the EIA Report

1.7.1 Maximum design scenario

1.7.1.1 The maximum design scenario parameters that have been identified to be relevant to socio-economics are outlined in **Table 1.15**.

Table 1.15 Maximum design scenario for impacts on socio-economics

Activity / impact	Maximum design scenario parameter	Justification
Impact 1: Project demand for labour	When demand for labour is aligned with the "Commit scenario" for employment in Scotland as reported in the Supply Chain Development Statement (SCDS) for the Applicant (see **Section 1.9**).	The benefit from Project demand for labour is lowest in the Commit scenario.
Impact 2: Supply of labour to meet project demand	When local labour supply is limited to a small area, such as Aberdeen City and Aberdeenshire.	Greatest impact occurs when labour markets have limited capacity, due to factors such as small size, remoteness, or serving of coincident demands. A low value for the size of market is used.
Impact 3: Project demand for products and services.	When demand for products and services is aligned with the "Commit scenario" for purchases in Scotland.	The benefit from Project demand for products and services is lowest in the Commit scenario.
Impact 4: Supply of products and services.	When supply of products and services is only from operators with limited ability to increase capacity. When supply of products and services is from operators with a limited number of operational facilities in Scotland.	Greatest impact occurs when product and service markets have limited capacity, due to factors such as their small size, availability of skills or fabrication facilities (directly or indirectly in supply chains), complexity in supply chains, or serving of coincident demands. A low value for the size of market is used.
Impact 5: Use of land and marine areas.	When Project activities are as close as feasible to existing centres of socio-economic activity important to the local economy and local communities and close to resources used, as well as lying within the scope of limits to the Project design envelope.	Greatest impact results from disruption of existing socio-economic activities when they are nearby.
Impact 6: Project expenditure increasing economic activity (GVA) within the local and wider economies.	When Project expenditure is assumed to occur only within a limited area of Scotland and within the temporal scope of the Project period (corresponding to low leakage). When Project expenditure is assumed to be widely distributed across the economy (corresponding to high leakage).	Greatest impact on economic benefits result when Project activities entrain additional economic activity (shown by GVA uplift within the local and wider economy). The greatest uplift is when activities are concentrated ("leakage" is low) and least when activities are distributed (leakage is high).

Activity / impact	Maximum design scenario parameter	Justification
Impact 7: Increase in population.	When population increase reflects the assumption that additional employment in the local economy will occur within a limited local market (See Impact 2).	Greatest impact from increase in population results when it is localised, which occurs when Project employment is also localised (See Impact 2).
Impact 8: Disruption to community access to recreational, tourism and other amenity resources.	When Project activities are as close as feasible to existing centres of socio-economic activity important to the local economy and local communities and close to resources used, as well as lying within the scope of limits to the Project design envelope defined.	Greatest impact occurs when Project activities are concentrated in time and space, reflecting concentration of Project employment and specific locations of activity, and are near existing activities.
Impact 9: Disruption to commercial activities.	When Project activities are as close as feasible to existing centres of socio-economic activity important to the local economy and local communities and close to resources used, as well as lying within the scope of limits to the Project design envelope.	Greatest impact occurs when Project activities are concentrated in time and space, reflecting concentration of Project employment and specific locations of activity, and are near existing activities.
Impact 10: Project transport and access requirements.	When Project activities are near to or otherwise interact with known transport networks and access arrangements, as well as lying within the scope of limits to the Project design envelope.	Greatest impact occurs when levels and locations of Project activity most interact with existing transport networks and arrangements for access.
Impact 11: Activities affecting specific natural assets with socio-economic importance.	When Project activities are as close as feasible to specific natural assets important to the local economy and local communities, while also constrained by the limits to the Project design envelope.	Greatest impact occurs when Project activities are concentrated near specific natural assets.
Impact 12: Socio-cultural and distributional effects.	When Project activities are distributed to result in the least beneficial effects on socio-cultural values.	Greatest impact occurs when Project activities are targeted on achieving beneficial change in socio-cultural values.

1.7.2 Embedded environmental measures

1.7.2.1 During the Project's design, a number of embedded environmental measures have been adopted to reduce the potential for adverse impacts on socio-economics. These embedded environmental measures have evolved over the development process as the EIA has progressed and in response to consultation.

1.7.2.2 These measures also include those that have been identified as good or standard practice and include actions that would be undertaken to meet existing legislation requirements. As there is a commitment to implementing these embedded environmental measures and also to various standard sectoral practices and procedures, they are considered inherently part of the design of the Project and are set out in the EIA Report.

1.7.2.3 **Table 1.16** sets out the relevant embedded environmental measures within the design and how these affect the socio-economics assessment.

1.7.2.4 Further detail on the embedded environmental measures in **Table 1.16** is provided in the **Volume 3, Appendix 5.2: Commitments Register**, which sets out how and where particular embedded environmental measures will be implemented and secured.

Table 1.16 Relevant socio-economics embedded environmental measures

ID	Environmental measure proposed	Project stage measure introduced	How the environmental measures will be secured	Relevance to socio-economics assessment
M-219	Fisheries Fund: A Fisheries Fund shall be established for the array area (with the OAA) once determined, operating during the construction stage and extending through the first five years of operation. The Fund shall be directed towards fisheries where moderate adverse effects are identified within the EIA Report. The Fisheries Fund shall not provide direct compensation to individual businesses. Instead, it shall support the fishing sector more broadly by funding research and initiatives that promote co-existence, adaptation, and resilience. Priority areas of support shall include: • Research and enhancement of target fish and shellfish stocks to strengthen ecological resilience and sustainability for example, Nephrops, monkfish and haddock. • Co-designed initiatives such as gear innovation, diversification, operational adaptation, and business resilience. • Collaborative, evidence-based investment to improve the long-term viability of fisheries. Commitment is made to consult with the fishing industry and the scientific community to define administrative arrangements, identify research priorities, and ensure transparent governance.	EIA Report.	s.36 conditions and marine licences conditions.	Enhancement of fish and shellfish stocks supports commercial fishing displaced from the OAA and helps maintain levels of catches and associated economic activity.
M-222	Fisheries monitoring and related updates to a **Fisheries Mitigation, Monitoring and Communication Plan** (FMMCP): A fisheries monitoring programme shall be implemented to understand variations in commercial fisheries activity in response to construction of the project and to inform updates to the FMMCP. The programme shall comprise the collation and analysis of commercial fisheries landings and activity data (including landings statistics, VMS datasets, and other available sources), together with consultation with the fishing industry. Monitoring shall extend	EIA Report.	s.36 conditions and marine licences conditions.	Monitoring commercial fisheries activity in response to the Project and trends in landings by port and species supports the sector and contributes to maintaining related economic activity.

ID	Environmental measure proposed	Project stage measure introduced	How the environmental measures will be secured	Relevance to socio-economics assessment
	across pre-construction, construction, and post-construction stages, with annual reporting. The programme shall assess trends in fishing activity, landings by port and species, and fishing vessel presence, and shall review guard vessel and Marine Coordination Centre records where available. Monitoring outputs shall be used to validate assessment assumptions, identify emerging issues, and inform any necessary updates to the FMMCP. Where monitoring demonstrates the need for additional action, further mitigation shall be developed and implemented in consultation with regulators and stakeholders.			
M-224	Adherence to the SCDS in relation to use of local workforce and supply chains.	EIA Report.	The Applicant has made commitments to skills, training and employment and intends to draw on local workforce and supply chains where possible and to work with the local authority employment and economic development teams and other local agencies to maximise benefits for local people.	Beneficial for relationships between the Project and employment markets.
M-225	Communication of working schedules to avoid and minimise disruption.	EIA Report.	The Applicant will implement construction mitigation measures including communication of construction and operational schedules to avoid and minimise potential effects on people and communities including local businesses, and amenity, recreation, and	Beneficial to use of facilities and resources by local communities.

ID	Environmental measure proposed	Project stage measure introduced	How the environmental measures will be secured	Relevance to socio-economics assessment
			tourism facilities and related resources.	
M-226	Communication plan for community engagement and support.	EIA Report.	The Applicant will implement a communications plan that provides for community engagement and community support including a public-facing website.	Beneficial for knowledge of the Project by local communities.
M-227	Customised plan for decommissioning stage.	EIA Report.	The Applicant will implement a Decommissioning Programme so that activities meet relevant statutory requirements, reflect commitments made to stakeholders and take account of relevant technology developments and good practice.	Socio-economic circumstances in the future will be taken account of.
M-228	Development, finalisation and implementation of a Socio-Economic Action Plan for the Project.	EIA Report	The **SEAP** sets out the measures to harness the local and regional opportunities and maximise the social and economic performance of MarramWind offshore wind farm.	Adds confidence to projections of positive socio-economic benefits.

1.8 Methodology for EIA Report assessment

7.3.1 The project-wide approach to assessment is set out in **Chapter 5: Approach to the EIA**. Whilst this has informed the approach that has been used in this socio-economics assessment, it is necessary to set out how this methodology has been applied, and adapted as appropriate, to address the specific needs of the socio-economics assessment.

7.3.2 There are no specific guidelines or requirements for socio-economic assessments set out in any statutory guidance regarding the preparation of an EIA. However, such assessments have an established practice of including a description of the direct socio-economic consequences of the effects on the environment as experienced by people and communities locally and, where appropriate, more widely. The method adopted is therefore one of determining the existing and future circumstances for these communities (the baseline) followed by the assessment of relevant topics and effects on individual receptors. The approach uses desk-based analysis, drawing on statistical information and professional judgment/opinion as well as relevant government advice and other guidance.

1.8.1 Significance evaluation methodology

Overview

1.8.1.1 The significance level attributed to each effect has been assessed based on the value of the affected receptor and the magnitude of change resulting from the Project. The level of significance has then been determined by the combination of value and magnitude.

Identification of effects

1.8.1.2 The simplest specification of the topics covered by socio-economics are those affecting 'people', commonly supplemented by more specific characterisations of groups or organisations they belong to, such as 'workforce', or according to religious beliefs. In assessment, individuals and groups are termed receptors. An individual may appear under more than one receptor heading, for example, as a member of the workforce and as a local resident. The identification of possible effects on these receptors follows the principles underpinning EIA, including the principle of scoping. The impacts resulting from the activities related to the Project are identified and described according to knowledge of how activities related to it will occur. Such knowledge is continuously evolving as the design and understanding of the Project advances. Socio-economic effects may also arise from specific changes to the environment and be assessed using evidence provided in support of assessment of other EIA aspects.

1.8.1.3 The likely significant effects are presented in **Table 1.17** and comprise those that are currently understood to require assessment. The list is based on information currently available regarding the Project, review of previous impact assessments for similar developments and consideration of the range of potential socio-economic and health impacts that may occur.

Value of receptor

1.8.1.4 The sensitivity of a receptor is a summary term that describes the ability of the receptor to withstand or absorb change within the period of time the impact is expected to occur and without a fundamental change to its character or attributes. Sensitivity to socio-economic and effects has no single interpretation and can be seen as capturing the concept of a value that is potentially threatened or enhanced. A range with four levels of sensitivity (high, medium, low and very low) is used to describe receptors. Sensitivity of receptors may

depend on their current and future characteristics as well as the nature of the impact, reflecting aspects such as:

- capacity and availability of community resources;
- previous experience of socio-economic change;
- vulnerability from pre-existing social circumstances or health conditions;
- cultural values, including public interest, perceptions towards a risk or potential change, and acceptability;
- environmental vulnerability of habitats important to the socio-economic and health context (such as open space and public parks); and
- the direction, duration and reversibility of the specific impacts.

Magnitude of changes

1.8.1.5 The magnitude of change is a summary term used to describe the features of an effect that can be represented as varying over a range. Straightforward effects may be represented with quantitative indicators, such as employment relative to a national average, but other effects may need a semi-quantitative or qualitative approach to account for variation. A range with four levels to represent the magnitudes of effects (i.e. high, medium, low and very low) is used and covers features such as:

- a general concept of scale or extent (for example, number of groups and/or people, households or businesses affected;
- spatial area affected); the duration and frequency of effects and whether they are permanent or time-limited (short, medium, long);
- the direction of change and its reversibility; and
- the probability of occurrence.

1.8.1.6 The assessment of the magnitude of change is based on a comparison of baseline conditions with outcomes with the Project. This assessment makes use of supporting indicative Assessment Thresholds (IAT), defined here based on a quantitative scale that was originally developed for the major power station project at Hinkley Point C (EDF Energy, 2011). This shares a similar context of industrial energy development near coastal towns with rural hinterlands and has substantial ongoing supporting analysis. The assessment of the Project uses the IAT in assessing the magnitude of change (see **Table 1.17**).

Table 1.17 Indicative Assessment Thresholds for magnitude of change

Change and level of impact	Very low	Low (“slight”)	Medium (“moderate”)	High (“major”)
Change in employment level in the local economy	Negligible change in baseline employment levels	Noticeable change of less than +/- 1% on baseline employment levels in the local economy	Change of +/- 1-2% on baseline employment levels in the local economy	Change of more than +/- 2% on baseline employment levels in the local economy
Change in employment	Negligible change in	Noticeable change in employment of +/- 5%	Change in employment of	Change in employment of

Change and level of impact	Very low	Low ("slight")	Medium ("moderate")	High ("major")
structure in the local economy	baseline employment levels	in any sector of the local economy	+/- 5-10% in any sector of the local economy	more than +/- 10% in any sector of the local economy
Change in levels of local expenditure by local employers/employees	Negligible change in local expenditure	Noticeable change of less than +/- 1% on baseline expenditure levels in the local economy	Change of +/- 1-2% on baseline expenditure levels in the local economy	Change of more than +/- 2% on baseline expenditure levels in the local economy
Change in unemployment level in the local economy	Negligible change in unemployment levels	Change of +/- 5% in claimant unemployment level	Change of +/- 5-10% in claimant unemployment level	Change of more than +/- 10% in claimant unemployment level

Significant evaluation

1.8.1.7 Significance of effects is assessed including embedded environmental measures which may avoid, enhance, reduce or compensate for effects.

1.8.1.8 Outcomes for assessments of significance use the categories of 'Major', 'Moderate', 'Minor' or 'Negligible'. Effects can be either beneficial or adverse. The significance of effects is assessed through the evaluation of the combination of the magnitude of effects and sensitivity of receptors within the context of the effect (**Table 1.18**) and the final summary of significance is to be presented in a table showing each effect and identifying whether it is beneficial or adverse together with the accompanying rationale.

Table 1.18 Significance assessment matrix for the significance of residual effect

		Magnitude of change			
		High	**Medium**	**Low**	**Very low**
Value / sensitivity	**High**	**Major (Significant)**	**Major (Significant)**	**Moderate (Potentially Significant)**	**Minor (Not Significant)**
	Medium	**Major (Significant)**	**Moderate (Potentially Significant)**	**Minor (Not Significant)**	**Minor (Not Significant)**
	Low	**Moderate (Potentially Significant)**	**Minor (Not Significant)**	**Minor (Not Significant)**	**Negligible (Not Significant)**
	Very low	**Minor (Not Significant)**	**Minor (Not Significant)**	**Negligible (Not Significant)**	**Negligible (Not Significant)**

1.8.2 Structure used for the assessment of construction, O&M and decommissioning effects

1.8.2.1 The following factors affect the structure used below for the assessment of effects:

- The Project has overlapping periods of construction and operation because as each stage is constructed and commissioned it becomes operational;
- There is a range of market choices and related variations in contracting and design strategies which leads to uncertainty in the location, type and scale of Project activities (beyond the specification of a maximum design scenario); and
- Many of the socio-economic effects are closely related to employment numbers, skills, and locations.

1.8.2.2 The assessment begins by assessing the effects of employment. Both construction and operation lead to employment at ports and both construction and operation have flexibility in which ports are used. The simplest assessment is of a workforce size compared to a location it may operate in. These comparisons are valid for both a construction and operational workforce. The assessment compares workforce impacts across local authority areas and ports for a given workforce size. The largest workforce requirements occur when phases 1 and 2 are operational and phase 3 is in construction.

1.8.2.3 Due to uncertainty, the deployment of the construction or operational workforces may occur at one or many ports. As such, the primary concern is the effects of a workforce size at different ports, regardless of whether it is a construction or operational workforce. Similarly, the main concern of a deployment plan used to mitigate or enhance socio-economic effects will be the distribution of employment to one or more locations. Locations have very different socio-economic characteristics and Project employment may play very different roles in local communities as a result.

1.8.2.4 As decisions over construction and operational locations are not made yet, the assessment can only provide information which contrasts the levels of workforce and the socio-economic conditions at the locations where they may work. The main output is the contrast between employment levels and locational characteristics. The assessment discusses these differences in **Section 1.9**, highlighting the relevant employment markets and port characteristics. Short supplementary sections cover further aspects only relevant to O&M and decommissioning.

1.8.2.5 The following section provides a more general consideration of employment magnitudes which is used as a basis for the subsequent assessment sections.

1.8.3 Overall consideration of the magnitude of employment effects during construction, O&M and decommissioning

Introduction

1.8.3.1 This Section considers the magnitude of employment effects of the Project, which are also closely related to other economic and social effects. Employment effects may occur in different ways due to a range of possibilities for the supply chain but can be seen in terms of maximum and minimum magnitudes of effects.

1.8.3.2 Aggregated employment effects at national level are considered first because this provides basic comparators in terms of magnitude and sensitivity at national level and also sets the context for more detailed considerations at smaller geographies.

1.8.3.3 The assessment uses the expected Project expenditure as an indicator of the level of impacts on the supply chain in Scotland and the associated employment and economic effects. These are distinguished as 'direct effects' arising from new staff directly employed and contracted by the Applicant and 'indirect effects' arising from associated changes in expenditure and employment in the supply chains for products and services. A further category of 'induced effects' results from personal spending by employees and supply chain workers from their salaries. The magnitude of indirect and induced effects is commonly estimated using a factor (a 'multiplier') of the direct effects.

1.8.3.4 The expected expenditure by the Project is identified in the MarramWind SCDS (MarramWind Limited, 2023b). This has been used together with the estimated development timeline (see **Chapter 4: Project Description**) and industry parameters to develop a representation of the employment profile in Scotland over the 12-year construction period and the associated economic effects in terms of GVA. The representation includes both construction and operational employment as they will occur together when operational activities of early phases overlap with construction activities of later phases. The assessment is simpler overall when recognising this overlap within the Project development programme.

1.8.3.5 The construction employment representation is developed for the 12-year period assuming that the expenditure is equally divided between the three development phases (representing the intended incremental build-out) and activities without, for example, including learning curve effects. The definition of "jobs" used below is the level of annual employment in each year. An average is also calculated over the 12-year period to give the average level of jobs in an average year. In the operational stage, once demand for operational employment is generated, these jobs are assumed to exist continuously after the wind turbine generators (WTGs) are installed.

1.8.3.6 This assessment reflects a maximum design scenario principally because it considers the combination of direct employment and indirect employment. This may occur at a single location, such as at a dockside repair facility where direct employment by the Applicant is supplemented by services provided by a subcontractor, but indirect effects will often occur at a different location. Furthermore activities with higher staffing levels, such as for O&M activities, typically have smaller levels of indirect effects, so the combined direct and indirect employment effects is not greatly different to the direct effects compared to the levels of other uncertainties, and so provides a representative common maximum.

1.8.3.7 In contrast, consideration of peak employment, while reported in the assessment, is not included in the definition of the maximum design scenario as an assumption is made that the differences between alternative supply chain configurations, such as use of one location or supplier rather than another, will substantially exceed the proportionately smaller temporal variation in employment levels shown by a peak level derived from early construction designs. Further designs are also likely to have smoothing of employment profiles over time as a primary focus as this benefits employers and employees while the total impact on overages over time (or on totals in terms of job-years) is not affected by peak levels.

1.8.3.8 This maximum design scenario representation also covers the potential variation of the design envelope in **Table 1.15** because, for socio-economics, the variation in effects is again seen in the alternative spatial and temporal configurations of the supply chain. This variation is expressed in the assessment through consideration of different potential manufacturing locations in Scotland and different potential ports for final assembly and operations and maintenance activities.

Job roles and industry sector definitions for the offshore wind sector

1.8.3.9 The offshore wind sector is not specifically identified within the standard sectors defined in government statistical reporting and so does not have an exact comparator within the established recording of economic sectors. As a substitute, this assessment is informed by sector groupings that reflect the structure of job roles identified in a survey from 2023 from the Offshore Wind Industry Council, noting that this may be influenced by the relatively nascent state of major component manufacturing in the UK and so reporting a lower proportion of fabrication and installation roles than would be expected when construction is more advanced. It may also under-represent firms in the wider supply chain serving more general requirements such as supply of aggregates, steel-making and forming. The survey results are shown in **Table 1.19**.

Table 1.19 Breakdown of UK Offshore Wind workforce by Job Role grouping

Job Role	% of Workforce
Aviation	<1
Commercial	7
Consenting	4
Construction General operatives	10
Corporate Services	9
Development and Training	4
Electrical	2
Facilities	3
Health, Safety Environment and Quality	4
Management	16
Marine	1
Mechanical	2
O&M	26
Subsea	1
Technical/Professional	11
Total	*100*

1.8.3.10 The composition of job roles by sector shows a breadth of requirements and skills that are potentially transferrable from sectors that are explicitly identified in government statistical reporting. As such, the offshore wind sector does not compete for a workforce with just one sector and its requirements are likely to affect the existing sectors to different degrees depending on their level of commonality. As a growing sector, the offshore wind sector will inherently need to attract a workforce of people who have not worked in the sector before, as well as more experienced workers who may migrate to an area.

1.8.3.11 The sectors that are selected as comparators in this assessment include the following, which are understood to offer collectively many of the roles identified by the Offshore Wind Industry Council (2023) as relevant to the offshore wind sector:

- B : Mining and quarrying (used in government statistics to cover oil and gas sector)
- C : Manufacturing
- F : Construction
- G : Wholesale and retail trade; repair of vehicles
- H : Transportation and storage
- M : Professional, scientific and technical activities
- N : Administrative and support service activities

1.8.3.12 In addition, the combination of the individual sectors of 'B: Mining and Quarrying', 'C: Manufacturing', and 'F: Construction' is also used as a comparator (referred to below as the "BCF" sector).

1.8.3.13 Although it is possible in principle for multiple activities relating to offshore wind to take place in a single cluster, such as in an as-yet-undeveloped integrated coastal super-facility, in Scotland the provision of each type of function is more likely to be located where there are existing resources and a skilled workforce. These locations are inherently attractive to the Project as they provide benefits to the Project such as increased availability of skills and competition between suppliers and potential workers. They also inherently mitigate the effects of the Project as the existing employment markets will be larger, less sensitive to change and more resilient overall. In practice, the Project effects will be spatially and temporally dispersed in line with supply chain capacity, the preferred distribution of employment, and the need to avoid concentrations that adversely affect logistics and market prices.

Magnitude of employment effects: national level

1.8.3.14 The result of the representation of employment for the Project over time leads to effects at a national (Scotland) level that are broadly consistent with the industry indicative benchmark of approximately 2,000 full-time equivalents (FTEs) required for one Gigawatt of WTG capacity (Connon and McFarlane, 2024; and Scottish Renewables, 2025).

1.8.3.15 The representation of employment indicates that over the 12-year construction programme an average of 1,250 jobs are created across construction and operational roles reflecting expenditure in Scotland in the "Commitment" scenario identified in the SCDS. These effects result from direct employment by the Applicant and indirect employment in the supply chain. Approximately one half is direct employment and the other half is indirect, reflecting research by the Offshore Wind Industry Council (2023).

1.8.3.16 For the purpose of presenting a maximum design scenario, employment effects have been calculated using standard industry classification (SIC) codes representative of the activities currently used for the construction and operations of floating offshore wind farm projects. As floating offshore wind remains a nascent technology with considerable scope for optimisation, new technologies and techniques may be adopted by industry within the Project's 12-year construction programme and / or the 35-year operational lifetime of each phase, which may not fully reflect the SIC codes used for the assessment of employment effects. This may include the use of highly automated component manufacturing, new techniques for construction and / or the emergence of technologies that allow for enhanced maintenance offshore. Particular impact could be caused by the development of major component replacement technologies and techniques as these are not presently available,

and therefore the assessment assumes that major component replacement would require the turbine to be towed to port to allow for major component replacement. However, technologies are currently being developed for the purpose of enabling major component replacement to occur offshore. The magnitude of effect for the economy of Scotland would remain the same if new, more efficient technologies and techniques became available and were utilised in the construction and / or operation of the Project, but the local labour market effects, particularly at Scottish ports, may be lessened.

1.8.3.17 During each of the three phases of construction, components are required to be built and installed. Employment for fabrication and assembly will be distributed across locations in Scotland and through international supply chains linking manufacturing to the offshore location for final installation. To an extent, the specification of components and spatial organisation of activities may be designed according to the available port capacity and other services. This assessment seeks to consider a maximum design scenario within these alternatives.

1.8.3.18 At a national level, the overall average number of jobs of 1,250 in the Commitment scenario includes construction jobs throughout the three phases of the 12-year construction programme along with a steadily increasing number of operational jobs, which then continue to provide the support required over the subsequent period covering the 35-year lifetime of each Project phase.

1.8.3.19 In the “Commitment” scenario, within the overall average of 1,250, the number of construction jobs averages 805 and reaches a peak of 1,490 in the middle of each phase, though this is likely to be smoothed out in practice as implementation plans are refined. The number of operational jobs is zero until the first WTG becomes operational (in year 4) and rises to and remains at 1,065 from year 12 until decommissioning. Over the 12 year construction period the average number of operational jobs is 445. The combined effects of construction and operation have a possible peak, above the 1,250 average, of a level of 2,200 jobs in year 9 when construction is at a peak and there are 710 operational jobs, before any smoothing of the profile.

1.8.3.20 This number of jobs can be compared at national level. The average Project employment of 1,250 jobs makes up 0.05% of the 2,863,000 total employee jobs recorded in Scotland in 2023, implying equally that the number of employees in the Scottish economy is approximately 2,000 times the number in the Project. For comparison, the average Project employment of 1,250 jobs is also equivalent to 0.81% of the 154,000 jobs in the construction sector in Scotland or 0.64% of the 195,000 jobs in the manufacturing sector.

1.8.3.21 Using the IAT comparators, the magnitude of effect for the economy of Scotland (interpreted as the 'local economy') would be **negligible** or **low**, as the overall change in baseline employment levels would be appreciably less than 1%. The magnitude of effect on employment structure would also be **low** as compared to the individual construction and manufacturing employment as the change is less than 5% for each sector.

Magnitude of employment effects: sub-national levels

1.8.3.22 At the regional level where employment markets are represented by local authority areas individually and in groups, the average overall Project employment of 1,250 jobs in the “Commitment” scenario in the regional epi-centre of Aberdeen City and Aberdeenshire (identified as Group 2 in **Table 1.20**) would make up 2.1% of the combined total of employee jobs in the “BCF” sector and 0.46% of the overall total employee jobs. In the coastal area of Highland, which includes the Cromarty Firth likely to see appreciable manufacturing and fabrication activities, the 1,250 jobs would make up 9.0% of employee jobs in the “BCF” sector and 1.1% of the overall total employee jobs. The integers in the top rows (in green) indicate the groupings used for columns aggregating local authorities at the right of the table.

Table 1.20 Total Average annual Project employment compared to national and sub-national levels of employment by sector[1] [2]

Geographical area/Sector	Aberdeenshire	Aberdeen City	Renfrewshire	East Renfrewshire	Glasgow City	North Lanarkshire	Falkirk	City of Edinburgh	Fife	Highland	Perth and Kinross	South Lanarkshire	Midlothian	East Lothian	Angus	Dundee City	Orkney Islands	Group 1: (as identified)	2: North East	3: Central Belt 1 (West to Falkirk)	4:Central Belt 2 (including Cities of Edinburgh and Glasgow)	Scotland (March 2025)
Geographical Groups: Group 1	1	1	1	1	1	1	1	1	1	1	1	1						**1**				
Group 2: North East	2	2																	**2**			
Group 3: Central Belt 1 (West to Falkirk)			3	3	3	3	3													**3**		
Group 4:Central Belt 2 (including Cities of Edinburgh and Glasgow)			4	4	4	4	4	4	4		4	4									**4**	
Total - Employee jobs (2023)	**100,000**	**159,000**	**84,000**	**21,000**	**441,000**	**131,000**	**72,000**	**367,000**	**132,000**	**113,000**	**63,000**	**117,000**	**33,000**	**32,000**	**34,000**	**79,000**	**11,000**	**1,800,000**	**259,000**	**749,000**	**1,428,000**	**2,863,000**
Selected sectors ...																						
B : Mining and quarrying	3,000	20,000	0	10	15	100	40	50	200	400	30	100	30	20	75	0	75	23,945	23,000	165	545	21,000
C : Manufacturing	**13,000**	**8,000**	**9,000**	**600**	**20,000**	**12,000**	**8,000**	**10,000**	**13,000**	**6,000**	**5,000**	**10,000**	**2,500**	**2,000**	**4,500**	**3,500**	**500**	**114,600**	**21,000**	**49,600**	**87,600**	**195,000**
F : Construction	**7,000**	**6,000**	**4,500**	**1,500**	**17,000**	**15,000**	**4,000**	**9,000**	**6,000**	**7,000**	**4,000**	**9,000**	**3,000**	**2,000**	**2,000**	**3,500**	**700**	**90,000**	**13,000**	**42,000**	**70,000**	**154,000**
G : Wholesale and retail trade; repair of vehicles	15,000	17,000	14,000	3,000	48,000	19,000	9,000	35,000	21,000	16,000	9,000	19,000	6,000	4,500	6,000	11,000	1,500	225,000	32,000	93,000	177,000	355,000
H : Transportation and storage	4,500	8,000	7,000	450	13,000	13,000	4,500	12,000	7,000	6,000	2,250	6,000	800	900	1,250	2,250	1,000	83,700	12,500	37,950	65,200	129,000
M : Professional, scientific and technical activities	11,000	20,000	6,000	1,250	44,000	7,000	2,250	33,000	6,000	6,000	3,500	6,000	3,000	3,000	1,750	3,500	600	146,000	31,000	60,500	109,000	221,000
N : Administrative and support service activities	5,000	12,000	9,000	1,250	49,000	9,000	7,000	23,000	5,000	6,000	2,500	8,000	1,750	1,750	1,500	2,500	300	136,750	17,000	75,250	113,750	188,000
Sum of selected sectors	58,500	91,000	49,500	8,060	191,015	75,100	34,790	122,050	58,200	47,400	26,280	58,100	17,080	14,170	17,075	26,250	4,675	819,995	149,500	358,465	623,095	1,263,000
Sum of selected sectors, excluding G	43,500	74,000	35,500	5,060	143,015	56,100	25,790	87,050	37,200	31,400	17,280	39,100	11,080	9,670	11,075	15,250	3,175	594,995	117,500	265,465	446,095	908,000
B+C+F	23,000	34,000	13,500	2,110	37,015	27,100	12,040	19,050	19,200	13,400	9,030	19,100	5,530	4,020	6,575	7,000	1,275	228,545	57,000	91,765	158,145	370,000
C+F	20,000	14,000	13,500	2,100	37,000	27,000	12,000	19,000	19,000	13,000	9,000	19,000	5,500	4,000	6,500	7,000	1,200	204,600	34,000	91,600	157,600	349,000
Project employment as a percentage, for 1,250 additional jobs																						

[1] ONS. NOMIS
[2] The figures for Scotland are from 2025 , while local authority and Group data is from 2023. This is not considered to introduce material discrepancies.

Geographical area/Sector	Aberdeenshire	Aberdeen City	Renfrewshire	East Renfrewshire	Glasgow City	North Lanarkshire	Falkirk	City of Edinburgh	Fife	Highland	Perth and Kinross	South Lanarkshire	Midlothian	East Lothian	Angus	Dundee City	Orkney Islands	Group 1: (as identified)	2: North East	3: Central Belt 1 (West to Falkirk)	4:Central Belt 2 (including Cities of Edinburgh and Glasgow)	Scotland (March 2025)
Percentage of Total - Employee jobs (2023)	**1.3%**	**0.8%**	**1.5%**	**6.0%**	**0.3%**	**1.0%**	**1.7%**	**0.3%**	**0.9%**	**1.1%**	**2.0%**	**1.1%**	**3.8%**	**3.9%**	**3.7%**	**1.6%**	**11.4%**	**0.07%**	**0.48%**	**0.17%**	**0.09%**	**0.04%**
Selected sectors ...																						
B : Mining and quarrying	**42%**	**6%**	***>100 %***	***>100 %***	***>100%***	***>100%***	***>100 %***	***>100%***	***>100%***	***>100%***	***>100 %***	***>100%***	***>100 %***	***>100 %***	***>100 %***	***>100 %***	***>100%***	**5.22%**	**5.43%**	***>100%***	***>100%***	**5.71%**
C : Manufacturing	**10%**	**16%**	**14%**	**208%**	**6%**	**10%**	**16%**	**13%**	**10%**	**21%**	**25%**	**13%**	**50%**	**63%**	**28%**	**36%**	**>100%**	**1.09%**	**5.95%**	**2.52%**	**1.43%**	**0.64%**
F : Construction	18%	21%	28%	83%	7%	8%	31%	14%	21%	18%	31%	14%	42%	63%	63%	36%	**>100%**	1.39%	9.62%	2.98%	1.79%	0.81%
G : Wholesale and retail trade; repair of vehicles	8%	7%	9%	42%	3%	7%	14%	4%	6%	8%	14%	7%	21%	28%	21%	11%	83%	0.56%	3.91%	1.34%	0.71%	0.35%
H : Transportation and storage	28%	16%	18%	278%	10%	10%	28%	10%	18%	21%	56%	21%	156%	139%	100%	56%	>100%	1.49%	10.00%	3.29%	1.92%	0.97%
M : Professional, scientific and technical activities	11%	6%	21%	100%	3%	18%	56%	4%	21%	21%	36%	21%	42%	42%	71%	36%	>100%	0.86%	4.03%	2.07%	1.15%	0.57%
N : Administrative and support service activities	25%	10%	14%	100%	3%	14%	18%	5%	25%	21%	50%	16%	71%	71%	83%	50%	>100%	0.91%	7.35%	1.66%	1.10%	0.66%
Sum of selected sectors	2.1%	1.4%	2.5%	15.5%	0.7%	1.7%	3.6%	1.0%	2.1%	2.6%	4.8%	2.2%	7.3%	8.8%	7.3%	4.8%	26.7%	0.2%	0.8%	0.3%	0.2%	0.1%
Sum of selected sectors, excluding G	2.9%	1.7%	3.5%	24.7%	0.9%	2.2%	4.8%	1.4%	3.4%	4.0%	7.2%	3.2%	11.3%	12.9%	11.3%	8.2%	39.4%	0.2%	1.1%	0.5%	0.3%	0.1%
B+C+F	5.4%	3.7%	9.3%	59.2%	3.4%	4.6%	10.4%	6.6%	6.5%	9.3%	13.8%	6.5%	22.6%	31.1%	19.0%	17.9%	98.0%	0.5%	2.2%	1.4%	0.8%	0.3%
C+F	6.3%	8.9%	9.3%	59.5%	3.4%	4.6%	10.4%	6.6%	6.6%	9.6%	13.9%	6.6%	22.7%	31.3%	19.2%	17.9%	104.2 %	0.6%	3.7%	1.4%	0.8%	0.4%

1.8.3.23 More generally, these percentages provide a broad indication of the overall level of change that the Project may cause and also provide an indication of the sensitivity of markets at the national and local authority level to a level of change of the order of 1,250 jobs. The more detailed consideration of ward level data later shows that a significant proportion of people travel over 20km in wards such as Methil and Ardersier which have differences but are similar in being away from the main conurbations in Scotland. The travel to work data also indicate that local authorities are a reasonable proxy for local economies where people live and work, confirming assessments made in terms of these geographic areas.

Project employment effects: manufacturing

1.8.3.24 The representation developed from the SCDS for employment effects over the Project timescale indicates that, of the overall total of 1,250 jobs representing Project employment, approximately 805 (65%) jobs are in manufacturing, fabrication and installation with 510 (41%) at or near a port and 295 (24%) in the wider supply chain across Scotland. The remaining 445 (35%) is the average level of operational jobs that arises during the 12 year construction stage.

1.8.3.25 The 805 jobs occurring in Scotland would have greatest effect if concentrated regionally. The levels of effect are shown in **Table 1.21** for the same local authorities and sub-national groups using 805 jobs as a reference representing an upper limit on the impact of the manufacturing, fabrication and installation in each. In practice, portside activities in manufacturing fabrication and installation are likely to be the most concentrated and the level of 510 jobs would lead to percentage figures a corresponding one third lower than shown in **Table 1.21** while these effects would also be limited to local authority areas which include suitable ports.

1.8.3.26 In the regional epi-centre of Aberdeen City and Aberdeenshire (Group 2 in **Table 1.21**), where portside and other activities may occur, the upper limit of 805 jobs would make up 1.4% of the total employee jobs in the combined BCF sector and 3.8% of the jobs if comparing with only the Manufacturing sector. If only portside activities occurred, 510 jobs would lead to effects one third lower, 0.9% of total employee jobs and 2.4% of the jobs in the Manufacturing sector. In Highland, the 510 portside jobs would make up 3.8% of total employee jobs and 8.5% of jobs in the Manufacturing sector (both one third below the figures for 805 jobs in **Table 1.21**).

Table 1.21 Average annual Project employment compared to national and sub-national levels of employment by sector[3]

´	Aberdeenshire	Aberdeen City	Renfrewshire	East Renfrewshire	Glasgow City	North Lanarkshire	Falkirk	City of Edinburgh	Fife	Highland	Perth and Kinross	South Lanarkshire	Midlothian	East Lothian	Angus	Dundee City	Orkney Islands	Group 1: (as identified)	2: North East	3: Central Belt 1 (West to Falkirk)	4:Central Belt 2 (inc Cities of	Scotland (March 2025)
Project employment as a percentage for	**805**	**additional jobs**																				
Total - Employee jobs (2023)	**0.8%**	**0.5 %**	**1.0 %**	**3.8 %**	**0.2 %**	**0.6 %**	**1.1 %**	**0.2 %**	**0.6 %**	**0.7 %**	**1.3 %**	**0.7 %**	**2.4 %**	**2.5 %**	**2.4 %**	**1.0 %**	**7.3 %**	**0.04%**	**0.31%**	**0.11%**	**0.06%**	**0.03%**
Selected sectors …																						
B : Mining and quarrying	27%	4%	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	*>100%*	3.36%	3.50%	*>100%*	*>100%*	3.83%
C : Manufacturing	**6%**	**10 %**	**9%**	**134 %**	**4%**	**7%**	**10 %**	**8%**	**6%**	**13 %**	**16 %**	**8%**	**32 %**	**40 %**	**18 %**	**23 %**	*>100%*	**0.70%**	**3.83%**	**1.62%**	**0.92%**	**0.41%**
F : Construction	**12%**	**13 %**	**18%**	**54 %**	**5%**	**5%**	**20 %**	**9%**	**13 %**	**12 %**	**20 %**	**9%**	**27 %**	**40 %**	**40 %**	**23 %**	*>100%*	**0.89%**	**6.19%**	**1.92%**	**1.15%**	**0.52%**
G : Wholesale and retail trade; repair of vehicles	5%	5%	6%	27 %	2%	4%	9%	2%	4%	5%	9%	4%	13 %	18 %	13 %	7%	54 %	0.36%	2.52%	0.87%	0.45%	0.23%
H : Transportation and storage	18%	10 %	12%	179 %	6%	6%	18 %	7%	12 %	13 %	36 %	13 %	101 %	89 %	64 %	36 %	81 %	0.96%	6.44%	2.12%	1.23%	0.62%
M : Professional, scientific and technical activities	7%	4%	13%	64 %	2%	12 %	36 %	2%	13 %	13 %	23 %	13 %	27 %	27 %	46 %	23 %	*>100%*	0.55%	2.60%	1.33%	0.74%	0.36%

[3] Calculated using the same sources as **Table 1.20**.

`	Aberdeenshire	Aberdeen City	Renfrewshire	East Renfrewshire	Glasgow City	North Lanarkshire	Falkirk	City of Edinburgh	Fife	Highland	Perth and Kinross	South Lanarkshire	Midlothian	East Lothian	Angus	Dundee City	Orkney Islands	Group 1: (as identified)	2: North East	3: Central Belt 1 (West to Falkirk)	4:Central Belt 2 (inc Cities of	Scotland (March 2025)
N : Administrative and support service activities	16%	7%	9%	64 %	2%	9%	12 %	4%	16 %	13 %	32 %	10 %	46 %	46 %	54 %	32 %	*>10 0%*	0.5 9%	4.7 4%	1.0 7%	0.7 1%	0.4 3%
Sum of selected sectors	1.4%	0.9 %	1.6 %	10. 0%	0.4 %	1.1 %	2.3 %	0.7 %	1.4 %	1.7 %	3.1 %	1.4 %	4.7 %	5.7 %	4.7 %	3.1 %	17. 2%	0.1 %	0.5 %	0.2 %	0.1 %	0.1 %
Sum of selected sectors, excluding G	1.9%	1.1 %	2.3 %	15. 9%	0.6 %	1.4 %	3.1 %	0.9 %	2.2 %	2.6 %	4.7 %	2.1 %	7.3 %	8.3 %	7.3 %	5.3 %	25. 4%	0.1 %	0.7 %	0.3 %	0.2 %	0.1 %
B+C+F	3.5%	2.4 %	6.0 %	38. 2%	2.2 %	3.0 %	6.7 %	4.2 %	4.2 %	6.0 %	8.9 %	4.2 %	14. 6%	20. 0%	12. 2%	11. 5%	63. 1%	0.4 %	1.4 %	0.9 %	0.5 %	0.2 %
C+F	4.0%	5.8 %	6.0 %	38. 3%	2.2 %	3.0 %	6.7 %	4.2 %	4.2 %	6.2 %	8.9 %	4.2 %	14. 6%	20. 1%	12. 4%	11. 5%	67. 1%	0.4 %	2.4 %	0.9 %	0.5 %	0.2 %

Employment characteristics of ports

1.8.3.27 Depending on its location, capacity and role in the supply chain, a port may experience either or both manufacturing and operational impacts. Manufacturing would amount to an average level of 510 jobs over the construction period with activities at ports according to their capacity and facilities while operational impacts would increase from year 4 to the ongoing level of 1,065 jobs (averaging 445 jobs over the construction period). Work beginning within the 12 year construction period for each of the three 1 GW Project development phases would lead to employment at manufacturing ports followed by a 35 year period of employment reflecting O&M requirements and then employment over a period of decommissioning. Decommissioning works are likely to use some of the same services as for manufacturing and are likely to take place over a period determined by available capacity and costs at ports.

1.8.3.28 In practice, a port is likely to benefit from providing similar services to more than one wind farm developer and evolve to have a greater role in either manufacturing or operations, with operational needs favouring ports nearer to the Project's OAA. For this Project, the geographical context indicates that operational needs are likely to be best served by ports in Aberdeen and Aberdeenshire. These ports may compete with ports such as those further south and in the Cromarty Firth for manufacturing work which depends less than operational work on geographical proximity to final turbine locations. The levels of manufacturing and operational employment are considered below for the ports identified in Table 4.16 of **Chapter 4: Project Description**, which provide construction or O&M services (as identified in **Table 1.22**).

Table 1.22 Characteristics of ports: population sizes and BCF sector employment

Port	Population within 5km	Population within 20km	Factor (*)	Local authority		Ward	
				BCF sector employment	BCF sector employment as % total	BCF sector employment	BCF sector employment as % total
Aberdeen	155,000	279,000	1.8	34,000	21%	1,228	17%
Peterhead	22,000	39,000	1.8	23,000	23%	2,168	30%
Fraserburgh	17,000	34,000	2.0	23,000	23%	2,315	33%
Ardersier	2,000	109,000	54.5	13,400	12%	1,258	18%
Inverness	51,000	105,000	2.1	13,400	12%	960	13%
Invergordon	7,000	41,000	5.9	13,400	12%	1,785	25%
Nigg	1,000	46,000	46.0	13,400	12%	1,660	23%
Leith	221,000	866,000	3.9	19,050	5%	587	8%
Rosyth	46,000	834,000	18.1	19,200	15%	1,272	18%
Grangemouth	31,000	555,000	17.9	12,040	17%	1,594	22%
Burntisland	11,000	860,000	78.2	19,200	15%	1,256	18%
Methil	34,000	198,000	5.8	19,200	15%	1,641	23%
Dundee	131,000	249,000	1.9	7,000	9%	807	11%
Montrose	16,000	70,000	4.4	6,575	19%	1,935	27%
Scapa (Orkney)	-	18,000	0.0	1,275	12%	1,267	18%
Kishorn	132	4,000	30.3	13,400	12%	1,306	18%

(*) A higher Factor indicates a port with a higher proportion of additional population beyond a 5km distance. It is calculated as the ratio of the Population within 20km to the Population within 5km.

1.8.3.29 The ports show appreciable differences in their structure of surrounding populations. The population numbers are based on concentric circles covering geographies of radius 5km and 20km. Nigg and Ardersier, which have very small populations (1,000 and 2,000 people) within 5km have some of the greatest differences in numbers from the surrounding populations within 20km (46,000 and 109,000 people) with a factor (representing the ratio of the 5km and 20km populations) of 46 and 54.5 respectively. Although such ports may initially seem remote, the population in their hinterlands makes them potentially able to provide an appreciable workforce.

1.8.3.30 Burntisland has a larger population within 5km (of 11,000) and also a large population (860,000) within 20km, with a factor of 78.2 (though it includes populations on the other side of the Firth of Forth within the defining circle). For the same reason, Leith has a large population (866,000) within 20km, as well as a much larger local population within 5km (221,000) and a factor of 3.9. For other ports, and depending on the actual population numbers, the lower factors indicate generally lower employment capacity and a potentially lower ability to adjust for change.

1.8.3.31 The indicator used to represent the structure of industry relevant to port activities for offshore wind is employment in the BCF Sector, as this workforce is most comparable to that needed for offshore wind. For ports except Scapa, the number of employees in the BCF sector ranges from 34,000 for Aberdeen to 6,575 in Montrose. As a proportion, the number in the BCF sector makes up a maximum of 23% of employee jobs in Peterhead and Fraserburgh to 9% in Dundee and 5% in Leith. At the more detailed geographic level of the wards surrounding the ports, the proportion ranges from 33% in Fraserburgh to 11% in Dundee and 8% in Leith. For all ports except Aberdeen, the proportion at ward level is a little greater than the proportion shown at local authority level, indicating that ports have a similar but more concentrated version of the industrial structure of the surrounding local authority.

Project employment effects at ports

1.8.3.32 The effect of the Project is shown in **Table 1.23** as a percentage of the Project employment, 510 for portside manufacturing and 1,065 for operations, compared to the estimated employee numbers in the BCF sector within 20km (based on a scaling of BCF employee numbers at local authority level according to total population 20km to total population within the local authority). The magnitude of effects for Scapa and Kishorn are extreme due to their small populations and would be High according to the IAT comparators for total employment and sector employment.

1.8.3.33 Not all ports will be suitable for all Project activities and the estimates of effects made in **Table 1.23** can be interpreted according to activities which are feasible or planned to take place there. The ports and their potential use for Project activities as identified are shown in **Table 1.24** together with the estimated magnitude (IAT) of effects, which would occur for the two employment levels of 510 and 1,065 jobs

Table 1.23 Effects on Ports: Project employment compared with BCF Sector employment

			Project Employment of 510 jobs				Project Employment of 1,065 jobs			
Port	**Total employment within 20km**	**BCF sector employment within 20km**	**As % Total employment**	**Magnitude (IAT)**	**As % BCF sector employment**	**Magnitude (IAT)**	**As % Total employment**	**Magnitude (IAT)**	**As % BCF sector employment**	**Magnitude (IAT)**
Aberdeen	200,511	42,877	0.3%	Low	1%	Low	0.5%	Low	2%	Low
Peterhead	14,826	3,410	3.4%	High	15%	High	7.2%	High	31%	High
Fraserburgh	12,925	2,973	3.9%	High	17%	High	8.2%	High	36%	High
Ardersier	52,222	6,193	1.0%	Low	8%	Medium	2.0%	High	17%	High
Inverness	50,305	5,965	1.0%	Low	9%	Medium	2.1%	High	18%	High
Invergordon	19,643	2,329	2.6%	High	22%	High	5.4%	High	46%	High
Nigg	22,038	2,613	2.3%	High	20%	High	4.8%	High	41%	High
Leith	626,300	32,510	0.1%	Low	2%	Low	0.2%	Low	3%	Low
Rosyth	296,749	43,164	0.2%	Low	1%	Low	0.4%	Low	2%	Low
Grangemouth	251,511	42,058	0.2%	Low	1%	Low	0.4%	Low	3%	Low
Burntisland	306,000	44,509	0.2%	Low	1%	Low	0.3%	Low	2%	Low
Methil	70,451	10,247	0.7%	Low	5%	Low	1.5%	Medium	10%	Medium
Dundee	133,880	11,863	0.4%	Low	4%	Low	0.8%	Low	9%	Medium
Montrose	20,703	4,004	2.5%	High	13%	High	5.1%	High	27%	High
Scapa (Orkney)	8,996	1,043	5.7%	High	49%	High	11.8%	High	102%	High
Kishorn	1,916	227	26.6%	High	224%	High	55.6%	High	469%	High

Table 1.24 Ports: planned Project activities and magnitude of effects

	Activities		Construction/fabrication					Integration of Floaters / floating units / WTGs	Marshalling	Construction Activity	Maintenance		Decommissioning
Port	**Magnitude (IAT) / 510 jobs**	**Magnitude (IAT) / 1,065 jobs**	**Station keeping system**	**Array cables**	**Floating units, Concrete semi-submersible**	**Floating units, Steel semi / tension leg platform. Assembly of steel components**	**Subsea substations / power collectors**		**WTG / floating unit components to be marshalled near to integration port**	**Station keeping system**	**General O&M for supply service operation vessel (SOV) / crew change**	**Major component replacement**	
Aberdeen	Low	Low											
Peterhead	High	High											
Fraserburgh	High	High											
Ardersier	Medium	High											
Inverness	Medium	High											
Invergordon	High	High											
Nigg	High	High											
Leith	Low	Low											
Rosyth	Low	Low											
Grangemouth	Low	Low											
Burntisland	Low	Low											
Methil	Low	Medium											
Dundee	Low	Medium											
Montrose	High	High											
Scapa (Orkney)	High	High											
Kishorn	High	High											

1.8.3.34 The Project's operational employment of 1,065 jobs would cause effects meeting the IAT criterion of High at six of the seven ports where maintenance activities for "General O&M for supply SOV / crew change" are planned to potentially occur (see Section 4.11 in **Chapter 4: Project Description**), with only Aberdeen experiencing Low effects. A possible strategy is to design these activities to contribute to employment at more than one port. If effects were to be distributed, they could be at a level between Medium and High at Peterhead and Fraserburgh (below 10% of BCF sector employment sector) and between Negligible to Low in Aberdeen (below 1%). Other balanced approaches to deployment which include the selective use of Aberdeen would provide a range of options to use some or all ports according to their capacity and meet concerns at each port regarding beneficial levels of employment.

1.8.3.35 The other maintenance activity ("Major component replacement") is planned at six ports, three of which would experience High effects (Ardersier, Invergordon and Nigg) and three would experience Low effects (Aberdeen, Leith and Burntisland). This variety permits a similar plan to distribute activities between ports and allow effects to be matched to beneficial levels of employment .

1.8.3.36 There are eight categories of activities related to construction, marshalling and integration at portside identified in **Table 1.24**. In each of seven categories there are one or more ports where effects are Low when compared with Project employment of 510 jobs and this allows a balanced approach to deployment across ports and activities including consideration of beneficial levels of employment. The category where effects are Medium or High (dependent on the port) is construction of "Floating units, Concrete semi-submersible" where only three potential ports are identified. Although this indicates a specific need for employment for this task in these ports, in practice the 510 portside manufacturing workforce will not all undertake this task, and if fewer than 230 employees are needed, the effects at either of two of the three ports would be identified as Medium. At the third potential port, Kishorn, there is a very small existing workforce and effects would remain High without specific action to enable a supply of labour. Overall, the flexibility in capacity available at ports which are practicable for Project activities and can meet Project workforce requirements indicates that the Project can offer long term stable employment and can also make use of ports with larger surrounding workforces.

Project employment effects: decommissioning

1.8.3.37 Although not already considered in the assessment above, decommissioning activities can be considered in a similar way. Decommissioning may be considered a version of construction "in reverse" although typically has a lower level of employment and can be conducted over a longer timescale according to the availability of decommissioning resources. Decommissioning alternatives include use of ports where the magnitude of effects for final assembly and operational are expected to be **low** and the overall magnitude of effects of decommissioning are similarly expected to be **low**.

1.9 Assessment of effects: construction stage

1.9.1 Introduction

1.9.1.1 This Section provides a targeted assessment of the effects during the construction stage of the Project taking into account the sensitivity of receptors and magnitudes of effects . It draws on **Section 1.8.3** which provides a more general description of employment effects throughout the Project and on **Section 1.8**, which sets out the assessment methodology

1.9.2 Effects from Project demand for labour

Overview

1.9.2.1 The market context for the Project is described in **Section 1.6.1.** The Project generates demand for labour at locations where activities in the supply chain take place. The considerations in **Section 1.8.3** indicate that the overall Project demand for labour of 1,250 jobs would make up 0.05% of the people identified as employees in Scotland, which would be an effect assessed as **Very Low** or **Negligible** effect according to IAT criterion in **Section 1.8.3**.

1.9.2.2 Of this total, 805 jobs result from manufacturing and fabrication of components and installation activities with these taking place at coastal portside locations and in the wider supply chain. An upper limit is for all these jobs to be concentrated in one local authority area in a coastal location. **Table 1.21** compares these 805 jobs with current employment levels in a range of local authority areas, individually and in four groups.

1.9.2.3 In Aberdeen, Aberdeenshire, and Highland which include key ports, the effect of 805 jobs is assessed as **low** according to IAT criterion for overall employment levels because changes are below 1% of current employment. In areas surrounding ports to the south, effects are **high** and **medium** in Angus and Dundee City respectively, while further to the south, near the Firth of Forth effects are **medium** for Perth and Kinross and Falkirk and are **low** for Fife and Edinburgh (including Leith). A very similar pattern is seen when using IAT criterion for employment structure for the BCF sector, with the only difference being that effects for Dundee City are **high**.

1.9.2.4 In other areas identified in **Table 1.21** the higher levels of effects are primarily due to a smaller population and/or lower levels of employment in the BCF sector (such as in East Lothian) while the lower levels of effects occur when there is a relatively larger population and industrial base (such as in Glasgow). They illustrate the contexts of different areas in Scotland and the contrast with the more northerly industrial and port capacity nearer the operating area of the Project.

1.9.2.5 Across the eleven local authority areas with 5,000 or more manufacturing employees, none reach the IAT criterion for High for the effects on the BCF Sector. These eleven local authority areas fall collectively within Group 1[4] for which the magnitude of change for this group is 0.4% which is **very low**. Considering just the two local authority areas in the North East (Aberdeen and Aberdeenshire (collectively comprising Group 2), the magnitude of change is 1.4% which is **low**.

1.9.2.6 The effects from the 510 portside jobs for manufacturing, fabrication and installation are assessed as between **low** and **high** when considered for individual ports alone but a balanced distribution of activities across more than one port is possible and overall will result in effects assessed as **medium** (see **Section 1.8.3**).

1.9.2.7 The Project generates demand in markets for manufacturing, fabrication and port services related to installation. There is unlikely to be any workforce capacity constraint in the manufacturing sector at national level as the Project is small in comparison. The ongoing level of Project employment is 805 people in manufacturing, fabrication and installation with 510 working portside. After year four, when the first turbines become operational, 445 jobs for O&M on average over the construction period, will have effects similar to the 510 jobs for manufacturing, fabrication and installation depending on the port used. With the size of the BCF sector and options for use of ports, and assuming distribution of Project activities, sufficient capacity is likely to be available and the Project is unlikely to generate inflationary

[4] Group 1 also includes East Renfrewshire with 600 manufacturing employees.

pressure on wages or have other influence that would lead to adverse effects on other users of existing employment markets.

Sensitivity of receptor

1.9.2.8 The sensitivity of the employment markets potentially affected is considered to be **medium**, primarily because of the potential for concentrated effects at particular ports though this is offset by the overall levels of capacity and substitutability in markets in Scotland and because suppliers of either manufacturing, fabrication or port services are unlikely to have appreciable dependency on single contracts even of the size of the Project.

Magnitude of impact

1.9.2.9 The magnitude of change is greater when Project activities are concentrated within a geographic area but are of a level that is typically **low** when an upper limit representing the concentration of Project workforce (805 people) is compared with employment levels in local authority areas. At a more local level, the magnitude of change at some individual ports is high when compared with a similar upper limit for portside activities (510 in construction and 445 for operation) but may be managed to enhance positive effects and avoid adverse effects through consideration of socio-economic conditions at ports.

1.9.2.10 In practice, the assessment indicates that the Project can implement a design for portside and non-portside activities with effects which are beneficial and medium in magnitude with the possibility to refine the Project design to result in effects of low magnitude in line with specific requirements. The overall magnitude is assessed as **low**.

Significance of residual effect

1.9.2.11 Considering the potential and incentives for the Project design to be aligned with well-functioning markets, it is predicted that the sensitivity of the receptor is **low**, and the magnitude is **low**. The effect is **Minor Beneficial** (**Not Significant**) in EIA terms.

1.9.3 Effects from supply of labour to meet Project demand

Overview

1.9.3.1 The Project generates demand for labour at locations where activities in the supply chain take place and may provide employment for people already in work or seeking new opportunities. In particular, a reduction is expected in the scale of activity in the oil and gas industry and in north east Scotland which would release capacity to employment and services markets as part of the overall transition to more sustainable offshore industries.

1.9.3.2 A common metric to indicate the functioning of the labour market is the number of unemployed people as it provides an indicator of the balance between demand and supply. The Project generates additional demand for labour of 1,250 and this can be compared with a notional excess supply of labour as recorded as claimant counts. In August 2025, claimant counts were 8,400 people in Aberdeen City and Aberdeenshire and 3,095 in Highland, though greater elsewhere with 21,950 in Glasgow City (ONS, 2025f).

1.9.3.3 The 805 manufacturing, fabrication and installation Project jobs which may occur within the Group 1 local authorities would make up 1.3% of the claimant count of 58,935 people. For this geography, the effect of the Project is assessed as of **low** magnitude against the IAT criterion for unemployment. For the geography of Aberdeen City and Aberdeenshire, 805 jobs would make up 9.5% of the claimant count, while the 510 portside jobs in manufacturing

or 445 jobs in O&M would make up 6.1% or 5.3% respectively, falling within IAT criterion of **medium**. In Highland, the 805 jobs would meet a criterion of **high**, as would 510 portside jobs.

1.9.3.4 These comparisons highlight that the effect of the Project will be enhanced if it also contributes to objectives within more localised geographies such as for a local authority, supplier or industry cluster. These jobs estimates are upper limits and are likely to be more dispersed, which would in practice reduce the level of effect in one locality.

Sensitivity of receptor

1.9.3.5 Potential workers are generally sensitive to job opportunities and may also seek them out unless employment markets are also offering many other opportunities. As a default, the sensitivity of the receptor is considered **high**.

Magnitude of impact

1.9.3.6 The magnitude of the impacts from the number of opportunities provided by the Project is low when compared with IAT criterion for unemployment for the Group 1 local authority areas.

1.9.3.7 However, the Project may explicitly seek to increase beneficial impacts by targeting areas where there are more potential workers. Furthermore, the Project will contribute to long term demand for employment, which is likely to endure for a reasonable period, reflecting the 12-year construction programme and is in growing industry with a long-term future known for technical training and skills. As such, the associated jobs are likely to be considered 'good jobs' with a type of impact that is particularly appreciated. Manufacturing jobs at ports are likely to be similarly viewed favourably by potential workers in the areas local to the ports with a potentially limited range of other opportunities. Overall, the magnitude of impact is assessed as **medium**.

Significance of residual effect

1.9.3.8 The basic considerations lead to a prediction that the sensitivity of the receptor is **high** and the magnitude of impact is **medium**. Considering the level and quality of jobs and careers offered and potential for concentration to increase beneficial effects, the effect is assessed as **Major Beneficial** (**Significant**) in EIA terms.

1.9.4 Effects from Project demand for products and services

Overview

1.9.4.1 A general summary of the market context is provided in **Section 1.6.1** and this indicates that the Project can draw on wide established and growing markets to build a supply chain. These include international markets for specialised components, some with planned production facilities in Scotland, as well as more localised markets, such as for services requiring port facilities and already used by the oil and gas industry.

1.9.4.2 Compared to the scale and reach of the existing and potential new globalised markets for specialised components, the effect of Project demand is ultimately expected to be **low** as it will take up only a limited proportion of the output from a major supplier which is seeking to serve many wind farm developers in Scotland and overseas. However, in markets for more localised products and services, the Project demand may make up an appreciable proportion of capacity, such as for port and lay-down capacity, particularly as the Project is large development compared to other wind farms and this may have effects which are **high**.

In addition, despite predicted growth overall, the market for some specialised wind farm components is expected to experience lack of capacity in supply.

Sensitivity of receptor

1.9.4.3 The sensitivity of the product and services markets potentially affected is generally considered to be **low** for the established markets serving operators in the North Sea. Businesses in Scotland seeking to develop capability to serve a global market for wind farm products and services and other global markets may be sensitive to Project demand which can help underwrite investment opportunities, but as other developers can also provide this, sensitivity is considered **medium**.

1.9.4.4 Capacity at ports and for services that depend on them is effectively limited and while the assessment above identifies the scope for alternative use of individual ports to minimise impacts there is a potential risk that some port services are fully utilised and of inflationary pressure from competition. Because of the importance of capacity in relation to port services and the supply constraints for specialised components, the receptor is considered as of **medium** sensitivity.

Magnitude of impact

1.9.4.5 The magnitude of the impacts on product and services markets is generally considered to be beneficial but **low** compared to the size of existing markets for the required components and activities. The demands the Project will make for localised services such as port facilities may however be large compared to the level of activities currently undertaken in any one individual port and both support the long term future of port infrastructure and lead to short term constraints with inflationary pressure. As there is some potential for local mitigation through use of multiple ports, the overall magnitude is considered **medium**.

Significance of residual effect

1.9.4.6 Considering the need for port capacity and the potential for the Project to provide confidence for investment in the sector, it is predicted that the sensitivity of the receptor is **medium**, and the magnitude of impact is **medium** with effects that are **Moderate** (**Potentially Significant**). This conservative assessment is offset by the existence of potential constraints reducing the level of benefit and the effect is assessed overall as of **Moderate Beneficial Significance** but **Not Significant** in EIA terms.

1.9.5 Effects from supply of products and services

Overview

1.9.5.1 The Project requires a wide diversity of products and services from an extended supply chain which includes activities which are locationally specific and others that have greater flexibility in implementation such as through use of transport between manufacturing sites or services delivered remotely.

1.9.5.2 The Project is adopting policies for using supply chains and suppliers in Scotland as this can provide cost, local employment, and other benefits from factors such as geographical proximity and familiarity with the local context. The Project has also made commitments through the SCDS as part of existing government agreements to support business and suppliers in Scotland.

1.9.5.3 In addition, the **SEAP** for the Project has set recommendations intended to assist the Applicant in achieving the Project objectives, which includes supporting and securing the development of the Scottish supply chain.

1.9.5.4 The considerations in **Section 1.8.3** of proportionate effects on employment are similarly representative of the levels of value added (GVA) generated by the Project and would be generated through suppliers of products and services to the Project. As such the impacts on suppliers are aligned with employment effects.

1.9.5.5 The principal differences are that while workers may be flexible in their location, suppliers are more likely to have fixed plant and equipment to serve a market that extends around existing operational facilities. Although potential suppliers are likely to be sensitive to new opportunities, particularly for new and large contracts, they may balance this against the need to service an existing customer base, such as in the oil and gas sector, and the structural and other customised needs often associated with large contracts.

Sensitivity of receptor

1.9.5.6 There is a wide diversity of products are services required and potential suppliers are all expected to be sensitive to contract opportunities but are likely to have an existing customer base and criteria for selecting preferred contract counterparties. The sensitivity of suppliers as a receptor is considered **medium**.

Magnitude of impact

1.9.5.7 Although the Project may distribute work across local authority areas, a contract will be selected with an individual supplier and then is likely to have an appreciable impact both on the supplier and the local area in which they operate. The magnitude of the employment impacts of the Project is **high** when compared to IAT criterion for some local authority areas (See **Section 1.8.3**) and although not all this impact would occur at one supplier in one local authority area, the effect would be concentrated on the local area and is considered overall to be **high**.

Significance of residual effect

1.9.5.8 These considerations lead to a prediction that the sensitivity of the receptor (existing suppliers) is **medium** and the magnitude of impact is **high** with effects that are **Major Beneficial** (**Significant**) in EIA terms.

1.9.6 Effects from economic activity (GVA) within the local and wider economies

Overview

1.9.6.1 The Project will generate additional economic activity from expenditure along with increased employment. The GVA in an economy can be seen as the difference between revenues and costs for firms. Firms vary in their use of resources and labour but on average approximately 60% of GVA is made up of “compensation of employees”, which includes salaries and costs to employers such as national insurance (ONS, 2025b). As such, the proportionate effects on employment are a close proxy for the effects on GVA.

1.9.6.2 There is a wide range in the estimates published in relation to projections of GVA in the clean energy and offshore wind sector. On a per FTE basis, a recent industry report for Scottish Renewables (2025) identifies that 41,500 FTE jobs in the offshore wind sector

would lead to GVA of £1.4bn in 2032 at the expected peak of construction, giving a ratio of £33,810/FTE (in 2025 prices). Alternatively, the Department for Energy Security and Net Zero (DESNZ) has estimated an average value of GVA for offshore wind of £103,000/FTE (in 2025 prices, DESNZ, 2025). Estimates depend on assumptions over activities undertaken in Scotland, the composition of skills requirements and salary levels. Estimates based on the construction expenditure in the SCDS for the Project are approximately £140,000/FTE but, given potential uncertainties, the lower average calculated by DESNZ has been used by the Applicant to reflect a more conservative approach.

1.9.6.3 The GVA from operations is related to more specific activities with greater certainty and has a greater proportion of expenditure related to employment. An estimate of £93,000/FTE is used which is calculated from the SCDS and industry estimates from the Applicant.

1.9.6.4 The level of GVA in Scotland generated by the Project calculated using the SCDS values and related employment projections is an average of £121.2m annually over the construction period and continues at £99.0m annually during the operational period.

1.9.6.5 The effects from these monetary flows are reflected in the economic context in multiple ways, from local spending to greater local tax receipts and greater activity supporting local businesses.

Sensitivity of receptor

1.9.6.6 Offshore wind development requires suppliers across sectors including the heavy engineering sector, information technology, and marine services. The Project may therefore interact with a variety of different local economic contexts influenced by a wide range of factors such as industrial legacies and current sector clusters.

1.9.6.7 At a national and local authority level, the economy is likely not to be sensitive to an individual energy sector contract but within a local area the effects on an employer in the supply chain and on the connections to the surrounding local economy may be appreciable. The sensitivity to the different potential types of Project activities will reflect the local economic and industrial context of different ports and their characteristics (see **Table 1.14**). The same increase in GVA will have a greater effect in a smaller more remote port than in a large port such as Leith or Aberdeen. As there are a range of types of port, the sensitivity is assessed as **medium** to reflect an overall average from distribution of project activities.

Magnitude of impact

1.9.6.8 The magnitude of the economic effects is related both to the contracting structure used by the Project and the associated levels of employment. In general, economic effects will be concentrated around the locations of Project and supplier activities. The type of Project contract as well as the size will be important with the potential for long term commercial relationships to contribute to outcomes such as local economic stability. The magnitude is assessed as **medium** based on the quantitative estimates and the expectation of mix of contract sizes and distribution between locations.

Significance of residual effect

1.9.6.9 Considering the limited contribution of the Project to the national economy but the potential for appreciable contribution locally, it is predicted that the sensitivity of the receptor is **medium**, and the magnitude is **medium**. The effect is of **Moderate Beneficial** (**Potentially Significant**) is assessed as **Significant** in EIA terms as the approach to Project design can include a specific focus on enhancing benefits.

1.9.7 Impact from increase in population

Overview

1.9.7.1 The Project generates demand for labour at locations where activities in the supply chain take place. The effect on population levels is primarily related to the required levels of employment, the incentives arising from Project contracting, and the responses from people locally and from outside the area.

1.9.7.2 The receptors are people and communities living and working in the area of the Project who will experience the effects described under other headings above. Any increase in population due to the Project is likely to most depend on whether the new labour demand is met from the population within the area. Some ports such as Dundee have low activity rates in the neighbouring wards and an increase in activity rates would increase labour supply without the need for an increase in population.

1.9.7.3 The overall population projection for Scotland to 2032 is for 4.4% growth with Dundee City close to this (4.1%) but appreciable variations between other local authority areas such as Aberdeen City (4.8%), Aberdeenshire (4.1%), Highland (2.2%) and City of Edinburgh (9.6%, NRS, 2025b). In Highland, the projected growth and the past growth (from 2011 and 2022) are both half the Scottish average and while plans for the Inverness and Cromarty Firth Green Freeport consulted on in 2024 anticipate a doubling in the annual provision of housing, this will likely lead to greater alignment with national growth rates rather than a sudden change and is accompanied by a projected increase 11,000 in jobs across Highland, predominantly in the Inner Moray Firth(Highland Council, 2024).

1.9.7.4 Overall, the variation in projected population growth between local authorities is likely to result in differences greater than those introduced by the Project, particularly if Project effects are distributed across a number of ports and local authorities.

1.9.7.5 Ports with higher activity rates may have fewer workers potentially available to the Project but all except Scapa and Kishorn have appreciably sized populations within 20km with established communities and commuting patterns where population increases due to the Project may be absorbed as part of changes seen as normal in the areas.

Sensitivity of receptor

1.9.7.6 The sensitivity to population change of people and communities living and working in areas affected by the Project is considered to be **low** due to established expectations of population growth, change and existence of sizeable populations near portside manufacturing locations.

Magnitude of impact

1.9.7.7 Construction activities may have a greater impact on population change in smaller local areas where work is concentrated. Overall however, the impact magnitude is considered **low** because the increase in employment is small relative to the size of the local job markets (see **Table 1.21**) and impacts would be spread across multiple ports, supply chains and local communities.

Significance of residual effect

1.9.7.8 Considering the changes that may result from Project employment and the related levels of potential increases in population, it is predicted that the sensitivity of the receptor is **low**, and the magnitude is **low**. With the additional interpretation that a Project-driven population

increase is less preferable than a workforce from the existing population, the effect is of **Minor Adverse** (**Not Significant**) in EIA terms.

1.9.8 Effects from Project transport and access requirements

Overview

1.9.8.1 The socio-economic receptors are people and communities travelling and accessing land and amenities within the area of the Project.

1.9.8.2 Traffic and transport effects have the potential to cause indirect socio-economic effects but the assessment in **Chapter 26: Traffic and Transport** confirms that there are no expected causes which would cause disruption or other effects leading to social or economic losses. In particular the assessment does not identify any residual significant effects and identifies only minor adverse effects affecting severance, road driver delay, Non-Motorised User (NMU) amenity, and road safety, noting that:

- The construction traffic does not affect the capacity of the network for other users, or for walkers, cyclists seeking to cross roads, primarily because traffic levels are low.
- While rare effects occur, they are short term and temporary, such as moving horizontal directional drilling (HDD) equipment along the route to work on the next crossing.
- Uses will not experience severance because an alternative route will be available at all times and traffic management schemes are implemented. In addition, levels of use on routes using these crossings are generally very low.

1.9.8.3 The impact of marine transport on these (onshore) socio-economic receptors while possibly occurring in principle is considered **negligible** in practice.

Sensitivity of receptor

1.9.8.4 The sensitivity of people and communities to indirect effects from traffic and transport is considered to be **high** by default as a transport network supports multiple socio-economic activities.

Magnitude of impact

1.9.8.5 The magnitude of indirect socio-economic impacts from effects arising on the onshore transport network is considered **very low** primarily because the network can be managed to maintain its essential functions for people and communities at all times.

Significance of residual effect

1.9.8.6 Considering the assessments of traffic and transport overall, it is predicted that the sensitivity of the receptor is **high**, and the magnitude is **very low**. There are minimal levels of change for users overall and the effect is of **Minor Adverse** (**Not Significant**) in EIA terms.

1.9.9 Effects from use of land and marine areas

Overview

1.9.9.1 The socio-economic impacts from use of land and marine areas by the Project result from changes caused in their current and potential future uses.

1.9.9.2 The main onshore effect is from long term loss of production and jobs from the reduction in agricultural land and forestry due to the land requirements for the onshore substation. In addition there is the potential for similar loss of production and jobs from temporary use of land for Project activities along the onshore cable corridor. The agricultural land that is affected is Class 3.2, which is typically improved grassland and has average production levels (See **Chapter 22: Land Use**). The Project will avoid disturbance to commercial forest plantations and other identified woodland habitat by using trenchless crossings (e.g. HDD).

1.9.9.3 In relation to trenchless crossings, HDD has been presented in the EIA. Whilst other trenchless methods are available, HDD is presented herein as it is likely to have the largest construction footprint. There are no safeguarded areas for resources that would become inaccessible due to the Project nor is the land subject to other alternative planned use.

1.9.9.4 The Project will result in the permanent loss of 56ha of agricultural land. The value of Grade 3 land at average market prices for Scotland (£5,600/acre) (Savills, 2024) is approximately £768,000, reflecting expected future profits and equivalent to a loss in economic value. This area is equivalent to approximately two thirds of a typical UK lowland livestock farm (DEFRA, 2025a)[5]. The loss in agricultural area can be considered to lead to pro-rata effects on employment and a corresponding reduction of between one and two jobs.

1.9.9.5 During construction, 114ha of land will be used for construction of the onshore cable corridor (See **Chapter 19: Ground Conditions and Contamination**). As this is temporarily unavailable for agriculture, a valuation is made assuming the land was rented at a market rate of £200/ha (DEFRA, 2025b)[6]. The main uncertainty is the period when the land is out of production. An upper limit would reflect a Project onshore construction period of nine years but common practice would be to reinstate after construction as soon as possible with land out of production for a shorter period which is assumed here to be three years. This gives a corresponding range in financial value of between £68,000 and £205,000.

1.9.9.6 Commercial fishing is currently undertaken in an area overlapping with the OAA and the offshore export cable corridor and effects on catches have potential economic and social consequences on fishing communities. The data available for the value of catches reflects a geographical grid used for government reporting with cell sizes appreciably greater than the area used by the Project. Assuming that catch value scales with the 20.4% of the area of the reporting cell 45E9 which overlaps with the OAA, the calculated loss would amount to £1.6m a year. This is likely to be fully or partially compensated by fishing activity conducted elsewhere (displaced) and so is an upper limit for the potential loss (See **Chapter 14 Commercial Fisheries**). A quantification of the level of displacement is not available but the upper limit for the loss would lead to a reduction in GVA of £0.6m (ONS, 2025e) associated with this £1.6m which is a similar to an estimate by Scottish Government of a GVA effect of £0.435m, along with an associated loss of direct and indirect employment of 2.9 FTE (Scottish Government, 2025a). In comparison, the value of Scottish catches in 2024 was £756m, with the fishing fleet at Peterhead making up 43% (£324m) (Fishing News, 2025).

1.9.9.7 Impacts to commercial fisheries are considered in detail in **Chapter 14 Commercial Fisheries.** The Applicant is proposing a package of commitments and mitigation that will be delivered through the **Fisheries Mitigation, Monitoring and Communication Plan** (FMMCP) including both embedded commitments and additional mitigation where significant adverse effects have been identified.

1.9.9.8 Additional mitigation measures have been developed to address the reduction in access to, or exclusion from established fishing grounds within the OAA. They collectively aim to reduce or offset predicted adverse effects and promote opportunities for coexistence.

[5] Statistics for Scotland are not available in an equivalent accessible form (e.g. from RESAS Agricultural Statistics Hub).
[6] Statistics for Scotland are not available in an equivalent accessible form.

1.9.9.9 **Table 1.25** defines these additional measures and explains their specific role in addressing the impact where they have relevance to socio-economics.

Table 1.25 Relevant socio-economics embedded environmental measures

ID	Environmental measure proposed	Relevance to socio-economics assessment
M-219	Fisheries Fund: A Fisheries Fund shall be established for the array area (within the OAA) once determined, operating during the construction stage and extending through the first five years of operation. The Fund shall be directed towards fisheries where moderate adverse effects are identified within the EIA Report. The Fisheries Fund shall not provide direct compensation to individual businesses. Instead, it shall support the fishing sector more broadly by funding research and initiatives that promote co-existence, adaptation, and resilience. Priority areas of support shall include: • Research and enhancement of target fish and shellfish stocks to strengthen ecological resilience and sustainability for example, Nephrops, monkfish and haddock. • Co-designed initiatives such as gear innovation, diversification, operational adaptation, and business resilience. • Collaborative, evidence-based investment to improve the long-term viability of fisheries. Commitment is made to consult with the fishing industry and the scientific community to define administrative arrangements, identify research priorities, and ensure transparent governance.	Enhancement of fish and shellfish stocks supports commercial fishing displaced from the OAA and helps maintain levels of catches and associated economic activity.

1.9.9.10 The shipping assessment (see **Chapter 15: Shipping and Navigation**) found no significant effects from the Project. All effects are identified as “Tolerable with mitigation” or “Broadly acceptable”. For deepwater routes that cross marine areas in the OAA there are substitute routes. The detailed assessment identifies the greatest increase in route length of 3.6% (for a short route) and one other route with an increase of 1.2%, while all others are less than 1%. The economic impacts from increased route lengths are estimated by Scottish Government as having an annualised impact on costs of £0.214m (Scottish Government, 2025a). The socio-economic effects of increased costs of navigation in constrained waters are also identified by Scottish Government but not quantified and are considered here as very low because transit times near the Project will be short. Recreational users will retain sufficient route choice offshore and may pass through the OAA.

1.9.9.11 In port areas, there is potential disruption to the multiple commercial and recreational uses of the ports by other operators in the North Sea but effects on port use is assessed as “Tolerable with mitigation” in the Navigational Risk Assessment undertaken for the Project (**Volume 3, Appendix 15.1: Navigational Risk Assessment**). It is expected that any additional land potentially required at ports will be subject to planning controls and would be permitted at the time only if appropriate. As additional mitigation, the Project can make specific selection of ports to further avoid and minimise effects.

Sensitivity of receptor

1.9.9.12 The sensitivity to changes in the agricultural sector is **low** because the land is classified as average rather than good and there is extensive other surrounding agricultural land while individual owners will be compensated.

1.9.9.13 The sensitivity to changes in the fishing sector is **medium** as there is potential use of substitute fishing areas with good levels of stock and overall catches are subject to quotas.

1.9.9.14 The sensitivity to the use of the offshore marine areas planned for the Project is **low** because there are substitute routes available for shipping though these incur minor additional costs.

1.9.9.15 Within port areas the sensitivity of marine users is considered to have a default level of **medium** due to the perpetual possibility of inadvertent interactions with other users and the ongoing use of ports by multiple operators in the North Sea.

1.9.9.16 The combined sensitivity is assessed as **medium** in line with a conservative approach to overall consideration of use of land and marine areas.

Magnitude of impact

1.9.9.17 The magnitude of effect from permanent loss to agriculture is considered **medium** in being equivalent to two thirds of a typical farm which is small in the context of agriculture generally though may have greater effects for owners directly affected by temporary or permanent change even though mediated through statutory arrangements for financial compensation.

1.9.9.18 The magnitude of effect from permanent reduction in fishing areas is considered **low** as the potential reduction in value is small compared to overall values of catches and may be mitigated through use of substitute areas.

1.9.9.19 The magnitude of effect on deepwater routes is **low** because of the substitute routes available to mariners.

1.9.9.20 The magnitude of effects related to ports depends on port selection and mitigation plans but is considered **medium** in view of the types of Project activities proposed and the potential for mitigation.

1.9.9.21 The combined magnitude is assessed as **medium** is view of the potential for multiple types of smaller impacts as well as a recognition that effects in aggregate are likely to be very low.

Significance of residual effect

1.9.9.22 The overall residual effects are assessed based on the overall assessment of sensitivity and magnitude. It is predicted that the sensitivity of the receptor is **medium**, and the magnitude is **medium**. The effect is of **Moderate Adverse** (**Potentially Significant**) in EIA terms but although potentially significant is assessed as **Not Significant** because of the underlying conservative approach and because the variety and range of effects provides a wide scope for design and mitigation actions.

1.9.10 Effects from disruption to community access to recreational, tourism and other amenity resources

Overview

1.9.10.1 The onshore recreational and tourist resources that are within the Red Line Boundary or may be otherwise affected are predominantly related to experience of nature and the outdoors and include footpaths, beaches, rivers, woodlands and a golf course (see **Chapter 22: Land Use**). The landfall zone at Scotstown and Lunderton North and South is designated as a Local Nature Conservation Site (LNCS).

1.9.10.2 Overall levels of community access to resources will be affected by both change in physical access and change in the quality of resources. The effects on quality of resources are substantially reduced through the use of HDD (or similar trenchless technique) for constructing crossings of roads and sensitive natural areas, including at landfall locations.

1.9.10.3 The presence and use of core paths is described and assessed in **Chapter 26: Traffic and Transport** and **Volume 4: Outline Construction Traffic Management Plan Appendix B Outline Core Path Management Plan**. There is no available data on the level of use of beaches within the study area.

1.9.10.4 The coastline is made up of a series of broad sandy bays including Sandford Bay to the south of Peterhead and a series of broader bays and rocky headlands to the north of Peterhead at Craigewan, Kirkton Head and Scotstown Head, backed by sand dunes and coastal grasslands. A prominent feature on the coast is the St Fergus gas terminal, which is nationally significant to the UK gas network.

1.9.10.5 Scotstown Beach is listed in Aberdeenshire Council's online list of beaches (Aberdeenshire Council, 2025b). The beach is not listed on the beach guide for Peterhead "Beaches in Peterhead, Grampian" (The Beach Guide, 2024) however, which instead lists six beaches significantly further away from Peterhead and the Best beach trails in Peterhead lists five beaches south of Peterhead and only one outside of Peterhead to the north (St Mary's Chapel and Rattray Lighthouse) (AllTrails, 2025). The latest walking blog is from 2015 (Mountains of Scotland, 2015). The attractions listed on the VisitScotland website for Peterhead include none to the north of Peterhead before Rattray lighthouse (VisitScotland, 2025).

1.9.10.6 Amenity resources that are not related to nature and the outdoors are expected to be accessed using the transport network for which no severance is expected (see **Chapter 26: Traffic and Transport**).

1.9.10.7 There are multiple major effects identified in the assessment in **Chapter 27: Landscape and Visual** which would affect experience of the area, with some lasting for multiple years.

1.9.10.8 Offshore, there is deepwater recreational boating in the OAA as indicated in the log of vessel movements but almost exclusively in summer (see **Chapter 15: Shipping and Navigation**). In the nearshore areas, all the ports include sailing and angling clubs (See **Table 1.26** and **Table 1.27**) while the Scottish government marine atlas which provides detailed maps and statistics on marine recreation shows a range of activities around the coast (NRS, 2015). **shows** Sailing and Cruising at Sea (Including Dinghies) and Visits to Historic Sites and Attractions.

1.9.10.9 Plate 1.9 shows Sailing and Cruising at Sea (Including Dinghies) and Visits to Historic Sites and Attractions.

Plate 1.9 Marine Recreation and Tourism Survey *(2015)* heatmap showing 'Sailing and cruising at sea including dinghies' (pictured left), and 'Visits to historic sites and attractions' (pictured right)

1.9.10.10 In the nearshore area most of the ports potentially used by the Project have a minimum of both sailing and angling clubs (See **Table 1.26** and **Table 1.27**). The use of marine areas by the Project (see **Section 1.9.9**) has the potential for disruption to the quality of these resources.

Table 1.26 Recreational sailing clubs identified at ports

Port	Sailing clubs
Cromarty Firth Green Freeport (Invergordon)	• Invergordon Boating Club; • Cromarty Boat Club; and • Chanonry Sailing Club.
Port of Aberdeen	• Aberdeen & Stonehaven Yacht Club; • Aberdeenshire Sailing Trust; and • Peterhead Sailing Club.
Port of Nigg	• Cromarty Boat Club.
Ardersier	• Nairn Sailing Club.
Inverness	• Inverness Yacht Club; and • Chanonry Sailing Club.
Burntisland	• Burntisland Sailing Club; • Aberdour Boat Club; and • Kinghorn Sailing Club.
Leith	• Port O'Leith Motor Boat Club; • Forth Corinthian Yacht Club; • Royal Forth Yacht Club; and • Portobello Sailing and Kayaking Club.

Port	Sailing clubs
Rosyth	• Forth Cruising Club; • North Queensferry Boar Club; • Queensferry Rowing Club; • Port Edgar Sailing School; • Edinburgh Watersports CIC; and • Port Edgar Yacht Club.
Grangemouth	• Grangemouth Yacht Club; • Blackness Boat Club; and • West Lothian Sailing Club.
Methil	• Methil Boat Club; and • Largo Bay Sailing Club.
Dundee	• Dundee Sea Cadets; • Dundee Sailing and Rowing Club; • Royal Tay Yacht Club; and • Wormit Boating Club.
Peterhead	• Peterhead Sailing Club.
Montrose	• Montrose Sailing Club.
Kishorn	• Plockton Small Boat Sailing Club.
Fraserburgh	• Rosehearty Community Boat Club.
Scapa (Orkney)	• Orkney Sailing Club; • Orkney Sailing Club Training Centre; • Holm Sailing Club; • Stromness Sailing Club; • The Girnel; • Kirkwall Marina; and • Sail Orkney.

Table 1.27 Recreational angling clubs identified at ports

Port	Angling clubs
Cromarty Firth Green Freeport (Invergordon)	• Cromarty Firth Fishery Board.
Port of Aberdeen	• Aberdeen and District Angling Association.
Port of Nigg	• Cromarty Firth Fishery Board.
Ardersier	N/A
Inverness	• Inverness Angling Club.
Burntisland	N/A
Leith	• Edinburgh Angling Centre (Shop);

Port	Angling clubs
	• Trout Anglers Club; and • Port O'Leith.
Rosyth	N/A
Grangemouth	• Larbert & Stenhousemuir Angling Club.
Methil	• Leven Angling Club.
Dundee	• Dundee Angling Club.
Peterhead	• Aberdeen and District Angling Association.
Montrose	• Fishing Lodge.
Kishorn	N/A
Fraserburgh	• Fraserburgh Angling Club.
Scapa (Orkney)	• Orkney Trout Fishing Association; and • Orkney Fisheries Association.

Sensitivity of receptor

1.9.10.11 The sensitivity of users of outdoor amenity resources is considered **high** by default as their main purpose is to experience natural areas without disruption. However, onshore users have the possibility to make use of similar alternative resources as habitats with similar characteristics are nearby. To a lesser degree, the use of alternative sections of the nearshore area may also be possible for recreational marine users, and the overall sensitivity is assessed as **medium**.

Magnitude of impact

1.9.10.12 Onshore, there is likely to be very limited change in physical access but a reduction in visual qualities of resources. The number of people experiencing onshore effects, particularly near the onshore substation is likely to be mainly regular car users commuting on the A950 rather than seeking experiences of nature.

1.9.10.13 Disruption to deepwater marine recreation is considered **very low** with the assumption that mariners follow good practice such as the Convention on the International Regulations for Preventing Collisions at Sea (COLREGS) (International Maritime Organisation, 1972).

1.9.10.14 In the nearshore area, the magnitude is assessed as **medium** because there will be increased port activity while management systems such as zoning and scheduling of recreational activities may not align with Project needs for towing space and weather windows.

Significance of residual effect

1.9.10.15 It is predicted that the overall sensitivity to change is **medium**, and the magnitude is **medium**. The effect is of **Moderate Adverse** (**Potentially Significant**) in EIA terms but although **Potentially Significant** is assessed as **Not Significant** as many of the reduced

landscape qualities will be recognised as temporary and there are further potential additional mitigations within ports.

1.9.11 Effects from activities affecting specific natural assets with socio-economic importance

Overview

1.9.11.1 The consideration of Project activities as they affect the local community is described above (see **Section 1.9.9.22**) and the corresponding impacts for visitors to the area are considered here.

Sensitivity of receptor

1.9.11.2 The sensitivity of visitors to the area is considered **high** by default as unless forewarned they are unlikely to expect to experience the activities related to the Project.

Magnitude of impact

1.9.11.3 Despite the use of HDD (or similar trenchless technique) to reduce environmental impacts, the magnitude of the onshore visual effects identified above is likely to seem greater for visitors than for the community as they experience Project activities as a first impression and are likely to have less familiarity with the area. However, because they will only have the experience for a short time during their visit the magnitude is assessed as **low**.

Significance of residual effect

1.9.11.4 It is predicted that the sensitivity of uses of recreational, tourism and other amenity resources is **high**, and the magnitude is **low**. The effect is of **Moderate Adverse** (**Potentially Significant**) in EIA terms but although **Potentially Significant** is assessed as **Not Significant** as many of the reduced landscape qualities will be clearly recognised by visitors as temporary and perhaps of interest.

1.9.12 Effects from disruption to commercial activities

Overview

1.9.12.1 Businesses in the study area may experience effects from the Project activities if both require the same resources. A key resource for business is transport and the assessment in **Chapter 26: Traffic and Transport** confirms that the network will remain largely unchanged for other road users. Both will also require labour resources and the effects of this demand has been assessed under Project demand for labour (**Section 1.9.2**) with the conclusion that markets are sufficiently resilient for there not to be significant effects in general and implying that adverse effects from labour shortages on local business would also not be significant.

1.9.12.2 Transport and labour are two key resources for many businesses. Needs for other resources are likely to be more specific to the activities of the business. It is likely that only if a shared requirement exceeded market capacity would there be disruption to business, for example another wind farm developer requiring the same specialist vessel.

Sensitivity of receptor

1.9.12.3 The sensitivity of businesses to disruption is considered **high** as any disruption is likely to lead to direct financial costs.

Magnitude of impact

1.9.12.4 The magnitudes of impact from potential travel and labour disruption are assessed above as not significant. As these are considered likely to be the main resources required by both the Project and other business, the magnitude of other effects is implicitly smaller and is considered **low**, subject to further information on specific markets with constraints that cannot be mitigated.

Significance of residual effect

1.9.12.5 It is predicted that the sensitivity of the receptor is **high**, and the magnitude is **low**. The effect is of **Minor Adverse** (**Not Significant**) in EIA terms.

1.9.13 Effects from socio-cultural and distributional effects

Overview

1.9.13.1 The Project will use both established supply chains in established socio-cultural contexts and new supply chains which may be influenced by the Project itself as well as the growth of the wind sector. During construction, manufacturing, fabrication, and installation activities will take place for up to 12 years portside together with further supply chain activities likely to be elsewhere. During operations, support for the assets and infrastructure will be required for the planned lifetime of 35 years for each Project phase.

1.9.13.2 Both construction and operational workforces have the potential to contribute to and affect the local socio-economic conditions of the localities in which they are based. As such, the greatest differences in outcomes for socio-cultural effects will depend on the existing conditions at the ports used as the bases for operations and on the distribution of Project employment.

1.9.13.3 The baseline assessment of ports identified similarities in terms of their socio-cultural characteristics but also noticeable differences. For example, in Aberdeen, Leith and Dundee the local populations have 12% to 20% fewer people who were born in the UK than the Scottish average while in most of the other ports this proportion of the population is above the Scottish average.

1.9.13.4 The baseline assessment also shows noticeable differences in the levels of deprivation near ports. This further indicates that employment generated by the Project may contribute in different ways according to the local circumstances.

Sensitivity of receptor

1.9.13.5 The socio-cultural contexts of the ports are appreciably different. As such the socio-cultural context is inherently sensitive and is assessed as **medium** reflecting the overall range of differences and similarities across the set of ports as well as a recognition that some aspects of the socio-cultural context may in principle be out of the scope that the Project could ever affect.

Magnitude of impact

1.9.13.6 The level and type of work contracted by the Project at different ports is likely to contribute to change in the socio-cultural context, but as there is not strong evidence for the

mechanism of change or of the level of employment distribution the magnitude is assessed as **low**.

Significance of residual effect

1.9.13.7 It is predicted that the sensitivity of the receptor is **medium**, and the magnitude is **low**. The effect is of **Minor Beneficial Significance** and **Not Significant** in EIA terms.

1.10 Assessment of effects: operation and maintenance stage

1.10.1 Introduction

1.10.1.1 The O&M assessment is presented as rows in the combined table of construction and operational effects (**Table 1.28**) with a justification for the differences in assessment for the two stages.

1.10.1.2 As identified in **Section 1.8.2**, the construction and operational stages of the Project overlap. They generate many of the same types of effects which may also occur as combined effects from activities taking place at the same time. Employment effects underlie many of the other effects and provide the basis for using a common assessment for both construction and operation.

1.10.1.3 The assessment of operational effects relies on the following similarities to the assessment of construction effects:

- overall employment levels of 1,065 for operation of 3GW and of 805 people on average over the period for construction (manufacture, fabrication and installation);
- average employment levels over the 12 year construction period of 445 for operation and 510 for portside manufacture, fabrication and installation;
- the relevance of the manufacturing and construction industry sectors (grouped as the BCF sector) for both operational and construction employment;
- the potential during both construction and operation stages to distribute employment between ports (while noting that such decisions have not been made yet); and
- the potential for employment planned at a port or other location to be determined in recognition of the potential for wider benefits to surrounding communities taking into account the individual characteristics of ports and the recommendations set out in the **SEAP**.

1.10.1.4 The assessment of operational effects recognises the following differences to the assessment of construction effects:

- the geographical advantages of ports nearer to the OAA mean that O&M employment is more likely to be generated in ports further to the north and east than in the firths of Forth, Cromarty, and the Inner Moray Firth;
- manufacture, fabrication and installation may be undertaken at locations further from the OAA as part of a supply chain; and
- the workforce levels per £m of expenditure are likely to be higher in the operational stage than in the construction stage.

1.10.2 Effects from Project demand for labour

1.10.2.1 The benefits of geographical proximity to the OAA mean that ports in the north and east are more likely to be used and so concentrated effects at ports are likely to continue. These are also ports which are more already established providing services to the oil and gas sector for the same reasons of proximity and are vulnerable to the decline in demand for fossil fuels. These ports, particularly Fraserburgh and Peterhead, are also characterised by areas of deprivation which are more sensitive to changes in employment. Aberdeen can also provide services to the Project and, as a larger port, it is less sensitive for the same change in employment and the combined sensitivity is considered to be **medium**.

1.10.2.2 The magnitude is greater because in the operational stage when all 3GW are installed, a greater proportion of the labour force will be undertaking activities based at specific ports over a longer period. While operational work is likely to include direct employment concentrated locally, it will also involve indirect employment through the more dispersed supply chain. The long-term employment and 'good jobs' offered by the Project provide the basis for an economic contribution, which provides stability to the workforce and structural benefits to the communities that depend on them throughout the supply chain in Scotland. The magnitude of impact is considered to be **medium**.

1.10.2.3 The greater concentration and larger long term labour force leads to an assessment of **Moderate Beneficial (Significant)** in EIA terms.

1.10.3 Effects from supply of labour to meet Project demand

1.10.3.1 The sensitivity of labour supply is considered to reflect in broad terms the same socio-economic conditions as in the construction stage while recognising that these may change particularly in response to decline in the oil and gas sector and growth in the offshore wind sector but that the level of change is uncertain. The sensitivity is considered to be **high**.

1.10.3.2 The Project demand for a workforce of 1,065 to service all 3GW is greater than the level of 805 for manufacturing, fabrication and installation. The local effects will also reflect the geographical benefits of the ports in the north and east and their labour market conditions and levels of supply. The magnitude of impact is considered to be **high**.

1.10.3.3 The concentration at ports where employment options may be limited and the potential provided by the Project for reduced unemployment and greater levels of opportunity in local labour markets leads to an assessment of effects which are **Major Beneficial (Significant)** in EIA terms.

1.10.4 Effects from Project demand for products and services

1.10.4.1 The market context is likely to reflect a mix of established and new products and services with increasingly specialised providers serving the offshore wind market. The products and services required by the Project for O&M are, as in the construction stage, a proportion of those required by the overall market. The sensitivity is considered **medium** reflecting a similar mix of mature services and potential constraints.

1.10.4.2 The project will generate appreciably greater demand for O&M services than during the construction stage as a reflection of operation of the full 3GW. This demand is likely to be focussed on increasingly specialised services delivering efficiency benefits for O&M with Project potentially one of the largest customers in the North Sea. The magnitude of impact is considered to be **medium**.

1.10.4.3 Based on the sensitivity and magnitude of impact, the effects are considered **Moderate (Potentially Significant)** but taking account of the long term nature of the demand and

opportunity to contribute to efficiency benefits overall, the effect is assessed overall as of **Moderate Beneficial Significance** and **Significant** in EIA terms.

1.10.5 Effects from supply of products and services

1.10.5.1 The O&M stage is likely to require more specialised supply of products and services and will be focused more on technical services and replacement parts. As such the Project will affect supply in narrower set of markets and there will be lower levels of material purchases as a proportion of expenditure. Overall expenditure levels will also be lower in the O&M stage however the Project will still make an important contribution to maintaining and supporting supply capacity.

1.10.5.2 The sensitivity of suppliers is considered to be **medium** and the magnitude of impact **medium** with effects which are considered **Moderate (Potentially Significant)** but, taking account of the long term contribution to suppliers, the effect is assessed overall as of **Moderate Beneficial Significance** and **Significant** in EIA terms.

1.10.6 Effects from economic activity (GVA) within the local and wider economies

1.10.6.1 The sensitivity to levels of economic activity reflects the socio-economic conditions in local authority areas and ports and is considered **medium** as for the construction stage.

1.10.6.2 The magnitude of change reflects the greater proportion of workers with a higher level of GVA per worker and an overall greater workforce. This workforce is likely to be more concentrated in ports in the north and east near the OAA and so GVA effects will also have a greater local impact. The magnitude of change is considered **high**.

1.10.6.3 The scale and concentration of effects within sensitive local economies leads to an assessment of **Major Beneficial (Significant)** in EIA terms.

1.10.7 Impact from increase in population

1.10.7.1 The sensitivity to population growth reflects the socio-economic conditions in local authority areas and ports and differs from the construction stage as the communities are more likely to be those in the north and east which are smaller than those providing manufacturing, fabrication and installation activities. The sensitivity is considered **medium**.

1.10.7.2 The magnitude is greater than in the construction stage and the population growth related to employment may be more locally concentrated leading to an assessment of **medium**.

1.10.7.3 Based on the sensitivity and magnitude of impact, the effects are considered **Moderate (Potentially Significant)** but taking account of the offsetting potential decline in population from reduced employment in the oil and gas sector variation, the effect is assessed overall as of **Moderate Adverse Significance** and **Not Significant** in EIA terms.

1.10.8 Effects from Project transport and access requirements

1.10.8.1 The underlying community and business needs for a transport network remain the same and sensitivity to traffic and transport is considered **high** as for the construction stage.

1.10.8.2 There will be fewer heavy goods vehicle movements than in the construction stage while there may be greater commuter traffic reflecting O&M employment in particular ports. The additional transport requirement created by Project employment may have beneficial effects

in supporting public transport. On balance the magnitude of impact is assessed as **very low**.

1.10.8.3 The effect is assessed overall as **Minor Adverse (Not Significant)** in EIA terms.

1.10.9 Effects from use of land and marine areas

1.10.9.1 The sensitivity of uses of land and marine areas is considered **medium** as for the construction stage.

1.10.9.2 There remains a long-term requirement for vessels to navigate around the OAA and for the use of ports to service O&M activities. Onshore, the land use is limited to the area needed for the onshore substation. As the use of ports will be compared to the construction stage and the temporary onshore construction activities will be completed the magnitude of impact is assessed as **low**.

1.10.9.3 The effect is assessed overall as **Minor Adverse (Not Significant)** in EIA terms.

1.10.10 Effects from disruption to community access to recreational, tourism and other amenity resources

1.10.10.1 The sensitivity to disruption is considered **medium** as for the construction stage. While there are some permanent changes related to the onshore substation as all temporary construction activities will be completed the magnitude of impact is assessed as **very low**.

1.10.10.2 The effect is assessed overall as **Minor Adverse (Not Significant**) in EIA terms.

1.10.11 Effects from activities affecting specific natural assets with socio-economic importance

1.10.11.1 The sensitivity of visitors is considered **high** as for the construction stage.

1.10.11.2 The permanent changes are not likely to be of a scale that is notable for a visitor and reinstatement will have been completed after the temporary construction activities with a magnitude of impact considered **very low**.

1.10.11.3 The effect is assessed overall as **Minor Adverse (Not Significant)** in EIA terms.

1.10.12 Effects from disruption to commercial activities

1.10.12.1 The sensitivity of businesses to disruption is considered **high** as for the construction stage.

1.10.12.2 The magnitude of impact is less than in the construction stage as Project activities are related only to O&M and is considered **very low**.

1.10.12.3 The effect is assessed overall as **Minor Adverse (Not Significant)** in EIA terms.

1.10.13 Effects from socio-cultural and distributional effects

1.10.13.1 The socio-cultural context is inherently sensitive and is assessed as **medium** reflecting the range of socio-economic characteristics of ports likely to be used for O&M activities.

1.10.13.2 The magnitude of impact is considered **medium** which is greater than in the construction stage as the O&M activities are greater in scale and will endure over a longer period. There is a correspondingly greater scope for the Project to target employment growth and supply chain expenditure where it can most influence socio-cultural conditions.

1.10.13.3 Based on the sensitivity and magnitude of impact, the effects are considered **Moderate (Potentially Significant)** but taking account of the opportunity for continuous enhancement through the role of the Project as a core employer in particular ports, the effect is assessed overall as of **Moderate Beneficial Significance** and **Significant** in EIA terms.

1.11 Assessment of effects: decommissioning stage

1.11.1.1 As identified in **Section 1.8.23** decommissioning activities can be considered as a version of construction 'in reverse'.

1.11.1.2 The main economic difference between construction and decommissioning arises from the high financial value of a newly constructed WTG and the comparatively low financial value of the products from a disassembled and recycled WTG. This leads directly to a difference in incentives for the speed of construction and speed of decommissioning.

1.11.1.3 For disassembly, a smaller more experienced and stable workforce working over a longer timeframe can be cheaper than finding and retaining a larger workforce working over a shorter timeframe.

1.11.1.4 Ports suitable for decommissioning are those with large and sheltered sea areas nearby that can be used to store redundant WTGs, such as Scapa, Nigg and Invergordon. A smaller population may not be a practical constraint on workforce size for efficient decommissioning given the financial trade-offs, though the optimum size will still depend on the number of WTGs. An advantage of using ports with large, sheltered areas which has financial consequences is that redundant WTGs will not require storage at ports with other constraints and roles.

1.11.1.5 The socio-economic consequences of decommissioning are complex to foresee as they will depend on a supply chain which could have dedicated services for each stage of WTG disassembly provided from local or international hubs with effects on Scapa or other ports according to their position in the supply chain.

1.11.1.6 For these reasons, the socio-economic consequences of decommissioning are not assessed in more detail than to suggest that they are likely to be positive for the main decommissioning ports and for ports offering services in the related supply chain (such as harbour facilities for tugs) due to the intrinsic commercial opportunity. Development of a Decommissioning Programme (M-227) at the relevant time which would consider socio-economic consequences in more detail is proposed by the Applicant.

1.12 Summary of effects

1.12.1.1 A summary of the significance of effects arising from the construction and O&M. and decommissioning of the Project are provided in **Table 1.28**.

Table 1.28 Summary of effects on socio-economics

Receptor	Sensitivity	Activity and potential effect	Embedded environmental measures	Magnitude	Significance of effect
Construction					
Employment markets	**Medium**	Project demand for labour.	M-219 M-222 M-224 M-225 M-226 M-227 M-228	**Low**	**Minor Beneficial** (**Not Significant**).
Potential workers	**High**	Supply of labour to meet Project demand.		**Medium**	**Major Beneficial** (**Significant**).
Materials, equipment and services markets	**Medium**	Project demand for products and services.		**Medium**	**Moderate Beneficial** (**Not Significant**).
Potential private sector suppliers, including local business	**Medium**	Supply of products and services.		**High**	**Major Beneficial** (**Significant**).
Users; Landowners and developers; local authorities with statutory responsibility for planning	**Medium**	Use of land and marine areas.		**Medium**	**Moderate Adverse** (**Not Significant**).
The economy	**Medium**	Economic activity (GVA) within the local and wider economies.		**Medium**	**Moderate Beneficial** (**Not Significant**).

Receptor	Sensitivity	Activity and potential effect	Embedded environmental measures	Magnitude	Significance of effect
People and communities living and working in the area of the Project	**Low**	Increase in population.		**Low**	**Minor Adverse** (**Not Significant**).
People and communities in the area of the Project	**Medium**	Disruption to community access to recreational, tourism and other amenity resources.		**Medium**	**Moderate Adverse** (**Not Significant**).
Businesses in the area of the Project	**High**	Disruption to commercial activities.		**Low**	**Minor Adverse** (**Not Significant**).
People and communities travelling and accessing land and amenities within the area of the Project	**High**	Project transport and access requirements.		**Very low**	**Minor Adverse** (**Not Significant**).
Visitors to the area of the Project	**High**	Activities affecting specific natural assets with socio-economic importance.		**Low**	**Moderate Adverse (Not Significant**).
Local communities	**Medium**	Socio-cultural and distributional effects.		**Low**	**Moderate Beneficial** (**Not Significant**).
O&M					

Receptor	Sensitivity	Activity and potential effect	Embedded environmental measures	Magnitude	Significance of effect
Employment markets	**Medium**	Project demand for labour.	M-219 M-222 M-224 M-225 M-226 M-227 M-228	**Medium**	**Moderate Beneficial** (**Significant**).
Potential workers	**High**	Supply of labour to meet Project demand.		**High**	**Major Beneficial** (**Significant**).
Materials, equipment and services markets	**Medium**	Project demand for products and services.		**Medium**	**Moderate Beneficial** (**Significant**).
Potential private sector suppliers, including local business	**Medium**	Supply of products and services.		**Medium**	**Moderate Beneficial** (**Significant**).
Users; Landowners and developers; local authorities with statutory responsibility for planning	**Medium**	Use of land and marine areas.		**Low**	**Minor Adverse** (**Not Significant**).
The economy	**Medium**	Economic activity (GVA) within the local and wider economies.		**High**	**Major Beneficial** (**Significant**).

Receptor	Sensitivity	Activity and potential effect	Embedded environmental measures	Magnitude	Significance of effect
People and communities living and working in the area of the Project	**Medium**	Increase in population.		**Medium**	**Moderate Adverse** (**Not Significant**).
People and communities in the area of the Project	**Medium**	Disruption to community access to recreational, tourism and other amenity resources.		**Very low**	**Minor Adverse** (**Not Significant**).
Businesses in the area of the Project	**High**	Disruption to commercial activities.		**Very low**	**Minor Adverse** (**Not Significant**).
People and communities travelling and accessing land and amenities within the area of the Project	**High**	Project transport and access requirements.		**Very low**	**Minor Adverse** (**Not Significant**).
Visitors to the area of the Project	**High**	Activities affecting specific natural assets with socio-economic importance.		**Very low**	**Minor Adverse** (**Not Significant**).
Local communities	**Medium**	Socio-cultural and distributional effects.		**Medium**	**Moderate Beneficial** (**Significant**).

1.13 Transboundary effects

1.13.1.1 Transboundary effects arise when impacts from a development with one European Economic Area (EEA) State affects the environment of another EEA State(s). A screening of transboundary effects have been carried out and is presented in Appendix 4B of the Scoping Report (MarramWind Ltd., 2023).

1.13.1.2 Based on the established baseline environment, the defined nature and scale of the proposed works, and a robust body of evidence from comparable offshore wind farm developments, such as the Caledonia Offshore Wind Farm, Green Volt Offshore Wind Farm, Muir Mhór Offshore Wind Farm and Salamander Offshore Wind Farm, no transboundary effects are anticipated on infrastructure and other marine users receptors. This conclusion is supported by the findings of the transboundary screening (MarramWind Limited, 2023), which confirms that the ZOI remains confined to UK waters and does not extend into the jurisdiction of other EEA states.

1.14 Inter-related effects

1.14.1.1 A description and assessment of the likely inter-related effects arising from the Project on socio-economics is provided in **Chapter 32: Inter-Related Effects**.

1.15 Assessment of cumulative effects

1.15.1.1 A description and assessment of the cumulative effects arising from the Project on socio-economics is provided in **Chapter 33: Cumulative Effects Assessment**.

1.16 Summary of residual likely significant effects

1.16.1.1 **Table 1.29** presents a summary of the residual likely significant effects on socio-economics receptors assessed in the EIA Report Chapter.

Table 1.29 Summary of assessment of residual likely significant effects for socio-economics

Receptor	Sensitivity or value	Activity and potential effect	Embedded environmental measures	Magnitude of effect	Assessment of residual likely significant effects
Construction					
Potential workers	**High**	Supply of labour to meet Project demand.	M-224	**Medium**	**Significant (beneficial)**
Potential private sector suppliers, including local business	**Medium**	Supply of products and services.	M-225	**High**	**Significant (beneficial)**
Operation and maintenance					
Employment markets	**Medium**	Project demand for labour.	M-224	Medium	**Significant (beneficial)**
Potential workers	**High**	Supply of labour to meet Project demand.	M-224	High	**Significant (beneficial)**
Materials, equipment and services markets	**Medium**	Project demand for products and services.	M-225	Medium	**Significant (beneficial)**
Potential private sector suppliers, including local business	**Medium**	Supply of products and services.	M-225	Medium	**Significant (beneficial)**

Receptor	Sensitivity or value	Activity and potential effect	Embedded environmental measures	Magnitude of effect	Assessment of residual likely significant effects
The economy	**Medium**	Economic activity (GVA) within the local and wider economies.	-	High	**Significant (beneficial)**
Local communities	**Medium**	Socio-cultural and distributional effects.	-	Medium	**Significant (beneficial)**
Decommissioning					
Effects will be subject to a decommissioning plan at the time and are likely to be beneficial with significance that will depend on multiple factors including available local capacity and international market prices.					

1.17 References

Aberdeen City Council, (2025). *Community Centres in Aberdeen*. [online] https://www.aberdeencity.gov.uk/services/leisure-culture-and-parks/community-centres-aberdeen [Accessed: 01 July 2025]

Aberdeenshire Council, (2023a). *Aberdeenshire Local Development Plan*. [online] Available at: https://www.aberdeenshire.gov.uk/planning/plans-and-policies/ldp-2023/ [Accessed: 1 October 2025].

Aberdeenshire Council, (2023b). *Aberdeenshire Council's Scoping Opinion for Offshore Wind Farm Project at MarramWind Offshore Wind Farm*. [online] Available at: https://upa.aberdeenshire.gov.uk/online-applications/applicationDetails.do?activeTab=documents&keyVal=RPB0TVCA04U00 [Accessed: 01 October 2025].

Aberdeenshire Council, (2024). Aberdeenshire Council Pre-Application Advice Report.

Aberdeenshire Council, (2025a). *Energy Development Charter - Community Wealth Building Strategy*. Engage Aberdeenshire. [online] Available at: https://engage.aberdeenshire.gov.uk/39899/widgets/119172/documents/81055 [Accessed: 1 October 2025].

Aberdeenshire Council, 2025b. Beaches. [online] Available at: https://www.aberdeenshire.gov.uk/leisure-sport-and-culture/aberdeenshire-tourist-and-visitor-information/beaches/ {Accessed 13/11/2025].

AllTrails, (2025). *Best beach trails in Peterhead*. [online] Available at: https://www.alltrails.com/en-gb/scotland/aberdeenshire/peterhead/beach [Accessed: 01 September 2025].

British Medical Association (BMA), (2023). *BMA Scotland: General practice cannot sustain the pressures of this 'full-blown crisis' any longer*. [online] Available at: https://www.bma.org.uk/bma-media-centre/bma-scotland-general-practice-cannot-sustain-the-pressures-of-this-full-blown-crisis-any-longer#:~:text=media%20centre%20%2D%20BMA-,BMA%20Scotland:%20General%20practice%20cannot%20sustain%20the%20pressures%20of%20this,8.16%25%20in%20just%20five%20years [Accessed: 01 July 2025].

Connon, A., and McFarlane, J., (2024). *UK 2050 offshore wind deployment scenarios*. [online] Available at: https://fowcoe.co.uk/wp-content/uploads/2024/10/FOW-CoE-UK-OW-Deployment-Scenarios-2050-Public-Report.pdf [Accessed 06 October 2025].

Department for Business and Trade, (2025). *The UK's Modern Industrial Strategy 2025*. [online] Available at: https://www.gov.uk/government/collections/the-uks-modern-industrial-strategy-2025 [Accessed: 01 October 2025].

Department for Energy Security and Net Zero (DESNZ), (2023). *Developing the North Seas as a green power plant of Europe: North Sea Summit declarations*. [online] Available at: https://www.gov.uk/government/publications/developing-the-north-seas-as-a-green-power-plant-of-europe-north-sea-summit-declarations [Accessed 06 October 2025].

Department for Energy Security and Net Zero DESNZ, (2025). Job estimates for wind generation by 2030: methodology note Available at: https://www.gov.uk/government/publications/renewable-technologies-future-job-estimates-methodology/job-estimates-for-wind-generation-by-2030-methodology-note [Accessed 01 November 2025]

Department for Environment, Food and Rural Affairs (DEFRA), (2025a). Structure of the agricultural industry in England and the UK in June (statistics for County Durham). Available at:

https://www.gov.uk/government/statistical-data-sets/structure-of-the-agricultural-industry-in-england-and-the-uk-at-june [Accessed September 2025].

Department for Environment, Food and Rural Affairs (DEFRA), 2025b. Farm Rents in England, 2023/24 – statistics notice. Available at: https://www.gov.uk/government/statistics/farm-rents/farm-rents-in-england-202324-statistics-notice [Accessed November 2025]

Électricité de France (EDF) Energy, (2011). *Hinkley Point C Pre-Application Consultation – Stage 2 Environmental Statement Volume 2 Chapter 8: Socio-Economics*. [online] Available at: https://www.edfenergy.com/sites/default/files/V2%20C08%20SOCIO%20ECONOMICS.pdf [Accessed: 07 October 2025].

Fishing News, 2025. Scots fleet lands highest value tonnage in 10 years (11 November 2025). [online] Available at: https://fishingnews.co.uk/news/scots-fleet-lands-highest-value-and-tonnage-in-10-years/ [Accessed 12 November 2025]

Glasson, J., (2009). *Socio-economic impacts 1: overview and economic impacts'*. In: Morris, P. and Therivel, R. (eds.) Methods of environmental impact assessment. 3rd edition. Abingdon: Routledge, pp. 20-41.

Glasson, J., Durning, B., Olorundami, T. and Welch, K., (2020). *Guidance on assessing the socio-economic impacts of offshore wind farms*. Impact Assessment Unit, Oxford Brookes University [online]. Available at: https://radar.brookes.ac.uk/radar/items/6c7548dd-c768-4db8-9dce-7980c426c7a4/1/ [Accessed: 6 October 2025].

Highland Council, (2024) Highland Local Development Plan - Evidence Consultation (2024). Available at: https://consult.highland.gov.uk/kpse/event/9D376DAB-42E8-4722-9AB2-5C223E68317E/section/s17307163036241 [Accessed October 2025

HM Treasury, (2022). *The Green Book (2022).* [online] Available at: https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2020 [Accessed 06 October 2025].

Homes and Communities Agency, (2014). *Additionality Guide*. Fourth Edition 2014. [online] Available at: https://assets.publishing.service.gov.uk/media/5a7ec4b9e5274a2e87db1c92/additionality_guide_2014_full.pdf [Accessed 06 October 2025].

International Maritime Organization, (1972). *Convention on the International Regulations for Preventing Collisions at Sea, 1972 (COLREGs).* [online] Available at: https://www.imo.org/en/about/conventions/pages/colreg.aspx [Accessed: 01 September 2025].

Live Life Aberdeenshire, (2020.) *Independent Community Venues in Aberdeenshire*. [online] Available at: https://www.livelifeaberdeenshire.org.uk/community-halls/independent-community-halls/ [Accessed: 01 August 2025].

MarramWind Limited, (2023b). *MarramWind SCDS Outlook Update – April 2023*. [online] Available at: https://www.glenlivetestate.co.uk/sites/default/files/2023-07/marramwind-scds-outlook-july-2023-update.pdf [Accessed: 06 October 2025].

Moray Council, (2020). *Moray Local Development Plan 2020*. [online] Available at: http://www.moray.gov.uk/moray_standard/page_133431.html [Accessed: 06 October 2025].

Mountains of Scotland, (2015). Coastal Walk: Scotstown Beach to Rattray Head (and back). [online] Available at: https://www.mountainsofscotland.co.uk/TripReports/20150801.htm [Accessed: 01 September 2025].

National Records of Scotland (NRS), (2015). *Scottish Marine Recreation & Tourism Survey 2015*. [online] Available at:

https://webarchive.nrscotland.gov.uk/20180104062926/http://www.gov.scot/Topics/marine/seamanagement/national/RecandTourism [Accessed: 01 September 2025]

National Records of Scotland (NRS), (2020a). *Population Projections for Scottish Areas 2018-based*. [online] Available at: https://www.nrscotland.gov.uk/publications/population-projections-for-scottish-areas-2018-based/ [Accessed: 01 August 2025]

National Records of Scotland (NRS), (2020b). *Household Projections for Scotland, 2018-based*. [online] Available at: https://www.nrscotland.gov.uk/publications/household-projections-for-scotland-2018-based/ [Accessed: 01 August 2025]

National Records of Scotland (NRS), (2024). *Life Expectancy in Scotland 2021-2023*. [online] Available at: https://www.nrscotland.gov.uk/publications/life-expectancy-in-scotland-2021-2023/# [Accessed: 01 June 2025].

National Records of Scotland (NRS), (2025a). *Households and Dwellings in Scotland, 2024*. [online] Available at: https://www.nrscotland.gov.uk/publications/households-and-dwellings-in-scotland-2024/#households [Accessed: 01 August 2025]

National Records of Scotland (NRS) (September 2025), 2025b. Subnational Population Projections: 2022-based. Available at: https://www.nrscotland.gov.uk/publications/subnational-population-projections-2022-based/ [Accessed October 2025]

Office for National Statistics (ONS), (2024). *Population estimates - Local Authority based by five year age band.* [online] Available at: https://www.nomisweb.co.uk/query/construct/summary.asp?reset=yes&mode=construct&dataset=31&version=0&anal=1 [Accessed: 01 July 2025]

Office for National Statistics (ONS), (2025a). *Regional gross value added (balanced) by industry: all ITL regions*. [online] Available at: https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/nominalandrealregionalgrossvalueaddedbalancedbyindustry [Accessed: 01 July 2025]

Office for National Statistics (ONS), (2025b). *Regional gross value added (balanced) per head and income components.* [online] Available at: https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/nominalregionalgrossvalueaddedbalancedperheadandincomecomponents [Accessed: 01 July 2025]

Office for National Statistics (ONS), (2025c). *Local Authority Profile*. [online] Available at: https://www.nomisweb.co.uk/reports/lmp/la/contents.aspx [Accessed: 01 July 2025]

Office for National Statistics (ONS), (2025d). *Regional economic activity by gross domestic product dataset.* [online] Available at: https://www.ons.gov.uk/economy/grossdomesticproductgdp/bulletins/regionaleconomicactivitybygrossdomesticproductuk/latest [Accessed: 17 April 2025].

Office for National Statistics (ONS), (2025e). UK input-output analytical tables:2022. Fishing And Aquaculture sector. Available at: https://www.gov.uk/government/statistics/uk-input-output-analytical-tables2022 [Accessed October 2025]

Office for National Statistics (ONS), (2025f). CC01 Regional labour market: Claimant Count by unitary and local authority [online] Available at: https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/datasets/claimantcountbyunitaryandlocalauthorityexperimental/current [Accessed October 2025]

Office of Budget Responsibility, (2025). *Economic and fiscal outlook – March 2025*. [online] Available at: https://obr.uk/efo/economic-and-fiscal-outlook-march-2025/ [Accessed: 01 September 2025].

Offshore Wind Industry Council, (2023). *Offshore Wind Skills Intelligence Report*. [online] Available at: https://www.owic.org.uk/media/gf5ddwxt/offshore-wind-skills-intelligence-report-2023.pdf [Accessed: 01 September 2025].

Public Health Scotland, (2022). *General Practice - GP workforce and practice list sizes*. [online] Available at: https://publichealthscotland.scot/publications/general-practice-gp-workforce-and-practice-list-sizes/general-practice-gp-workforce-and-practice-list-sizes-2012-2022/ [Accessed: 01 August 2025].

Savills, (2024). Rural land values. Available at: https://www.savills.co.uk/landing-pages/rural-land-values.aspx [Accessed September 2025].

Scotland Tourism Observatory, (2019). *Domestic Overnight Visitors to Regions of Scotland (2013 to 2019) – Grampian*. Available at: https://tourismobservatory.scot/data/insights/domestic-overnight-visitors-to-regions-of-scotland-2013-to-2019/ [Accessed: 26 May 2025]

Scotland Tourism Observatory, (2023). *International visitors to the regions of Scotland - Grampian*. Available at: https://tourismobservatory.scot/data/insights/international-visitors-to-the-regions-of-scotland/ [Accessed: 26 May 2025].

Scottish Government, (2015). *Scotland's National Marine Plan*. [online] Available at: https://www.gov.scot/publications/scotlands-national-marine-plan/ [Accessed: 01 October 2025].

Scottish Government, (2016). *Draft Advice on Net Economic Benefit and Planning*. [online] Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2016/03/draft-advice-on-net-economic-benefit-and-planning/documents/draft-advice-net-economic-benefit-planning-pdf/draft-advice-net-economic-benefit-planning-pdf/govscot%3Adocument/Draft%2BAdvice%2Bon%2BNet%2BEconomic%2BBenefit%2Band%2BPlanning.pdf [Accessed: 06 October 2025].

Scottish Government, (2020a). *Offshore Wind Policy Statement*. [online] Available at: https://www.gov.scot/publications/offshore-wind-policy-statement/ [Accessed: 1 October 2025].

Scottish Government, (2020b). *Scottish Index of Multiple Deprivation 2020v2 – ranks*. [online] Available at: https://www.gov.scot/publications/scottish-index-of-multiple-deprivation-2020v2-ranks/ [Accessed: 01 June 2025].

Scottish Government, (2022). *Scotland's National Strategy for Economic Transformation – Delivery Plans October 2022*. [online] Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2022/10/scotlands-national-strategy-economic-transformation-delivery-plans-october-2022/documents/delivering-economic-prosperity-delivery-plans/delivering-economic-prosperity-delivery-plans/govscot%3Adocument/delivering-economic-prosperity-delivery-plans.pdf [Accessed: 06 October 2025]

Scottish Government, (2022a). *Marine Protected Areas in inshore waters: guidance for undertaking Socio-Economic Impact Assessments (SEIA)*. [online] Available at: https://www.gov.scot/publications/marine-protected-areas-inshore-waters-guidance-undertaking-socio-economic-impact-assessments-seia/pages/6/ [Accessed 06 October 2025].

Scottish Government, (2022b). *Defining 'local areas' for assessing the economic impact of offshore renewables and other marine developments: guidance principles*. [online] Available at: https://www.gov.scot/publications/defining-local-area-assessing-impact-offshore-renewables-marine-developments-guidance-principles/ [Accessed 06 October 2025].

Scottish Government, (2023a). *National Planning Framework 4*. [online] Available at: https://www.gov.scot/publications/national-planning-framework-4/documents/ [Accessed: 1 October 2025].

Scottish Government, (2023b). *MarramWind Offshore Wind Farm Environmental Impact Assessment – Scoping Opinion*. [online] Available at: https://marine.gov.scot/node/23928 [Accessed: 22 June 2023].

Scottish Government, (2024). *Green Industrial Strategy*. [online] Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2024/09/green-industrial-strategy/documents/green-industrial-strategy/green-industrial-strategy/govscot%3Adocument/green-industrial-strategy.pdf [Accessed: 06 October 2025].

Scottish Government (2025a). Draft Updated Sectoral Marine Plan for Offshore Wind Energy: Social and Economic Impact Assessment. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/impact-assessment/2025/05/draft-updated-sectoral-marine-plan-offshore-wind-energy-social-economic-impact-assessment/documents/draft-updated-sectoral-marine-plan-offshore-wind-energy-social-economic-impact-

Scottish Government, (2025b). *Programme for Government 2025 to 2026*. [online] Available at: https://www.gov.scot/publications/programme-government-2025-26/ [Accessed: 06 October 2025].

Scottish Government, (2025c). *Aberdeen City SIMD 2020 Social Deprivation*. [online] Available at: https://datamap-scotland.co.uk/simd-local-authorities/aberdeen-city-social-deprivation/ [Accessed: 01 June 2025].

Scottish Renewables, (2025). *Scottish offshore wind pipeline analysis*. [online] Available at: https://www.scottishrenewables.com/assets/000/004/841/250624_BVGA-32514-Scotland_offshore_wind_pipeline_analysis-r4_FINAL_original.pdf?1750767087 [Accessed: 06 October 2025].

Spatial Hub Scotland, (2023). *Leisure & Community Centres – Aberdeenshire*. [online] Available at: https://data.spatialhub.scot/dataset/leisure_community_centres-as [Accessed: 01 July 2025]

Sport Aberdeen, (2025). *Venues*. [online] Available at: https://www.sportaberdeen.co.uk/venues [Accessed: 01 July 2025].

The Beach Guide, (2024). *Beaches in Peterhead, Grampian*. [online] Available at: https://www.thebeachguide.co.uk/north-scotland/grampian/peterhead-town [Accessed: 01 September 2025].

The Highland Council, (2012). *Highland-wide Local Development Plan.* [online] https://www.highland.gov.uk/info/178/development_plans/199/highland-wide_local_development_plan [Accessed 06: October 2025].

UK Government, (2024). *Clean Power 2030 Action Plan: A new era of clean electricity*. [online] Available at: https://assets.publishing.service.gov.uk/media/677bc80399c93b7286a396d6/clean-power-2030-action-plan-main-report.pdf [Accessed: 01 October 2025].

UK Land Registry, (2025). *UK House Price Index*. [online] Available at: https://landregistry.data.gov.uk/app/ukhpi/compare?in=avg&location[]=S12000033&location[]=S92000003&location[]=S12000034&st=all&lang=en [Accessed: 01 August 2025].

VisitScotland, (2023). *Aberdeen, Aberdeenshire, and Moray Speyside*. [online] Available at: https://www.visitscotland.org/research-insights/regions/aberdeen-aberdeenshire#statistics [Accessed: 01 May 2025].

VisitScotland, (2025). *Peterhead*. [online] Available at: https://www.visitscotland.com/info/towns-villages/peterhead-p238121 [Accessed: 01 September 2025].

1.18 Glossary of terms and abbreviations

1.18.1 Abbreviations

Acronym	Definition
APF Hinterland	Aberdeen, Peterhead and Fraserburgh
BCF Sector	B : Mining and Quarrying', 'C : Manufacturing', and 'F: Construction'
BMA	British Medical Association
COLREGS	Convention on the International Regulations for Preventing Collisions at Sea
DCLG	Department of Housing, Communities and Local Government
EEA	European Economic Area
EIA	Environmental Impact Assessment
FTE	Full-time equivalent
GP	General Practitioner
GVA	Gross Value Added
HDD	Horizontal directional drilling
IAT	Indicative Assessment Thresholds
MAU	Marine Analytical Unit
MD-LOT	Marine Directorate – Licensing Operations Team
NMU	Non-Motorised User
NPF4	National Planning Framework 4
NRS	National Records of Scotland
O&M	Operation and maintenance
OAA	Option Agreement Area
ONS	Office for National Statistics
RQF	Regulated Qualifications Framework
SCDS	Supply Chain Development Statement
SEAP	Socio-Economic Action Plan
SEIA	Socio-Economic Impact Assessment
SIMD	Scottish Indices of Multiple Deprivation

Acronym	Definition
SOV	Service Operation Vessel
WTG	Wind turbine generator
ZOI	Zone of Influence

1.18.2 Glossary of terms

Term	Definition
Claimant	A person applying for or receiving financial support from the UK government to help with the cost of living. Examples include Income Support and Universal Credit.
Conurbation	An extended urban area, often comprised of several towns that have merged with wider urban areas or city suburbs.
Deprivation	A lack of, or insufficiency of material necessities and social structure that can have detrimental societal consequences.
Distributional effects	Consequences of an action or activity that are unevenly spread within a population or community, being felt by certain groups of people or in certain locations more than others.
Full-time equivalent (FTE)	A unit of measure that standardises the workload of a workforce by comparing average working hours to the standard hours of a full-time employee.
Gross value added (GVA)	An economic indicator that measures the contribution of an industry, sector or geographical region by balancing the value of its outputs against the value of its goods and services used in the production of its outputs.
Hinterland	Areas remote from urban centres.
Inflationary pressure	Economic factors that drive a price increase over time for goods and services.
Life expectancy	The average number of years that a person can be expected to live, which may vary depending on socio-economic circumstances.
Local authority	An administrative organisation with local responsibility for public services and governance.
Natural assets	Naturally occurring components of the environment that provide societal value and benefit. Examples include air, water, soils, wildlife, forests and landscape.

Term	Definition
Parliamentary ward	A sub-national electoral district representing a Scottish parliamentary constituency.
Socio-cultural	Relating to, or involving a combination of both social and cultural factors. These include factors such as social classes, wealth distribution, language and religion, and can influence the feelings, beliefs, values, behaviours, attitudes and interactions of people and communities.
Socio-economics	Relating to or involving a combination of both social and economic factors. These include factors such as income, occupation, education, wealth, and living conditions including family structures, and can influence the opportunities, social status, and health of people and communities.

MarramWind