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# **Volume 6 Intertidal and Combined Assessments**

## Chapter 2 Socio-Economics, Tourism and Recreation

Caledonia Offshore Wind Farm Ltd

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# Volume 6 Chapter 2 Socio-Economics, Tourism and Recreation

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## Acronyms and Abbreviations

<b>%</b>	Percentage
<b>AfL</b>	Agreement for Lease
<b>CIA</b>	Cumulative Impact Assessment
<b>EIA</b>	Environmental Impact Assessment
<b>EIAR</b>	Environmental Impact Assessment Report
<b>EU</b>	European Union
<b>GDP</b>	Gross Domestic Product
<b>GP</b>	General Practitioner
<b>GVA</b>	Gross Value Added
<b>km</b>	Kilometre
<b>LMP</b>	Lighting and Marketing Plan
<b>MAU</b>	Marine Analytical Unit
<b>MD-LOT</b>	Marine Directorate – Licensing Operations Team
<b>NPF</b>	National Performance Framework
<b>NPF4</b>	National Planning Framework 4
<b>NPV</b>	Net Present Value
<b>NSP</b>	Navigational Safety Plan
<b>O&amp;M</b>	Operation and Maintenance
<b>ONEC</b>	Onshore Export Cable Corridor
<b>ONS</b>	Office of National Statistics
<b>OnTI</b>	Onshore Transmission Infrastructure
<b>ORE</b>	Offshore Renewable Energy
<b>OSP</b>	Offshore Substation Platforms



<b>OWF</b>	Offshore Wind Farm
<b>OWPS</b>	Offshore Wind Policy Statement
<b>SCDS</b>	Supply Chain Development Statement
<b>SEIA</b>	Socio-Economic Impact Assessment
<b>TRSA</b>	Tourism and Recreation Study Area
<b>UK</b>	United Kingdom
<b>VMP</b>	Vessel Management Plan
<b>WTG</b>	Wind Turbine Generator

## Executive summary

This chapter of Volume 6 of the Environmental Impact Assessment Report assesses effects from the Proposed Development on socio-economics, tourism and recreation. This includes direct, indirect, cumulative, and transboundary effects. This chapter also discusses appropriate mitigation and monitoring as required to address any significant effects. The assessment looks at both the construction, operational and decommissioning of the Proposed Development, and is a combined assessment for both onshore and offshore.

The energy transition, and the development of the offshore wind sector in particular, has been identified as one of the key drivers of economic growth in the UK, and particularly in Scotland.

This assessment considers both the onshore and offshore activities of the Proposed Development. However, all of the receptors considered in this assessment are onshore. The receptors that are most sensitive to economic changes are the supply chains and economies of Aberdeenshire, the North of Scotland, Scotland and the UK. Tourism and recreation assets within the Aberdeenshire Tourism and Recreation Study Area and Caithness have also been identified as potential receptors.

The following impacts were identified as requiring assessment during the construction, operational and decommissioning phase of the Proposed Development:

- Economic Impacts, which include the employment and Gross Value Added (GVA) which is supported by the Proposed Development;
- Tourism Asset Impacts, which includes the secondary impacts on tourism and recreation receptors; and
- Social and Community Assets.

No embedded mitigation measures that are specific to socio-economics, tourism and recreation have been considered. However, the assessment in this chapter has multiple inter-related impacts, and the embedded mitigation measures relative to these chapters have been considered in the assessment. This includes the development and adherence to a Vessel Management Plan, Lighting and Marking Plan, Navigational Safety Plan and planting around the Onshore Substations.

In addition, the Proposed Development has also embedded enhancement measures to maximise the beneficial effects identified. This includes staff dedicated to managing supply chain and community interactions to maximise benefits and a series of investments outlined in the Supply Chain Development Statement that will increase the ability of local communities and companies to benefit from the Proposed Development.

No significant positive or negative effects have been identified on economic, social or tourism and recreation receptors. On balance, the economic impacts for the Proposed Development are expected to be positive.

During the construction phase the Proposed Development is expected to support:

- £238 million GVA and 3,283 years of employment in the North of Scotland (peaking at 1,035 jobs);
- £1.0 billion GVA and 14,864 years of employment in Scotland (peaking at 3,795 jobs); and
- £3.3 billion GVA and 47,790 years of employment in the UK (peaking at 11,591 jobs)

During the operational phase, the Proposed Development is expected to support:

- £26 million GVA and 348 jobs each year in the North of Scotland;
- £35 million GVA and 455 jobs in Scotland; and
- £52 million GVA and 697 jobs in the UK.

For both the construction phase and the operational phase, Caledonia North or Caledonia South on their own with a single onshore phase would generate approximately half of these jobs. The Proposed Development will also contribute to the just transition to net zero.

The residual effects of the Proposed Development will be the same as assessed due to embedded mitigation which precludes any requirement for secondary mitigation.

## 2 Socio-Economics, Tourism and Recreation

### 2.1 Introduction

- 2.1.1.1 This chapter of the Environmental Impact Assessment Report (EIAR) identifies the potential impacts and associated likely significant effects to socio-economics, tourism and recreation associated with the construction, operation and decommissioning of the Caledonia Offshore Wind Farm (OWF) covering both the offshore (marine) and onshore (terrestrial) environments. This chapter also discusses appropriate mitigation and monitoring as required to address any significant effects.
- 2.1.1.2 The Caledonia OWF comprises, Caledonia North and Caledonia South, collectively referred to as the Proposed Development (Offshore) and the Onshore Transmission Infrastructure (OnTI) required to transfer the power from the Proposed Development (Offshore) to a connection to the National Electricity Transmission System (NETS), referred to as the Proposed Development (Onshore).
- 2.1.1.3 Collectively, the Proposed Development (Offshore) and Proposed Development (Onshore) are referred to as the "Proposed Development".
- 2.1.1.4 This chapter is supported by Volume 7F, Appendix 2-1: Socio-Economics Technical Report. The technical report provides a description of the economic impact methodology and the data sources used to inform the socio-economic baseline.

### 2.2 Legislation, Policy and Guidance

- 2.2.1.1 Volume 1, Chapter 2: Legislation and Policy, of this EIAR sets out the policy and legislation associated with the Proposed Development.
- 2.2.1.2 Legislation, Policy and Guidance that relate to the socio-economics, tourism and recreation assessment are identified and described in Table 2-1.

Table 2-1: Legislation Policy and Guidance.

Relevant Legislation, Policy and Guidance	Description
Offshore Wind Sector Deal (United Kingdom (UK), 2019 <sup>1</sup> )	The Offshore Wind Sector Deal sets out the UK Government's aim to support the development of offshore wind energy generation in the UK and emphasise the benefit from the opportunities presented by the expansion of the sector.
National Performance Framework (Scottish Government, 2018 <sup>2</sup> )	Scotland's National Performance Framework (NPF) sets out the ambitions of the Scottish Government and provides a framework to give a rounded view of progress towards achieving sustainable and inclusive growth across Scotland.
National Planning Framework 4 (Scottish Government, 2023 <sup>3</sup> )	NPF4 sets out a national and strategic approach to planning and development in support of achieving net zero in Scotland by 2045.
Aberdeenshire Local Development Plan (Aberdeenshire Council, 2023 <sup>4</sup> )	Aberdeenshire Council's Policy C2 on renewable energy states that the council will support renewable energy developments at appropriate sites and of the appropriate design. Assessment should take into account effects on socio-economics as well as tourism and recreation.
National Strategy for Economic Transformation (Scottish Government, 2022 <sup>5</sup> )	The National Strategy for Economic Transformation sets out the Scottish Government's vision to create a wellbeing economy where society thrives across economic, social and environmental dimensions, and the opportunity the transition to net zero presents.
Offshore Wind Policy Statement (Scottish Government, 2020 <sup>6</sup> )	The Offshore Wind Policy Statement highlights the importance of offshore wind in the transition to net zero.
Defining 'local areas' for assessing the economic impact of offshore renewables and other marine developments: guidance principles (Scottish Government, 2022 <sup>7</sup> )	This document outlines principles for defining the 'local area' on land that may be affected by large marine developments like offshore wind farms. This guidance is aimed at supporting the creation of economic impact assessments for such developments. The document reviews methodologies for defining local areas, proposes a set of principles based on these findings, and provides examples of how to apply these principles in real-world scenarios. The

Relevant Legislation, Policy and Guidance	Description
	guidance serves as a tool for developers and decision-makers to standardise the assessment of local impacts of marine developments, ensuring consistent, comparable, and practical evaluations.
General Advice for Offshore Socio-Economic Impact Assessment (SEIA) (Marine Analytical Unit, 2022 <sup>8</sup> )	Provides advice on assessing socio-economic impacts for offshore development, including the social impacts that should be considered and how they should be assessed as well as how economic impacts should be assessed. This includes taking account of factors such as deadweight, leakage, displacement and economic multipliers. Advice is also given on how social impacts should be assessed provided ports are known.
The Green Book: Appraisal and Evaluation in Central Government (HM Treasury, 2022 <sup>9</sup> )	Provides guidance on assessing economic impacts, including deadweight, displacement, discounting etc.

## 2.3 Stakeholder Engagement

### 2.3.1 Overview

2.3.1.1 The Offshore Scoping Report was submitted to Marine Directorate - Licensing Operations Team (MD-LOT)<sup>i</sup> in September 2022 (Volume 7, Appendix 2: Offshore Scoping Report), who then circulated the report to relevant consultees. A Scoping Opinion was received from MD-LOT on 13 January 2023 (Volume 7, Appendix 3: Offshore Scoping Opinion). The Onshore Scoping Report was submitted to Aberdeenshire Council in December 2022 (Volume 7, Appendix 1: Onshore Scoping Report), who then circulated the report to relevant consultees. A Scoping Opinion was received from Aberdeenshire Council on 1 February 2023 (Volume 7, Appendix 4: Onshore Scoping Opinion). Relevant comments from the Scoping Opinion specific to socio-economics, tourism and recreation are provided in Table 2-2.

<sup>i</sup> In 2023, Marine Scotland was renamed Marine Directorate, and thus the marine licensing and consents team is now referred to as Marine Directorate - Licensing Operations Team (MD-LOT). Marine Scotland Science is now referred to as Marine Directorate - Science, Evidence, Digital and Data (MD-SEDD).

Table 2-2: Scoping Opinion Response.

Consultee	Comment	Response
Marine Directorate Marine Analytical Unit (MAU) Scoping Opinion	With regards to the study area identified in section 17.2 of the Scoping Report, the Scottish Ministers advise that the local study area may be too large to enable sufficiently granular analysis for certain socio-economic impacts. The Applicant should refer to Annex 1 of the MAU advice and consider how to define the impact area in line with this.	The study areas for different geographic areas have been defined separately for different socio-economic impacts, in line with Scottish Government guidance <sup>10</sup> . This includes areas smaller than the North of Scotland study area. Study areas are discussed in Section 2.4.1.
Marine Directorate MAU Scoping Opinion	The socio-economic baseline in the EIAR should be expanded from what has been provided in the Scoping Report to include measures of education and company size, income inequality.	The socio-economic baseline has been expanded from the content of the Scoping Reports. This includes education, company size and income inequality. The socio-economic baseline is provided in Section 2.4.3.
Marine Directorate MAU Scoping Opinion	More details to be provided on stakeholder engagement, including the in-person consultation events	Details of the stakeholder engagement programme are provided in Volume 1, Chapter 8: Stakeholder Engagement and Consultation Summary and Application Document 1: Pre-Application Consultation Report.
Marine Directorate MAU Scoping Opinion	Both positive and negative impacts should be considered throughout the assessment, including the potential for the development to have negative impacts on other sectors.	This chapter incorporates the findings of other chapters to identify any potential positive and negative impacts on other sectors.

Consultee	Comment	Response
Marine Directorate MAU Scoping Opinion	The assessment should include an assessment of the wider social impacts associated with the economic impacts identified, including knock on impacts of demographic changes.	The assessment of social impacts, including service provision is considered in Section 2.7
Marine Directorate MAU Scoping Opinion	Would like to see primary social research with communities likely to be impacted, with engagement by professional researchers, to assess potential socio-cultural impacts.	Local ports are not known at this stage and therefore no primary social research was possible. However, the logic for socio-cultural impacts is considered in Section 2.7 along with potential variations between impacts depending on the characteristics of the communities impacted.
Marine Directorate MAU Scoping Opinion	More details on the methodology applied to the economic impact assessment are provided.	The methodology for the economic impact assessment is provided in Volume 7F, Appendix 2-1: Socio-economics Technical Report.
Highland Council Scoping Opinion	The EIAR should estimate who may be affected by the development, in all or in part, which may require individual households to be identified, local communities or a wider socio-economic groupings such as tourists and tourist related businesses, recreational groups, economically active, etc. The application should include relevant economic information connected with the project, including the potential number of jobs, and economic activity associated with the procurement, construction, operation and decommissioning of the development.	The local economic effects are considered for the North of Scotland for the wider Proposed Development. These are described in Section 2.7. The key epicentres of impact, including the primary ports for the construction and operations, have not been identified at the time of the assessment and therefore it has not been possible to identify individual households or communities that are impacted.



Consultee	Comment	Response
Aberdeenshire Council	<p>"Examples of the types of issues that should be addressed include:</p> <ul style="list-style-type: none"> <li>▪ Local Economic Effect</li> <li>▪ Tourism and Recreation, including Footpaths Proposed Mitigation Measures"</li> </ul>	<p>The local economic effects are considered for Aberdeenshire for the OnTI and for the North of Scotland for the wider Proposed Development. These are described in Section 2.7.</p> <p>The impact on tourism and recreation assets are also considered in Section 2.7. This considers which receptors could be impacted by other environmental effects from the Proposed Development and how this could change visitor behaviour. The mitigation measures that are relevant for these environmental effects are listed in their respective chapters.</p> <p>Recreational trails and footpaths are considered in Volume 5, Chapter 9: Traffic and Transport</p>

2.3.1.2 Further consultation has been undertaken throughout the pre-application stage. Table 2-3 summarises the consultation activities carried out relevant to socio-economics, tourism and recreation.

Table 2-3: Stakeholder Engagement Activities.

Date	Consultee and Type of Consultation	Summary
15/08/2023	Marine Analytical Unit Virtual Meeting	Meeting to discuss the Scoping Opinion received from the MAU. This meeting discussed the approach to defining study areas, primary data collection and the scoping of impacts.
13/03/2024	Caledonia Quarterly Meeting with MD-LOT Virtual Meeting	Request for MD-LOT to provide an update regarding change of MAU position and scoping request for more recent OWF scoping submissions and no longer requiring primary data collection. Advice to proceed based on approach used by other projects seeking consent, noting a strategic industry level project to carry out data collection is being launched in 2024.
06/06/2024	Aberdeenshire Council Virtual Meeting	Meeting to discuss the methodology proposed for the socio-economic impact assessment and to identify any additional social or economic impacts to be scoped into the assessment.

## 2.4 Baseline Characterisation

### 2.4.1 Study Area

2.4.1.1 The socio-economics, tourism and recreation study areas for the assessment of the Proposed Development's effects on employment and economy onshore study areas have been defined in line with the guidance on identification of 'local areas' for the offshore developments published by the Scottish Government (Scottish Government, 2022<sup>11</sup>).

2.4.1.2 This guidance identifies six principles for identifying study areas for offshore renewables and other marine developments. The principles consider the main locations of where socio-economic impacts will occur. The principles are:

- Principle 1 (Dual Geographies) - The local area for the supply chain and investment impacts should be separate from the local area(s) for wider socio-economic impacts, including tourism and recreation;
- Principle 2 (Appropriate Impacts) - The appropriate impacts to be considered for assessments should be identified before defining the local areas;
- Principle 3 (Epicentres) - The local areas should include all the epicentres of the appropriate impacts;
- Principle 4 (Accountability) - The local areas used in the assessment should comprise of pre-existing economic or political geographies (community councils, local authorities, development agencies) to enhance accountability;
- Principle 5 (Understandable) - The local areas should be defined in such a way that they are understandable to the communities they describe; and
- Principle 6 (Connected Geography) - The local area for the supply chain and investment impacts should consist of connected (including coastal) pre-existing economic or political geographies.

2.4.1.3 In line with this guidance, the study areas for the socio-economic impacts are different from those used for the assessment of tourism and recreation impacts.

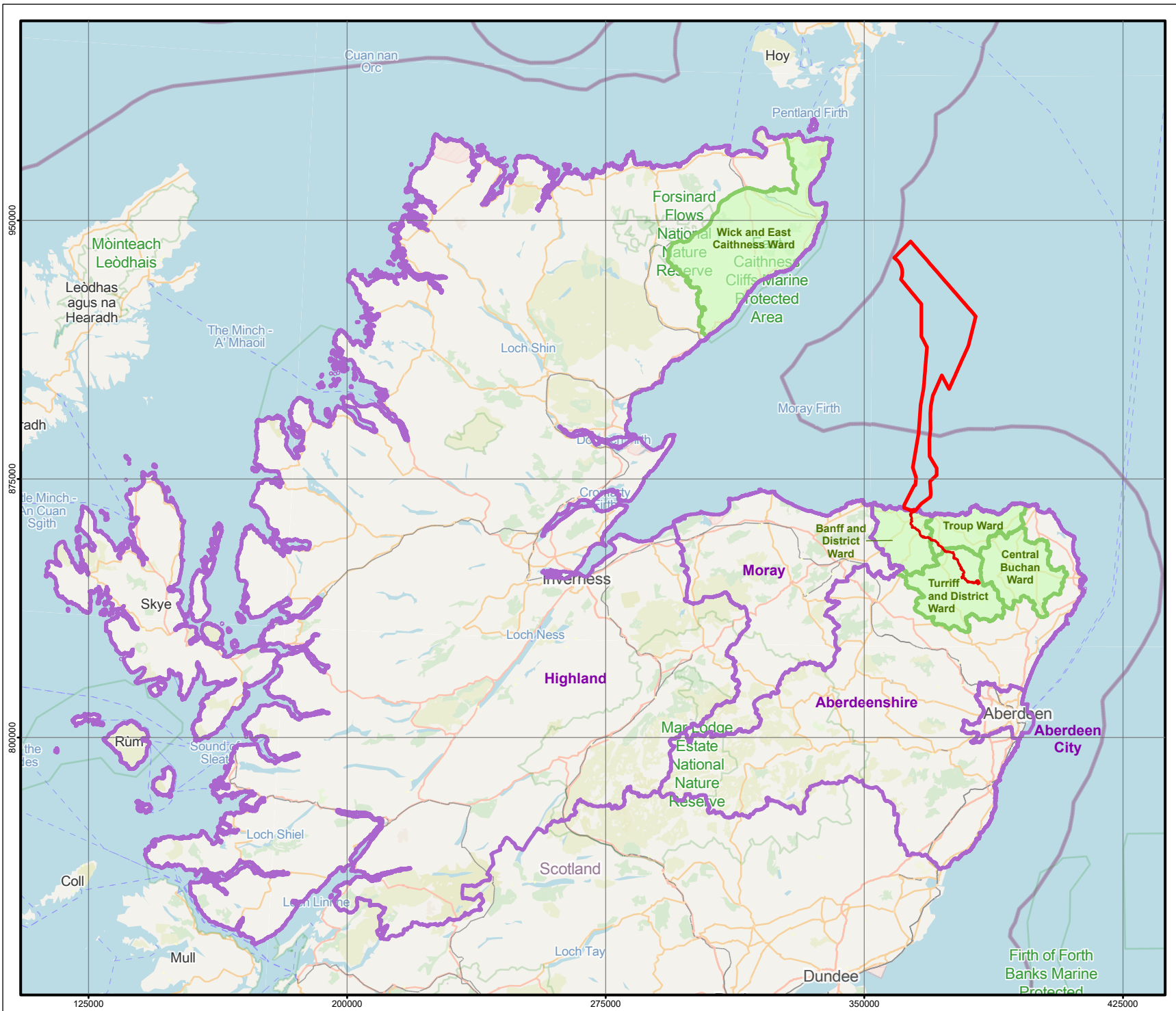
2.4.1.4 The socio-economic study area is the smallest connected geography area that will include all likely epicentres of impact, such as sites for OnTI construction and the likely location of the key port locations in the UK.

2.4.1.5 The location of the OnTI is known and will be in Aberdeenshire. However, the location of the primary ports, such as the main construction or Operation and Maintenance (O&M) ports, is not known. It is assumed that these ports will be based in the North of Scotland.

- 2.4.1.6 Therefore, the socio-economic impacts will be assessed at the following areas:
- Aberdeenshire (for the OnTI elements only);
  - North Scotland, defined as the local authorities of Aberdeen City, Aberdeenshire, Highland, and Moray;
  - Scotland; and
  - the UK.
- 2.4.1.7 For tourism and recreation, the assessment will focus on the local administrative areas that contain the OnTI and areas experiencing visual impacts as identified in Volumes 2, 3 and 4, Chapter 12: Seascape, Landscape and Visual Impact Assessment.
- 2.4.1.8 The OnTI is located in the Aberdeenshire Council area. This local authority covers a large geography and, therefore, the Aberdeenshire Tourism and Recreation Study Area (TRSA) has been based on the electoral wards that the onshore cable corridor is expected to pass through:
- Banff and District;
  - Central Buchan;
  - Troup; and
  - Turriff and District.
- 2.4.1.9 Significant visual impacts have been identified on the north east coast of Highland. As this is a large area, the analysis has focused on the electoral ward of Wick and East Caithness. This is referred to as the Caithness Tourism and Recreation Study Area (TRSA) The study areas used for assessing the onshore and offshore elements are presented in Table 2-4. A map of the study areas is shown in Figure 2-1.

Table 2-4: Onshore and Offshore Study Areas.

Study Area	Onshore	Offshore
Aberdeenshire	x	
Aberdeenshire TRSA	x	x
Caithness TRSA		x
North Scotland		x
Scotland	x	x
UK	x	x



**Proposed Development**  
**North Scotland Council**  
**Tourism and Recreation Study Area (TRSA)**

Local Unitary Authority and District Borough Unitary Wards sourced from Ordnance Survey. Contains OS data © Crown Copyright and database right 2024. Service Layer Credits: Map data © OpenStreetMap contributors, Microsoft, Facebook, Inc. and its affiliates, Esri Community Maps contributors, Map layer by Esri.

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0 10 20 30 40 50 km

04	10/09/2024	Approved	CW	JN	GS
03	20/08/2024	For Review	CW	JN	GS
02	25/07/2024	For Review	AC	JN	GS
01	21/06/2024	For Review	CW	JN	GS
REV	DATE	DOC STATUS	ORIGIN	REVIEW	APP

**CALEDONIA**  
Offshore Wind Farm

**ARUP**

CONTRACTOR DRAWING NO  
UKCAL1 ARP\_WNF\_ENV\_MAP\_00501

CONTRACTOR REV  
04

GEODETIC PARAMETERS  
OSGB36 / British National Grid (EPSG:27700)

DRAWING TITLE  
**Figure 2-1:  
Socioeconomics, Tourism  
and Recreation Study Area**

STATUS  
Approved

SCALE  
1:1,500,000

DRAWING NUMBER  
N/A

SHEET NO  
01 of 01

REV  
N/A

## 2.4.2 Data Sources

2.4.2.1 The data sources that have been used to inform this socio-economic, tourism and recreation baseline are presented below.

2.4.2.2 In addition to data provided by the Applicant, its previous experience in generating economic impacts through Moray East and Moray West Offshore Wind Farms in the North Sea (Ocean Winds, 2024) and BiGGAR Economics expertise, the sources that used in this assessment include:

- Mid-2022 Electoral Ward Population Estimates (National Records of Scotland, 2023<sup>12</sup>);
- 2018-based principal population projections for council areas (National Records of Scotland, 2019<sup>13</sup>);
- Business Register and Employment Survey 2022 (Office for National Statistics (ONS) 2023<sup>14</sup>);
- Annual Business Survey 2020 (ONS, 2022<sup>15</sup>);
- Annual Survey of Hours and Earnings 2023 (ONS, 2023<sup>16</sup>);
- Population Estimates - local authority based by five-year age band (ONS, 2022<sup>17</sup>);
- Principal Population Projections 2018-based (ONS, 2020<sup>18</sup>);
- GB Day Visitor Survey 2019 (Kantar TNS, 2020<sup>19</sup>);
- The GB Tourism Survey 2019 (Kantar TNS, 2020<sup>20</sup>);
- International Passenger Survey (ONS, 2020<sup>21</sup>);
- People Skills Survey 2021 – 2026 (Offshore Wind Industry Council, 2021<sup>22</sup>);
- Collaborating for Growth: Strategies for Expanding the UK Offshore Wind Supply Chain (Offshore Wind Industry Council, 2020<sup>23</sup>);
- Guidance on assessing the socio-economic impacts of OWFs (Oxford Brookes University, 2020<sup>24</sup>);
- Offshore Wind O&M a £9 billion per year opportunity by 2030 for the UK to seize (Offshore Renewable Energy (ORE) Catapult, 2020<sup>25</sup>); and
- Guide to an OWF (BVG Associates, 2019<sup>26</sup>).

### Site-specific Surveys

2.4.2.3 No site-specific surveys have been undertaken to inform the socio-economics, tourism and recreation chapter. This is because socio-economic impacts are determined by the level of expenditure, receptors would be assessed based on desktop surveys and construction, operation and maintenance ports are not known at this stage.

## 2.4.3 Socio-Economics Baseline Description

2.4.3.1 This section presents baseline statistics for each of the socio-economic study areas, including Aberdeenshire, North of Scotland, Scotland and the UK.

### Population

2.4.3.2 As shown in Table 2-5(National Records of Scotland, 2023<sup>12</sup>; ONS, 2023<sup>17</sup>). Aberdeenshire as a whole had a population of 262,700 and North Scotland had a population of 824,600, accounting for 4.8% and 15.0%, respectively, of Scotland’s total population of 5,479,900.

2.4.3.3 The share of the population accounted for by working age people (aged between 16-64) in Aberdeenshire was 61.1% in 2022. This lower than in North Scotland (62.9%), Scotland (63.8%) and the UK as a whole (62.8%).

2.4.3.4 The share of the population accounted for by people aged 65 and over was 20.4% in Aberdeenshire, similar to the share of 20.3% in North Scotland, 19.6% in Scotland and higher than the UK as a whole (18.8%).

Table 2-5: Population, 2022.

Group	Aberdeenshire	North Scotland	Scotland	UK
Total	262,700	824,600	5,479,900	67,652,999
0-15	18.5%	16.8%	16.6%	18.4%
16-64	61.1%	62.9%	63.8%	62.8%
65+	20.4%	20.3%	19.6%	18.8%

### Economic Activity and Pay

2.4.3.5 As Table 2-6 shows, in 2022/23, the economic activity rate in Aberdeenshire was 83.4%, higher than the rate across North Scotland (78.9%), Scotland (77.9%) and the UK as a whole (78.7%)<sup>27</sup>.

2.4.3.6 The unemployment rate in Aberdeenshire (1.7%, which includes residents who commute into Aberdeen) was lower than that in the North of Scotland (3.0%), the Scottish average (3.4%) and the UK average (3.8%).

2.4.3.7 At £29,666, the median annual gross income of residents of Aberdeenshire is comparatively higher than North Scotland as a whole, for which the median annual gross income is £29,328, but slightly lower than Scotland as a whole (£29,842) and similar to the entirety of the UK (£29,669) (ONS, 2023<sup>16</sup>).

2.4.3.8 The level of income inequality, as defined by the ratio of hourly pay between the 80<sup>th</sup> percentile and the 20<sup>th</sup> percentile of earners, is marginally higher in both Aberdeenshire and the North of Scotland (2.2) than across Scotland or the UK as a whole (2.1). Between 2013 and 2023, this measure of the level of income inequality has decreased in all study areas. The greatest decrease was in Aberdeenshire, where this measure of income inequality has decreased from 2.5 in 2013 to 2.2 in 2023.

Table 2-6: Economic Activity, 2022.

<b>Economic Indicator</b>	<b>Aberdeenshire</b>	<b>North Scotland</b>	<b>Scotland</b>	<b>UK</b>
Economic Activity Rate (%)	83.4%	78.9%	77.9%	78.7%
Unemployment Rate (%)	1.7%	3.0%	3.4%	3.8%
Median Annual Gross Income (resident)	£29,666	£29,328	£29,842	£29,669
80/20 Income Ratio (2023)	2.2	2.2	2.1	2.1
80/20 Income ratio (2013)	2.5	2.3	2.3	2.4

## Industrial Structure

2.4.3.9 As shown in Table 2-7, 111,725 people were employed across Aberdeenshire (ONS, 2023<sup>14</sup>), which includes both residents and workers based in Aberdeenshire. Within Aberdeenshire, the highest share of employment is associated with wholesale and retail trade (13.0%). This is followed by agriculture, forestry and fishing (11.6%) and manufacturing (11.6%), reflecting the importance of fishing and fish processing to the economy of Aberdeenshire.

2.4.3.10 There may be contracts in the construction sector such as groundworks and building, supporting economic impact. Employment in this sector within the Aberdeenshire is higher than average, accounting for 8,000 jobs (7.2%), 25,000 in North Scotland (5.7%) and 148,000 in Scotland as a whole (5.6%). In the UK, the sector employs 1.6 million or 5.0% of employment.

2.4.3.11 Across Aberdeenshire, employment in professional, scientific and technical activities (10.7%) and mining and quarrying (2.7%) are higher than the UK average as a result of the offshore oil and gas sector. Professional, scientific and technical activities account for 7.4% of employment in Scotland and 9.1% of employment across the UK. Mining and quarrying accounts for 1.0% and 0.1% of employment in Scotland and the UK, respectively.



Table 2-7: Industrial Structure, 2022.

Industry	Aberdeenshire	North Scotland	Scotland	UK
Wholesale and retail trade	13.0%	12.1%	12.8%	13.9%
Agriculture, forestry and fishing	11.6%	6.9%	3.4%	1.5%
Manufacturing	11.6%	7.5%	6.6%	7.4%
Professional, scientific and technical activities	10.7%	9.2%	7.4%	9.1%
Human health and social work activities	8.5%	14.0%	15.1%	13.2%
Education	8.1%	7.2%	8.4%	8.3%
Construction	7.2%	5.7%	5.6%	5.0%
Accommodation and food service activities	6.7%	9.0%	8.2%	7.9%
Administrative and support service activities	4.9%	6.0%	7.8%	8.8%
Transportation and storage	3.6%	3.9%	4.0%	5.0%
Public administration and defence	3.1%	4.3%	6.2%	4.5%
Mining and quarrying	2.7%	5.4%	1.0%	0.1%
Arts, entertainment and recreation	2.7%	2.7%	2.9%	2.4%
Information and communication	1.5%	1.8%	3.1%	4.4%
Other service activities	1.3%	1.3%	1.7%	2.0%
Real estate activities	0.9%	1.0%	1.4%	2.0%
Water supply	0.7%	0.8%	0.7%	0.7%
Financial and insurance activities	0.7%	0.7%	3.1%	3.3%
Electricity, gas, steam and air conditioning supply	0.6%	0.5%	0.7%	0.4%
<b>Total (headcount)</b>	<b>111,725</b>	<b>4398,385</b>	<b>2,621,000</b>	<b>31,921,800</b>

## Company Sizes

2.4.3.12 There were 34,165 companies across the North of Scotland, including 12,615 in Aberdeenshire<sup>28</sup>. The size of the companies was broadly similar to the size of the companies across Scotland and the UK (Table 2-8). In Aberdeenshire, a greater proportion of companies are considered Micro (90%) because they employ less than 10 people.

Table 2-8 Company Size by Employee Number.

	Aberdeenshire	North Scotland	Scotland	UK
Micro (less than 10)	90%	88%	87%	89%
Small (10 to 49)	8%	10%	11%	9%
Medium (50 – 249)	1%	2%	2%	2%
Large (250+)	<1%	<1%	<1%	<1%
<b>Total</b>	<b>12,615</b>	<b>34,165</b>	<b>171,350</b>	<b>2,726,830</b>

## Gross Value Added (GVA) by Area

2.4.3.13 In 2021, the GVA (a measure of economic output that is typically estimated by subtracting non-operational costs from turnover) generated within Aberdeenshire was £6.6 billion and the GVA generated by North Scotland was £24.7 billion, accounting for 4% and 16% of the GVA generated by Scotland (£149.9 billion), respectively. GVA generated across the UK in the same year was £2,040.5 billion (Table 2-9) (ONS, 2024<sup>29</sup>).

2.4.3.14 The same year, GVA per head of population supported in Aberdeenshire was £25,051 and across North Scotland GVA per head was £29,902. Scotland generated £27,361 GVA per head and the UK generated £30,443 GVA per head.

2.4.3.15 Over the period since 2011, GVA in Aberdeenshire has grown by 13% and GVA in North Scotland has grown by 11%, both slower rates of growth when compared to both Scotland (+30%) and the UK overall (+37%).

Table 2-9: GVA and GVA per Head, 2021.

	Aberdeenshire	North Scotland	Scotland	UK
2011 GVA (£ billion)	£5.8	£22.3	£115.6	£1,485.9
2021 GVA (£ billion)	£6.6	£24.7	£149.9	£2,040.5
Change (2011-2021)	13%	11%	30%	37%
GVA per Head 2021 (£)	£25,051	£29,902	£27,361	£30,443

## Housing

- 2.4.3.16 The affordability and availability of housing in an economy contribute to its sensitivity to change and ability to accommodate new people. Housing is more expensive in Aberdeenshire when compared to North Scotland and Scotland as a whole (Table 2-10). The mean residential property price in Aberdeenshire in 2023 was £231,160 compared North Scotland (£210,833) and Scotland as a whole (£216,328)<sup>30</sup>. Housing in Aberdeenshire, North Scotland and Scotland is relatively less expensive than across the UK as a whole, where the mean residential property price was £330,429 in 2023.
- 2.4.3.17 Between 2013 and 2023, the value of housing in Aberdeenshire increased by 7%, lower than the increase in North Scotland (11%), Scotland (38%) and the UK (32%).
- 2.4.3.18 In 2021, there were a total of 13,019 dwellings in Aberdeenshire and 55,710 dwellings in North Scotland, accounting for 2% and 9% of the total 636,738 dwellings across Scotland as a whole (Scottish Government, 2024<sup>31</sup>). There were 28,203,000 dwellings in the UK the same year (Stats Wales, 2022<sup>32</sup>; Northern Ireland Department of Finance, 2022<sup>33</sup>; UK Parliament, 2022<sup>34</sup>).

Table 2-10: House Price Values and Changes.

	Aberdeenshire	North Scotland	Scotland	UK
Mean Residential Property Price 2013	£216,225	£189,830	£156,795	£251,000
Mean Residential Property Price 2023	£231,160	£210,833	£216,328	£330,429
Change	7%	11%	38%	32%
Housing Stock 2021	13,019	55,710	636,738	28,203,000

## Pupil Teacher Ratios

- 2.4.3.19 As a measure of existing pressure on educational provision, the analysis considered the ratio of pupils to teachers in primary and secondary education.
- 2.4.3.20 In Aberdeenshire in 2023, there were 14 primary students for every primary teacher (Table 2-11) (Scottish Government, 2023<sup>35</sup>). This is similar to North Scotland (14) and slightly below the Scottish average, where there are 15 primary pupils per teacher.
- 2.4.3.21 The same year, there were 12 secondary school pupils for every teacher in Aberdeenshire. This is slightly higher than North Scotland (11) and comparable to Scotland as a whole (12).

Table 2-11: Ratio of Pupils to Teachers.

School Stage	Aberdeenshire	North Scotland	Scotland
Primary	14	14	15
Secondary	12	11	12

## Healthcare Provision

- 2.4.3.22 The provision of health care in Aberdeenshire is primarily covered by the National Health Service. Within Aberdeenshire, there were 210 GPs in 2021 (Public Health Scotland, 2021<sup>36</sup>), serving a population of 262,700 (Table 2-12). This is equivalent to 1,251 patients per GP (Table 2-12), which is higher than North Scotland (986) and Scotland (1,055) and the UK as a whole (1,230) (OECD, 2024<sup>37</sup>).

Table 2-12: Metrics for Healthcare Provision.

Healthcare Indicator	Aberdeenshire	North Scotland	Scotland	UK
Patients per GP	1,251	986	1,055	1,230

## Life satisfaction and Wellbeing

- 2.4.3.23 Wellbeing Adjusted Life Years (WELLBYs) provide a consistent and robust metric that can be used to measure wellbeing across time and geography. They are calculated by multiplying a subjective wellbeing score (measured by life satisfaction) by average life expectancy. Reliable statistics for both are available at local authority level, which enabled us to estimate WELLBYs for each local authority area in the UK (BiGGAR Economics, 2023<sup>38</sup>).
- 2.4.3.24 This shows that wellbeing in general is higher in Aberdeenshire and North Scotland than both Scotland and the UK as a whole. Self-reported life

satisfaction in both Aberdeenshire and North Scotland is 7.6 (out of 10), compared to 7.4 in Scotland as a whole and 7.5 in the UK. Overall the Wellby score for Aberdeenshire is 613.2, compared to 587.0 for Scotland as a whole. This is shown in Table 2-13.

Table 2-13: Elements of Wellbeing Adjusted Life Years.

Wellbeing Indicator	Aberdeenshire	North Scotland	Scotland	UK
Life satisfaction	7.6	7.6	7.4	7.5
Life Expectancy	80.7	80.0	78.9	80.2
Wellby	613.2	604.0	587.0	598.4

## 2.4.4 Tourism and Recreation Baseline Description

2.4.4.1 The tourism and recreation baseline outlines the scale of the tourism economy and identifies key attractions in the area. This includes an overview of visitor numbers and their spend and key attractions within the Aberdeenshire TRSA and Caithness TRSA.

### Sustainable Tourism GVA and Employment

2.4.4.2 In its economic strategy the Scottish Government identified six sectors as growth sectors, that is, economic sectors where Scotland had a comparative advantage. One of these sectors is tourism, which is referred to as 'Sustainable Tourism' by the Scottish Government. Sustainable tourism, which includes a number of sub-sectors such as accommodation and some types of food and beverage services, was one of the sectors identified (Scottish Government, 2022<sup>39</sup>).

2.4.4.3 In 2022, the sector accounted for 7.7% of employment in the Caithness TRSA, substantially lower than for Highland as a whole (13.4%) and lower than in Scotland (8.7%). The sector employed 1,165 people in the Aberdeenshire TRSA (8.5%), higher than for Aberdeenshire as a whole (7.5%) and similar to Scotland.

2.4.4.4 Employment in the sustainable tourism was 8,430 people Aberdeenshire, accounting for 3.7% of the total employment of 228,0250 in the sustainable tourism sector across Scotland.

Table 2-14: Sustainable Tourism: Employment, 2022.

Sustainable Tourism	Caithness TRSA	Highland	Aberdeenshire TRSA	Aberdeenshire	Scotland
Employment	355	17,120	1,165	8,430	228,250
Share of total employment	7.7%	13.4%	8.5%	7.5%	8.7%

## Visits and Spend of Tourists

- 2.4.4.5 Data on tourists and tourism spending is available from various sources, including the GB Day Visitor Survey (Kantar TNS, 2020<sup>40</sup>), the GB Tourism Survey (Kantar TNS, 2022<sup>41</sup>), and the International Passenger Survey (Kantar TNS, 2022<sup>42</sup>), for which data is averaged over a three-year period (2017-2019). Data was not available at the level of electoral wards, so visitor numbers and spending for Highland and Aberdeenshire were included.
- 2.4.4.6 Table 2-15 shows that in 2019 there were 14 million visits to Highland, accounting for 9% of all visits to Scotland. Total spending was around £1.1 billion, equal to around 10% of spending in Scotland, primarily made of domestic overnight visitors, who contributed 44% of spending.
- 2.4.4.7 In 2019, there were 7 million visits to Aberdeenshire, accounting for around 4% of all visits to Scotland as a whole. Total spending in Aberdeenshire was £245 million, equivalent to 2% of spending across Scotland as a whole. Day visitor spending in Aberdeenshire accounted for 66% of the total spend in the area.

Table 2-15: Visits and Visitor Spending, 2019.

Visits/Spend	Highland	Aberdeenshire	Scotland	UK
<b>Visits (millions)</b>				
Day Visitors	12	6	145	1,795
Domestic Overnight	2	<1	12	121
International Overnight	1	<1	4	40
<b>Total Visits</b>	<b>14</b>	<b>7</b>	<b>161</b>	<b>1,957</b>
<b>Spending (£ millions)</b>				
Day Visitors	413	161	5,186	58,623
Domestic Overnight	492	52	2,989	24,099
International Overnight	205	32	2,459	27,413
<b>Total Spend</b>	<b>1,110</b>	<b>245</b>	<b>10,634</b>	<b>110,135</b>

Note: totals may not sum due to rounding.

## Regional Tourist Attractions

2.4.4.8 VisitScotland collects a list of the ten most popular visitor attractions by regional area (Visit Scotland, 2024<sup>43</sup>). Of the top ten most visited attractions in the Grampian region, four are in Aberdeenshire, four are in Aberdeen, and two are in Moray. One of these major attractions is located within 10km of the Proposed Development. Fyvie Castle, which receives 66,039 visitors each year, is located 7km from the Onshore Export Cable Corridor (ONEC). The remaining nine attractions are all located over 28km from the Proposed Development (Onshore).

Table 2-16: Top Visitor Attractions, Aberdeenshire.

Attraction	Description	Distance from ONEC
Fyvie Castle	800-year-old fortress featuring 13 <sup>th</sup> century art and managed grounds	7km
Bennachie Forest	Forest where visitors can use various recreational trails and view local wildlife	29km
Castle Fraser	15 <sup>th</sup> century tower house with a collection of portraits	34km
Crathes Castle	16 <sup>th</sup> century castle with a historic walled garden	50km

2.4.4.9 While there are no available statistics on the most popular attractions in Caithness, some of the most visited places have been presented below. This include the North Coast 500, a route around northern Scotland’s coast line, and Dunnet Head/John O’Groats, which represent two of Scotland’s most northerly points.

Table 2-17: Top Visitor Attractions, Caithness.

Attraction	Description
North Coast 500	A 500-mile coastal route around the north coast of Scotland, which includes Caithness as well as five other areas.
Dunnet Head	The most northerly point in the UK and a nature reserve.
John O’Groats	The most north-eastern point in Scotland and as far as possible from Land’s End in Cornwall.
Castle of Mey	The castle and gardens of the former Queen Mother.

## Local Tourist Attractions

2.4.4.10 To identify attractions within the Aberdeenshire TRSA, various online sources which list popular attractions were used, including VisitScotland (Visit Scotland, 2024<sup>44</sup>), Historic Environment Scotland (Historic Environment Scotland, 2024<sup>45</sup>) and Visit Aberdeenshire 2024 (Visit Aberdeenshire, 2024<sup>46</sup>). Table 2-18 lists the major attractions located within the Aberdeenshire TRSA, a short description of each, and their distance from the Proposed Development (Onshore).



Table 2-18: Aberdeenshire TRSA Attractions.

Attraction	Description	Approximate Distance from ONEC
North East Shooting Breaks	Shooting range offering guided goose shooting, duck shooting and roe deer stalking experiences	<1km
The Boyndie Visitor Centre	Six acres of gardens and woodland featuring various recreational trails, as well as a gift shop and garden centre	<1km
Inchdrewer Castle	A 16th century tower house which looks across to Banff Bay	<1km
Eden Castle	A ruined tower house built in 1577	1km
Boyne Castle	Ruins of a 16 <sup>th</sup> century quadrangular castle	2km
Delgatie Castle	Castle originally constructed in 1030	2km
Banff Harbour Marina	A recreational harbour which hosts small fishing boats and pleasure craft	4km
Banff Castle	A ruined 12th century former royal castle	5km
Duff House	Country house containing collections of furniture and art	5km
Duff House Royal Golf Club	Golf course which looks out on to the Moray Firth	5km
Museum of Banff	Museum founded in 1828 featuring displays of Banff silver	5km
St Mary's Parish Church	Large church built in 1790 located in the South of Banff	5km
Turriff Golf Club	Eighteen-hole golf course which hosts events and competitions	5km
Macduff Marine Aquarium	Aquarium showcasing Scotland's sea creatures and underwater habitats	6km
New Deer Showground	Annual two-day agricultural show displaying the products and skills of the hundreds of exhibitors and local business	7km

Attraction	Description	Approximate Distance from ONEC
Fyvie Castle	800-year-old fortress featuring 13 <sup>th</sup> century art and managed grounds	7km
Suds Surf School	Water sports centre providing classes in surfing, bodyboarding and stand-up paddleboarding	8km
Sandend Beach	Broad sandy beach located in the small fishing village of Sandend	8km
Haddo House	Stately home featuring Georgian architecture, Victorian interiors, and a terraced garden surrounded by 80 hectares of grounds	10km

2.4.4.11 Due to the nature of the effects, which arise from the visual impacts of the Proposed Development, the assessment has focused on attractions located on the coast between Whaligoe and Keiss. These have been identified based on a review of VisitScotland (Visit Scotland, 2024<sup>47</sup>) and Venture North (Venture North, 2024<sup>48</sup>).

Table 2-19: Caithness TRSA Coastal Attractions.

Attraction	Description
Whaligoe Steps	A set of steps cut into the cliff face, which was previously used to bring up fish from the natural harbour. There is a small cafe at the top.
Keiss Castle	A historic ruined castle perched on the coast. There is no visitor centre of other facilities.
Pulteney Distillery	A whisky distillery with a visitor centre based in Wick.
Castle Sinclair	An abandoned castle located on Sinclair bay, three miles north of Wick. There is no visitor centre of other facilities.
Wick heritage Museum	A museum that presents the local history of Wick.

## 2.4.5 Future Baseline/Do Nothing Scenario

2.4.5.1 If the Proposed Development does not come forward, an assessment of the future baseline conditions has also been carried out and is described within this section.

2.4.5.2 The main focus is on population, which is a good indicator of long-term

economic potential, and for which there are robust projections. Population projections are available at the local authority level in Scotland (National Records of Scotland, 2019<sup>13</sup>), as well as for the UK as a whole (ONS, 2020<sup>49</sup>). A critical aspect of these demographic changes is the shift in the working-age population, defined as individuals aged 16 to 64, as this partly reflects economic opportunities.

2.4.5.3 As shown in Table 2-20, during the period between 2022 and 2043, the working age population of Aberdeenshire is expected to reduce by 4.5%, with an overall reduction of 7,216 working age people. This is equivalent to an annual reduction of 360 working age of people. North Scotland is also projected to witness a decrease in its working age population, with an expected decline of around 26,700 individuals, representing a reduction of 5.2%. This is a more marked change compared to Scotland as a whole, for which the working age population is projected to decrease by 3.8% during this period, representing 133,500 fewer individuals. This contrasts with the overall UK trend, where the working-age population is forecasted to rise by 0.4%.

2.4.5.4 The anticipated reduction the working age populations of Aberdeenshire and Scotland presents a challenge to economic and labour market stability. Without effective measures to attract and retain a skilled workforce, Scotland may face a workforce shortage. The growth of sectors that provide high quality jobs will therefore be an important driver of the population trends and economic performance of Aberdeenshire and Scotland.

Table 2-20: Population Projections by age (2018-2043).

Group	Aberdeenshire		North Scotland		Scotland		UK	
	2022	2043	2022	2043	2022	2043	2022	2043
Total (000s)	262.7	267.8	824.6	826.9	5,479.9	5,574.8	67,653.0	72,418.0
0-15	18.5%	16.2%	16.8%	14.6%	16.6%	14.8%	18.4%	17.0%
16-64	61.1%	57.2%	62.9%	59.4%	63.8%	60.3%	62.8%	59.0%
65+	20.4%	26.6%	20.3%	25.9%	19.6%	24.9%	18.8%	24.0%

## 2.4.6 Data Gaps and Limitations

2.4.6.1 One limitation of this assessment is the reliance on population data from 2021 and projections from 2018, which are the latest available. These figures are not expected to be adjusted until the end of 2024.

2.4.6.2 Additionally, the lack of specific information on the locations of the ports has limited the details that could be included about local socio-economic study areas. However, in the absence of specific information on the ports, the assessment does consider the potential economic and social impacts in the vicinity of the ports that are selected.

## 2.5 EIA Approach and Methodology

### 2.5.1 Overview

2.5.1.1 This section outlines the methodology for assessing the likely significant effects on socio-economics, tourism and recreation chapter from the construction, operation and decommissioning of the Proposed Development. Full details of the methodology, including relevant assumptions and limitations, can be found in Volume 7F, Appendix 2-1: Socio-Economics Technical Report.

### 2.5.2 Impacts Scoped into the Assessment

2.5.2.1 The Offshore Scoping Report was submitted to MS-LOT in September 2022, while the Onshore Scoping Report was submitted to Aberdeenshire Council in December 2022. The Scoping Reports set out the overall approach to assessment and allowed for the refinement of the Proposed Development over the course of the assessment. The proposed scope of the assessment is set out in Table 2-21. Recreational trails are assessed within Volume 5, Chapter 9: Traffic and Transport.

Table 2-21: Socio-economics Scope of Assessment.

Potential Impact	Phase	Nature of Impact
Economic impacts	Construction, Operation, Decommissioning	Direct
Social impacts	Construction, Operation	In-Direct
Tourism and Recreation Impacts	Construction, Operation	In-Direct

### 2.5.3 Impacts Scoped out of the Assessment

2.5.3.1 No impacts were scoped out of the assessment at scoping.

## 2.5.4 Assessment Methodology

2.5.4.1 The project-wide generic approach to assessment is set out in Volume 1, Chapter 7: EIA Methodology. The assessment methodology for socio-economics, tourism and recreation chapter for the EIAR is consistent with that provided in the Scoping Reports.

2.5.4.2 The methodology for the assessment of socio-economics, tourism and recreation is set out in full in Section 3 of Volume 7F, Appendix 2-1: Socio-economics Technical Report). An overview is provided in the following sections.

### Economic Impact Assessment

2.5.4.3 Guidance specific to socio-economics has been considered and is outlined Section 2.2. The economic impacts are measured in terms of:

- **GVA:** this is a measure of economic output, the economic value added by an organisation, industry or region and is typically estimated by subtracting the non-staff operational costs from the turnover of an organisation.
- **Years of Employment:** this is a measure of employment which is equivalent to one person being employed for a year and is typically used when considering short-term employment impacts, such as those associated with the construction employment.
- **Employment (Jobs):** a measure of employment which considers the headcount employment in an organisation or industry.

2.5.4.4 The focus of the economic impact assessment has been on the direct and indirect (supply chain) effects, in line with the UK Offshore Wind Sector Deal<sup>50</sup>. In addition to this, the assessment also considers the effects of staff spending and the economic impact that this subsequent increase in demand stimulates (the induced effect).

2.5.4.5 Deadweight (what would have happened without the Proposed Development), leakage (economic impacts occurring outside of study areas considered) and displacement (economic activity that is being displaced by the Proposed Development) have been accounted for and are discussed in Volume 7F, Appendix 2-1: Socio-economics Technical Report.

2.5.4.6 The Proposed Development will include the construction and installation of wind turbines (installed on fixed or floating foundations), the offshore substation platforms (OSP), Onshore Substations and the construction and installation of new inter-array, interconnector and export cabling. Up to one quarters of the wind turbines may be installed on floating foundations with the remainder of infrastructure installed on fixed foundations. For the purposes of this assessment, it is assumed that this will be split across Caledonia North and Caledonia South.

2.5.4.7 The analysis for the Proposed Development covers three phases:

- Construction (including development, manufacturing and fabrication, and installation);
- Operation and maintenance; and
- Decommissioning.

- 2.5.4.8 The impacts during the construction phase have been based on the planned expenditure associated with this phase. In addition to the total impact over the period, the assessment also considers the timings of impacts during this phase to understand the peaks and troughs of this activity.
- 2.5.4.9 The impacts during the operation and maintenance phase for the Proposed Development have been based on projected operation and maintenance expenditure.
- 2.5.4.10 The impacts associated with decommissioning have been based on the analysis by BVG Associates (BVG Associates, 2021<sup>51</sup>; 2024<sup>52</sup>).
- 2.5.4.11 The operation and maintenance and decommissioning impacts have been presented as the total and net present value (NPV) impacts, in line with HM Treasury guidance (HM Treasury, 2022<sup>53</sup>). On this basis, impacts further in the future are discounted compared to impacts that are expected to occur sooner.

## Social Impact Assessment

- 2.5.4.12 The potential for the Proposed Development to have an impact on community and social assets has been scoped into this assessment for Aberdeenshire and the potential communities in the North of Scotland that will host the primary construction and potential operational ports. This section outlines the key routes to community and social impacts as a result of the development of the Proposed Development. This assessment considers the potential impacts identified in the General Advice provided by the Marine Analytical Unit (MAU, 2022<sup>54</sup>), namely:
- Population;
  - Housing demand and availability;
  - Other local services; and
  - Socio-cultural.
- 2.5.4.13 For each of the impacts listed above, this section highlights the route to impact, the factors that could affect the sensitivity of communities that may be affected and the factors that could influence the potential magnitude of any effect.
- 2.5.4.14 At the time of writing, the construction and operation ports, which are expected to be the main epicentres of impact, are not known. As a result, it is not possible to be definitive about the nature and scale of the impacts

affecting communities. This is because the location of these epicentres of impact is crucial in understanding:

- What impacts will occur and at what scale;
- The sensitivity of the communities that these impacts will occur in; and
- How these impacts will be felt across these communities.

2.5.4.15 More details on why location is particularly important in understanding how impacts are felt across communities are provided in this section, particularly in regards the factors that influence the sensitivity of the communities that will be affected.

2.5.4.16 The potential port locations are unknown at this stage and will depend on the commercial considerations and discussion with prospective ports. In 2020, the Crown Estate Scotland published its review of Scotland’s port potential for offshore wind (Crown Estate Scotland, 2020<sup>55</sup>). This found that there were a wide range of potential port locations that could be used during the construction phase of the Proposed Development, even within the North of Scotland study area. These ranged from large urban areas such as Aberdeen to ports in rural locations such as Arnish, Invergordon and Ardersier. Similarly, in 2023 RenewableUK published a study (RenewableUK, 2023<sup>56</sup>) of the current and potential port capacity for the construction of floating offshore wind projects and also identified similar ports as having potential for the floating offshore wind market in particular.

2.5.4.17 The location of operations and maintenance ports identified in the Crown Estate Scotland study also had a similar geographic spread.

2.5.4.18 The location of port infrastructure is a fundamental consideration in the assessment of social impacts. This is because the social and economic characteristics of each area will vary in ways that will change not only the scale of impacts that will occur but also how they are felt in these communities.

2.5.4.19 These characteristics include the size of the area affected, for example the area surrounding the port. Larger areas, for example cities or large towns, are expected to be less sensitive to changes because they have more diversified economies, larger housing markets and more flexible public and private sectors. This means that they can respond more easily to changes without effects on the existing baseline. In contrast smaller areas may be more sensitive to change.

2.5.4.20 When considering the potential impact of an offshore wind farm it can also be useful to think of the wider area (e.g. the Travel to Work Area). While the settlement immediately surrounding an area may be relatively small, if it has good travel links to nearby population centres the social impact is likely to be less concentrated and more diffuse.

2.5.4.21 Another factor that may affect the sensitivity of a study area is the relative size and diversity of its economy. Areas that predominantly have high

levels of unemployment or relatively few economic opportunities (e.g. because the economy is heavily reliant on one industry) may be expected to experience changes more positively.

2.5.4.22 In addition, areas that have higher levels of economic diversity or populations with skills that are more suited to the requirements of offshore wind developers are more likely to secure employment locally. As a result, there are likely to be a smaller number of transient workers who come from outside of the local area.

2.5.4.23 Similarly, areas that are experiencing shortages in the provision of goods and services may be more sensitive to a change in levels of demand.

2.5.4.24 As with the economic impacts, the process of assessing social impacts requires an understanding of what the changes will be and how these will be experienced by the communities that are affected.

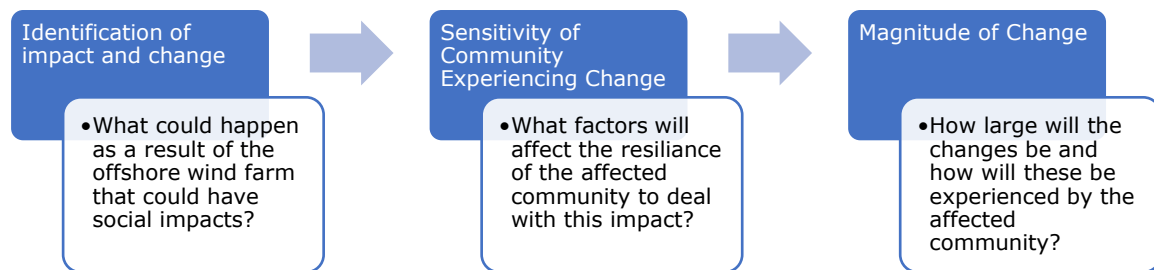


Figure 2-2: Logic chain for social impacts of offshore wind in specific communities.

## Tourism and Recreation Impact Assessment

2.5.4.25 Impacts will occur on tourism and recreation receptors if they are sensitive to changes in environmental factors that will occur as a result of the Proposed Development and the receptor is considered to experience a significant impact as a result of changes to these environmental factors.

2.5.4.26 The impacts considered on tourism and recreation assets are changes to visitor or user behaviour and outcomes. Any environmental impact (e.g. airborne noise) on these receptors shall therefore be assessed against how it will change behaviour compared to the current baseline of visitor or user behaviour of the receptor.

## Criteria for Assessment

2.5.4.27 The process for determining the significance of effects is a two-stage process that involves defining the magnitude of the potential impacts and the sensitivity of the receptors. This section describes the criteria applied in this chapter to assign values to the magnitude of potential impacts and the sensitivity of the receptors.



- 2.5.4.28 The terms used to define impact magnitude and receptor sensitivity for socio-economics, tourism and recreation are based on those described in further detail in Volume 1, Chapter 7: EIA Methodology of the EIAR.
- 2.5.4.29 The socio-economics impacts have been considered over distinct study areas to capture the spatial extent of any impact. The magnitude and significance of any impact are then considered in relation to the baseline conditions within those study areas.
- 2.5.4.30 The frequency and temporal extent of any impact has been considered and those which occur over a short period of time have been described as temporary and those which occur over a longer period of time have been described as permanent.
- 2.5.4.31 The approach to determining the magnitude of any socio-economic impacts is outlined below.

### **Magnitude of Economic Impacts**

- 2.5.4.32 Between 2000 and 2019, the average level of Gross Domestic Product (GDP) per capita growth in the UK was 1% per annum (International Monetary Fund, 2022<sup>57</sup>). Similarly, between 2000 and 2019 the number of jobs increased by 1% per annum (ONS, 2023<sup>58</sup>). The magnitude of any change in an economy should be considered within this context and in relation to the levels of economic activity within a study area.
- 2.5.4.33 In addition to the change in the overall impact in the GVA or employment of an area, consideration can also be made for the sectors of the economy which are considered to contribute to the potential for the local area to secure contracts. For example, in the context of offshore wind, the construction, manufacturing and professional services sectors present in an area are likely to contribute towards it securing contracts, since the presence of potential suppliers is likely to increase the value of contracts secured in the study area.
- 2.5.4.34 The definitions of the magnitude of economic impacts are provided in Table 2-22.

Table 2-22: Definition of Magnitude for an Economy/Economic Sector.

Magnitude Value	Description
Negligible	<p>An effect would be considered to have a negligible magnitude if it was equivalent to less than a quarter of the typical economic growth per capita. Therefore, for each study area:</p> <ul style="list-style-type: none"> <li>▪ Peak annual GVA impact is less than 0.25% of the economy or sector; or</li> <li>▪ Peak employment supported is less than 0.25% of the total number of jobs in that area or sector.</li> </ul>
Low	<p>An effect would be considered to have a low magnitude if it was equivalent to a quarter of the typical economic growth per capita. Specifically, for each study area:</p> <ul style="list-style-type: none"> <li>▪ Peak annual GVA impact is greater than, or equal to, 0.25% of the economy or sector; or</li> <li>▪ Peak employment supported is greater than, or equal to, 0.25% of the total number of jobs in the area or sector.</li> </ul>
Medium	<p>An effect would be considered to have a medium magnitude if it was equivalent to half of the typical economic growth per capita. Specifically, for each study area:</p> <ul style="list-style-type: none"> <li>▪ Peak annual GVA impact is greater than, or equal to, 0.5% of the economy or sector; or</li> <li>▪ Peak employment supported is greater than, or equal to, 0.5% of the total number of jobs in the area or sector.</li> </ul>
High	<p>An effect would be considered to have a high magnitude if it was equivalent to all of the typical economic growth per capita. Specifically, for each study area:</p> <ul style="list-style-type: none"> <li>▪ Peak annual GVA impact is greater than, or equal to, 1% of the economy or sector; or</li> <li>▪ Peak employment supported is greater than, or equal to, 1% of the total number of jobs in the area or sector.</li> </ul>

### Magnitude of Community and Social Asset Impacts

- 2.5.4.35 The magnitude of impacts on the community or social assets is dependent on the demographic changes that will occur in each of the study areas as a result of the Proposed Development.
- 2.5.4.36 The severity of any change in demographics is measured against the level of annual change that is typical in the study area that it serves. This is in line with the change a community or social asset will accommodate in a year.

Table 2-23: Definition of Magnitude for Community and Social Impacts.

Magnitude Value	Description
Negligible	The effect on community and social assets would be considered to have a negligible magnitude if the change in residual population was equivalent to less than 25% of the average annual growth rate for the study area.
Low	The effect on community and social assets would be considered to have a low magnitude if the change in residual population was equivalent to between 25% and 50% of the average annual growth rate for the study area.
Medium	The effect on community and social assets would be considered to have a medium magnitude if the change in residual population was equivalent to between 50% and 100% of the average annual growth rate for the study area.
High	The effect on community and social assets would be considered to have a high magnitude if the change in residual population was equivalent to 100% or more of the average annual growth rate for the study area.

## Magnitude of Tourism and Recreation Impacts

2.5.4.37 The definitions of the magnitude of impacts on tourism and recreation assets are provided in Table 2-24.

Table 2-24: Definition of Magnitude of Tourism and Recreation Impacts.

Magnitude Value	Description
Negligible	The effect on a tourism and recreation asset would be considered to have a negligible magnitude if is predicted to experience an undetectable change of behaviour of visitors or users.
Low	The effect on a tourism and recreation asset would be considered to have a minor magnitude if is predicted to experience a minor change of behaviour of visitors or users.
Medium	The effect on a tourism and recreation asset would be considered to have a moderate magnitude if is predicted to experience a moderate change of behaviour of visitors or users.
High	The effect on a tourism and recreation asset would be considered to have a major magnitude if it is predicted to experience a major change of behaviour of visitors or users.

## Sensitivity of Economic Receptors

2.5.4.38 The sensitivity of an economy is linked to how well it is able to absorb change. To consider the sensitivity of an economy, or a sector within that economy, it is necessary to consider both its resilience and agility. There are several factors that contribute to an assessment of resilience and agility, these include:

- The scale of the economy;
- The diversity of sectors in the economy;
- The level of economic activity;
- The level of skills and education; and
- The level of economic potential from utilising capital (natural, human, social, economic).

2.5.4.39 The sensitivity criteria for defining sensitivity in this chapter are outlined in Table 2-25.

Table 2-25: Definition of Sensitivity of Economic Receptors.

Sensitivity	Description
Negligible	<p>An economy with negligible sensitivity is very agile and will be able to accommodate changes without affecting its character or overall value. Factors that would contribute to an economy having negligible sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ The economy is well balanced between sectors;</li> <li>▪ The number of jobs in the economy has grown at a quicker rate than the wider UK economy; and</li> <li>▪ The share of people with no qualifications is below average for the wider economy.</li> </ul>
Low	<p>A low (minor) sensitive economy is tolerant changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of low sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ Most sectors of the economy are well represented;</li> <li>▪ The number of jobs in the economy has grown in line with the wider economy; and</li> <li>▪ The level of educational attainment is in line with the wider economy.</li> </ul>
Medium	<p>An economic with medium sensitivity has a moderate capacity to absorb changes without fundamentally altering its present character or value, however it would be less resilient than the wider economy. Factors that would contribute to an economy being considered of medium sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ The economy is particularly reliant on a small number of sectors;</li> <li>▪ The number of jobs in the economy has grown less than the wider economy; and</li> <li>▪ The share of people with no qualifications is above the average for the wider economy.</li> </ul>

Sensitivity	Description
High	<p>A highly (major) sensitive economy will not be able to absorb changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of high sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ The economy is particularly reliant on one single sector;</li> <li>▪ The number of jobs in the economy has been declining over multiple years; and</li> <li>▪ The share of people with no qualifications is significantly above the average for the wider economy.</li> </ul>

### Sensitivity of Community and Social Assets

- 2.5.4.40 The effect on community and social assets is scoped into this assessment. This includes the demand for housing, health services and education services.
- 2.5.4.41 The adaptability and tolerance of the housing market to accommodate change in each study area is implied by the relative change in the price of housing stock compared to the wider economy. If prices have increased significantly more within a study area, this would suggest that the housing market has not been able to adapt to a change in demand.
- 2.5.4.42 The sensitivity of the public assets such as health services or schools will be dependent on the concentration of resources that are allocated to these assets. It is assumed that the ability of these assets to adapt to change will not vary by geography. Therefore, the key factor of sensitivity is tolerance to change. It is assumed that this is linked to the relative size of the community that is served by these assets. If a teacher or doctor has less students or patients than the national average, they are more likely to be able to tolerate changes, specifically increases, in these numbers. As a result, these assets will be less sensitive to change.
- 2.5.4.43 In the long term, services will adapt to serve the communities they are in. Hospitals and education facilities are planned based on the demographic demands in a particular area. Therefore, these sensitivities are considered for short term impacts only and the long term sensitivities of these receptors will be negligible. As a result, the impacts on demographic changes and demand for services are only considered during the development and construction phase.
- 2.5.4.44 As outlined in Section 2.4.3, the working age population of Aberdeenshire and North Scotland is expected to fall, which over time is likely to create pressure on services in the long-term.

2.5.4.45 A summary of the definitions and contributing factors for the sensitivity of community and social assets are given below.

Table 2-26: Definitions of sensitivity for Community and Social Assets.

Sensitivity	Description
Negligible	<p>Community and social assets with a negligible sensitivity will be resistant to change as they will have a greater capacity to tolerate changes than the wider area. Factors that will contribute to a community or social asset being considered of negligible sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ House prices have increased at a slower rate than the national average;</li> <li>▪ The number of GPs per capita is higher than the national average; and</li> <li>▪ The number of pupils per teacher is lower than the national average.</li> </ul>
Low	<p>Community and social assets with low sensitivity will be able to tolerate or adapt to impacts without a change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of minor sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ House prices have increased at a similar rate than the national average;</li> <li>▪ The number of GPs per capita is similar to than the national average; and</li> <li>▪ The number of pupils per teacher is similar to the national average.</li> </ul>
Medium	<p>Community and social assets with medium sensitivity will have a limited capacity to tolerate or adapt to impacts as these will result in a moderate change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of moderate sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ House prices have increased at a faster rate than the national average;</li> <li>▪ The number of GPs per capita is lower than the national average; and</li> <li>▪ The number of pupils per teacher is higher than the national average.</li> </ul>
High	<p>Community and social assets with high sensitivity will not be able to tolerate or adapt to impacts as these will result in a fundamental change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of major sensitivity include:</p> <ul style="list-style-type: none"> <li>▪ House prices have increased at a notably faster rate than the national average;</li> <li>▪ The number of GPs per capita is much lower than the national average; and</li> <li>▪ The number of pupils per teacher is much higher than the national average.</li> </ul>

## Sensitivity of Tourism and Recreation Assets

- 2.5.4.46 The sensitivity of a tourism or recreation asset is determined by how reactive visitors, or users, of this asset are to a change in the environment. The sensitivity may change depending on which environmental factor is being considered. For example, an asset may be highly sensitive to changes in traffic and transport activity but have negligible sensitivity to landscape and visual impacts.
- 2.5.4.47 The sensitivity of these assets will also depend on the ability of the asset to react to any change. Assets that provide a fixed offering, such as a monument or nature-based attraction will be, other things remaining equal, more sensitive to change.

Table 2-27: Definition of Sensitivity of Tourism and Recreation Assets.

Sensitivity	Description
Negligible	<p>A tourism or recreational asset with a negligible sensitivity will be resistant to changes in environmental factors. Factors that will contribute to a tourism or recreational asset being considered of negligible sensitivity include:</p> <ul style="list-style-type: none"> <li>Environmental conditions have a negligible influence on the ability of the asset to attract or accommodate visitors and users; and</li> <li>Having substantial ability to adapt or adjust the assets in response to changes in visitor or user behaviour.</li> </ul>
Low	<p>A tourism or recreational asset with a low sensitivity will have the ability to tolerate or adapt to effects as these will result in an incidental change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of minor sensitivity include:</p> <ul style="list-style-type: none"> <li>Environmental conditions have a minor influence on the ability of the asset to attract or accommodate visitors and users; and</li> <li>Being able to adapt or adjust the assets in response to changes in visitor or user behaviour.</li> </ul>
Medium	<p>A tourism or recreational asset with a medium sensitivity will have limited capacity to tolerate or adapt to effects as these will result in a moderate change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of medium sensitivity include:</p> <ul style="list-style-type: none"> <li>Being influenced by a single environmental condition to attract or accommodate visitors and users; and</li> <li>Have a limited ability to adapt or adjust in response to changes in visitor or user behaviour.</li> </ul>
High	<p>A tourism or recreational asset with a high sensitivity will not be able to tolerate or adapt to effects as these will result in a fundamental change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of high sensitivity include:</p>

Sensitivity	Description
	<ul style="list-style-type: none"> <li>▪ Being dependent on a single environmental condition to attract or accommodate visitors and users; and</li> <li>▪ Being unable to adapt or adjust in response to changes in visitor or user behaviour.</li> </ul>

### Significance Criteria

- 2.5.4.48 The magnitude of the impact and the sensitivity of the receptor are combined when determining the significance of the effect upon socio-economics. The particular method employed for this assessment is presented in Table 2-28.
- 2.5.4.49 For the purposes of this assessment:
- A level of residual effect of moderate or more will be considered a 'significant' effect in terms of the EIA Regulations; and
  - A level of residual effect of minor or less will be considered 'not significant' in terms of the EIA Regulations.
- 2.5.4.50 Effects of moderate significance or above are therefore considered important in the decision-making process, whilst effects of minor significance or less warrant little, if any, weight in the decision-making process.

Table 2-28: EIA significance matrix used to assign significance of environmental effect.

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

### 2.5.5 Approach to Cumulative Effects

- 2.5.5.1 The Cumulative Impact Assessment (CIA) assesses the impact associated with the Proposed Development together with other relevant plans, projects and activities. Cumulative effects are therefore the combined effect of the Proposed Development in combination with the effects from a number of different projects, on the same receptor or resource.
- 2.5.5.2 The approach to the CIA for Socio-Economics, Tourism and Recreation follows the process outlined in Volume 1, Chapter 7: EIA Methodology.



## 2.5.6 Embedded Mitigation

- 2.5.6.1 Where possible, mitigation measures will be embedded into the design of the Proposed Development.
- 2.5.6.2 Certain measures have been adopted by the Proposed Development in order to reduce the potential for negative socio-economic, tourism and recreation effects and to maximise any positive effects that are identified. This includes staff dedicated to managing supply chain and community interactions to maximise benefits and ensure that disruption is minimised.
- 2.5.6.3 In addition, embedded mitigation measures have been developed into the design of the Proposed Development. These mitigation activities are expected to reduce the disruption associated with the Proposed Development, reducing potential adverse impacts for tourism and recreation users.
- 2.5.6.4 Where embedded mitigation measures have been developed into the design of the Proposed Development with specific regard to socio-economics, tourism and recreation these are described in Table 2-29. The impact assessment presented in Sections 2.7 to 2.10 take into account this embedded mitigation.

Table 2-29: Embedded Mitigation.

Code	Mitigation Measure	Securing Mechanism
M-13	Development of and adherence to a Vessel Management Plan (VMP). The VMP will confirm the types and numbers of vessels that will be engaged on the Proposed Development and consider vessel coordination including indicative transit route planning.	To be secured as a condition of the Generation Asset and Transmission Asset Marine Licences for both Caledonia North and Caledonia South
M-14	Development of and adherence to a Lighting and Marking Plan (LMP). The LMP will confirm compliance with legal requirements with regards to shipping, navigation and aviation marking and lighting.	To be secured as a condition of the Generation Asset and Transmission Asset Marine Licences for both Caledonia North and Caledonia South
M-19	Development of and adherence to a Navigational Safety Plan (NSP). The NSP will describe measures put in place by the Proposed Development related to navigational safety, including information on Safety Zones, charting, construction buoyage, temporary lighting and marking, and means of notification of Project activity to other sea users (e.g., via Notice to Mariners).	To be secured as a condition of the Generation Asset and Transmission Asset Marine Licences for both Caledonia North and Caledonia South
M-21	Advance warning and accurate location details of construction, maintenance and decommissioning operations, associated Safety Zones and advisory passing distances will be given via Notices to Mariners and Kingfisher Bulletins.	To be secured as a condition of the Generation Asset and Transmission Asset Marine Licences for both Caledonia North and Caledonia South
M-39	An Outline Construction Environmental Management Plan (CEMP) has been produced and included alongside the EIAR to support the Planning Permission in Principle (PPP) (Volume 7, Appendix 10: Outline Construction Environmental Management Plan). The Outline CEMP includes measures on pollution prevention, noise control, biosecurity, and waste management. The Outline CEMP will then be developed further through the final design process and this will result in a detailed CEMP being submitted for discharge. The CEMP will be implemented to avoid, minimise or mitigate effects on	Detailed CEMP secured through a condition attached to the PPP.

Code	Mitigation Measure	Securing Mechanism
the environment during the construction and decommissioning phases of the Proposed Development (Onshore).		
M-64	<p>Production of the Outline Construction Traffic Management Plan (CTMP), as presented in Volume 7E, Appendix 9-2: Outline CTMP. The Outline CTMP will then be developed further with submission of a detailed planning application and supporting CTMP at a later date.</p> <p>The Outline CTMP sets out a basic framework and series of vehicle management actions or principles that will help facilitate the safe operation of construction vehicles to, from and within the limits of the construction boundary. This Outline CTMP is based upon the information available at the time of writing, including but not limited to, an estimation on the location and number of construction compounds (derived from a provisional construction programme).</p> <p>The contents of the Outline CTMP are based upon a 'worst case' scenario whereby the greatest volume of construction traffic has been identified and then routed through the surrounding local road network.</p>	The CTMP will be secured through a condition attached to the PPP

## 2.6 Key Parameters for Assessment

2.6.1.1 Volume 1, Chapter 4: Proposed Development (Onshore) Description, and Volume 1, Chapter 3: Proposed Development (Offshore) Description, detail the parameters of the Proposed Development using the Rochdale Envelope approach. This section identifies those parameters during construction, operation and decommissioning relevant to potential impacts on socio-economics, tourism and recreation.

2.6.1.2 The worst case assumptions with regard to socio-economics, tourism and recreation are summarised in Table 2-30.

### 2.6.2 Supply Chain Development Statement

2.6.2.1 As part of the SCDS<sup>59</sup>, the Applicant has committed to support the development of the Scottish supply chain and maximise the potential economic benefits to Scotland, though this is contingent on the activities of a range of stakeholders and developers. The Applicant has committed to a number of activities to support the supply chain, and invest in capacity and skills.

2.6.2.2 More information is presented in the Economic Impact Assessment below.

### 2.6.3 Proposed Development Phasing

2.6.3.1 As described in Volume 1, Chapter 5: Proposed Development Phasing, the Proposed Development is subject to phasing with the worst case parameters considered within each individual assessment.

2.6.3.2 The worst case assumptions with regard to the consideration of construction scenarios are also summarised in Table 2-30.

Table 2-30: Worst Case Assessment Scenario Considered for Each Impact as Part of the Assessment of Likely Significant Effects.

Potential Impact	Assessment Parameter	Explanation
Economic impacts	The Proposed Development (Offshore) is expected to consist of 140 Wind Turbine Generators (WTGs). Up to 39 of the 140 WTGs will be installed on floating foundations with the remaining WTG installed on fixed foundations.	<p>The combined scenario reflects the highest projected expenditure and therefore potential significance. For ease of analysis this expenditure has been split between Caledonia North and Caledonia South.</p> <p>This is expected to lead to changes in employment and economic activity in each socio-economic study area.</p> <p>It is acknowledged that at the time of writing, the exact levels of expenditure are estimated. The SCDS will be updated to reflect changes to the supply chain and the Proposed Development’s final design.</p>
Tourism and recreation impacts	<p>Tourism sector impacts are determined by potentially significant effects on the key drivers of the tourism economy, and individual tourism and recreation assets, in the Aberdeenshire and Caithness TRSA. Tourism and recreation impacts are determined by environmental effects identified in other chapters including:</p> <ul style="list-style-type: none"> <li>▪ Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation;</li> <li>▪ Volume 5, Chapter 5: Terrestrial Archaeology and Cultural Heritage;</li> <li>▪ Volume 5, Chapter 2: Land Use;</li> </ul>	Impacts may lead to changes in visitor behaviour, though this is likely to be mitigated by designed-in measures.

Potential Impact	Assessment Parameter	Explanation
	<ul style="list-style-type: none"> <li>▪ Volume 5, Chapter 8: Airborne Noise and Vibration;</li> <li>▪ Volume 5, Chapter 9: Traffic and Transport;</li> <li>▪ Volume 5, Chapter 4: Landscape and Visual Assessment; and</li> <li>▪ Volumes 2, 3 and 4, Chapter 12: Seascape, landscape and Visual Impact Assessment.</li> </ul> <p>The worst case assessment for this assessment is therefore determined by the worst case assumptions relative to each of these chapters</p>	
Social impacts	N/A	<p>The potential impact on residential amenities and community facilities is determined by the ability of these assets to adapt to population increases.</p> <p>A higher number of transient workers results in a large population increase which may increase the magnitude of any requirements on residential amenities and community facilities. As the potential employment, and therefore the number of transient workers, generated by the Proposed Development is not different between scenarios, this does not affect the scenario analysed.</p>

Potential Impact	Assessment Parameter	Explanation
<b>With five year gap</b>		
Economic impacts	<p>The Proposed Development is expected to consist of up to 140 WTGs.</p> <p>Conservative assumptions are made with regards to the ability of businesses in each study area to deliver the contracts for the Proposed Development across all tiers. These assumptions are in line with shares described in the commitment scenario of the Supply Chain Development Strategy (SCDS), updated in April 2023 (Caledonia Offshore Wind Farm Limited (Caledonia OWF), 2023<sup>59</sup>).</p> <p>Assumed that the combination development is phased with a five year gap.</p>	<p>This is expected to lead to changes in employment and economic activity in each socio-economic study area.</p> <p>The commitment scenario is expected to lead to smaller beneficial changes in employment and economic activity in each study area than the ambition scenario.</p> <p>The five year gap in phasing will result in lower peak employment</p>
Tourism and recreation impacts	<p>Tourism sector impacts are determined by potentially significant effects on the key drivers of the tourism economy, and individual tourism and recreation assets, in the Aberdeenshire TRSA and Caithness TRSA. Tourism and recreation impacts are determined by environmental effects identified in other chapters including:</p> <ul style="list-style-type: none"> <li>▪ Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation;</li> <li>▪ Volume 5, Chapter 5: Terrestrial Archaeology and Cultural Heritage;</li> <li>▪ Volume 5, Chapter 2: Land Use;</li> <li>▪ Volume 5, Chapter 8: Airborne Noise and Vibration;</li> <li>▪ Volume 5, Chapter 9: Traffic and Transport;</li> </ul>	<p>Impacts may lead to changes in visitor behaviour, though this is likely to be mitigated by designed in measures.</p>

Potential Impact	Assessment Parameter	Explanation
	<ul style="list-style-type: none"> <li>▪ Volume 5, Chapter 4: Landscape and Visual Assessment; and</li> <li>▪ Volumes 2, 3 and 4, Chapter 12: Seascape, landscape and Visual Impact Assessment.</li> </ul> <p>The worst case assessment for this assessment is therefore determined by the worst case assumptions relative to each of these chapters</p>	
Social impacts	N/A	<p>The potential impact on residential amenities and community facilities is determined by the ability of these assets to adapt to population increases.</p> <p>A higher number of transient workers results in a large population increase which may increase the magnitude of any requirements on residential amenities and community facilities. As the potential employment, and therefore the number of transient workers, generated by the Proposed Development is not different between scenarios, this does not affect the scenario analysed.</p>



## 2.7 Potential Effects

### 2.7.1 Construction

#### Economic Impact

2.7.1.1 The economic impact during the construction phase is generated by the increase spend in the economy required to develop and build the Proposed Development. This generates increased GVA and employment.

#### Magnitude of Impact

2.7.1.2 The first step in estimating the economic impact associated with the Proposed Development was identifying the total level of expenditure associated with it, and then identifying the elements associated with the Proposed Development specifically.

2.7.1.3 As part of the ScotWind leasing process, the Applicant provided estimates of the minimum share of spending that they expect to take place in Scotland and rest of UK, which is shown in Table 2-31 (Ocean Winds, 2023<sup>60</sup>).

Table 2-31: Supply Chain Development Statement – Construction (Commitment) Proposed Development.

Parameters	Scotland	Rest of UK
Development	£300 m	£65 m
Manufacturing and Fabrication	£677 m	£1,348 m
Installation	£429 m	£292 m
Total Construction	£1,406 m	£1,705 m

Note: totals may not sum due to rounding.

2.7.1.4 The expenditure associated with the Proposed Development presented in the SCDS is expected to be split equally between Caledonia North and Caledonia South and the phases of the Proposed Development, including the OnTI, and the assessment of the potential effects on socio-economics, tourism and recreation follows this assumption.

2.7.1.5 This spending is then analysed based on BiGGAR Economics analysis and work undertaken by BVG Associates on the costs associated with offshore wind farms (BVG Associates, 2019<sup>26</sup>). The share of spend secured in each study area was assumed based on information provided by the Applicant

and BiGGAR Economics analysis of the SCDS (for more details see Section 3 of Volume 7F, Appendix 2-1: Socio-economics Technical Report).

- 2.7.1.6 As can be seen in Table 2-32, it is anticipated that total capital investment required for the Proposed Development (Offshore) will be £1,285 million in Scotland and £2,969 million in the UK.

Table 2-32: Proposed Development (Offshore) Spending, Scotland and the UK (SCDS).

Parameters	Scotland	UK
Total Construction	£1,285 m	£2,969 m

- 2.7.1.7 As can be seen in Table 2-33, it is anticipated that total capital investment required for the Proposed Development (Onshore) will be £121 million in Scotland and £142 million in the UK.

Table 2-33 Proposed Development (Onshore) Spending, Scotland and the UK (SCDS).

Parameters	Scotland	UK
Total Construction	£121 m	£142 m

- 2.7.1.8 To estimate the economic impact associated with expenditure in each category and sub-category, each contract was assigned to one or more sectors of the economy. Data on turnover, employment and GVA was then used to assess turnover/GVA and turnover per employee ratios (ONS, 2022<sup>61</sup>). This was then applied to the expenditure to estimate the direct economic impact in Scotland and the UK.
- 2.7.1.9 On this basis, as can be seen in Table 2-34, Table 2-35, and Table 2-36, it was estimated that the direct economic impact of the Proposed Development (Offshore) (Caledonia North, Caledonia South) would be £82 million GVA and 1,172 years of employment in North Scotland, £275 million GVA and 4,210 years of employment in Scotland, and £588 million GVA and 8,680 years of employment in the UK.
- 2.7.1.10 As shown in Table 2-34, Table 2-35, and Table 2-36, it was estimated that the direct economic impact of the Proposed Development (Offshore) (Caledonia North and Caledonia South combined) would be £164 million GVA and 2,345 years of employment in North Scotland, £550 million GVA and 8,410 years of employment in Scotland, and £1,176 million GVA and 17,360 years of employment in the UK.

Table 2-34: Proposed Development (Offshore) Construction Direct Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£82 m	1,172	£82 m	1,172	£164 m	2,345

Table 2-35: Proposed Development (Offshore) Construction Direct Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£275 m	4,210	£275 m	4,210	£550 m	8,410

Table 2-36: Proposed Development (Offshore) Construction Direct Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£588 m	8,680	£588 m	8,680	£1,176 m	17,360

2.7.1.11 For the Proposed Development (Onshore), as shown in Table 2-37, Table 2-38, and Table 2-39, it was estimated that the direct economic impact of the Proposed Development (Onshore, Phase 1 and Phase 2) would be £6 million GVA and 90 years of employment in Aberdeenshire, £27 million GVA and 394 years of employment in Scotland, and £32 million GVA and 470 years of employment in the UK.

2.7.1.12 As shown in Table 2-37, Table 2-38, and Table 2-39, it was estimated that the direct economic impact of the Proposed Development (Onshore) would be £12 million GVA and 180 years of employment in Aberdeenshire, £55 million GVA and 788 years of employment in Scotland, and £65 million GVA and 941 years of employment in the UK.

Table 2-37: Proposed Development (Onshore) Construction Direct Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£6 m	90	£6 m	90	£12 m	180

Table 2-38: Proposed Development (Onshore) Construction Direct Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£27 m	394	£27 m	394	£55 m	788

Table 2-39: Proposed Development (Onshore) Construction Direct Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	£32 m	470	£32 m	470	£65 m	941

2.7.1.13 For the Proposed Development (Caledonia North and OnTI, Caledonia South and OnTI), as shown in Table 2-40, Table 2-41, and Table 2-42, it was estimated that the direct economic impact would be £92 million GVA and 1,312 years of employment in North Scotland, £303 million GVA and 4,604 years of employment in Scotland, and £620 million GVA and 9,150 years of employment in the UK.

2.7.1.14 It was estimated that the direct economic impact of the Proposed Development, as shown in Table 2-40, Table 2-41, and Table 2-42, would be £185 million GVA and 2,624 years of employment in North Scotland, £605 million GVA and 9,198 years of employment in Scotland, and £1,241 million GVA and 18,301 years of employment in the UK.

Table 2-40: Proposed Development Construction Direct Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Total	£92 m	1,312	£92 m	1,312	£185 m	2,624

Table 2-41: Proposed Development Construction Direct Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Total	£303 m	4,604	£303 m	4,604	£605 m	9,198

Table 2-42 Proposed Development Construction Direct Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Total	£620 m	9,150	£620 m	9,150	£1,241 m	18,301

2.7.1.15 In addition to the direct economic impact associated with the expenditure, wider economic impacts will be supported by spending in the supply chain (indirect effects) and staff spending (induced effects). These were estimated using GVA and employment multipliers (ONS, 2023<sup>62</sup>; Scottish Government (2022<sup>63</sup>) that capture linkages between sectors of the economy.

2.7.1.16 Applying these multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-43, Table 2-44, and Table 2-45, it was estimated that the total economic impact of the Proposed Development (Offshore) (North and South) would be £106 million GVA and 1,469 years of employment in North Scotland (peaking at 471 jobs), £465 million GVA and 6,830 years of employment in Scotland (peaking at 1,860 jobs), and £1,550 million GVA and 22,620 years of employment in the UK (peaking at 5,740 jobs).

2.7.1.17 It was estimated that the total economic impact of the Proposed Development (Offshore) as shown in Table 2-43, Table 2-44, and Table 2-45, would be £212 million GVA and 2,938 years of employment in North Scotland (peaking at 942 jobs), £931 million GVA and 13,650 years of employment in Scotland (peaking at 3,720 jobs), and £3,101 million GVA and 45,240 years of employment in the UK (peaking at 11,480 jobs).

Table 2-43: Proposed Development (Offshore) Construction Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£82 m	1,172	£82 m	1,172	£164 m	2,344
Indirect	£12 m	166	£12 m	166	£24 m	332
<b>Total</b>	<b>£94 m</b>	<b>1,339</b>	<b>£94 m</b>	<b>1,339</b>	<b>£188 m</b>	<b>2,678</b>
<i>Peak</i>	<i>£34 m</i>	<i>471</i>	<i>£34 m</i>	<i>471</i>	<i>£68 m</i>	<i>942</i>
Induced	£12 m	130	£12 m	130	£24 m	260
<b>Total (with Induced)</b>	<b>£106 m</b>	<b>1,469</b>	<b>£106 m</b>	<b>1,469</b>	<b>£212 m</b>	<b>2,938</b>

Note: totals may not sum due to rounding.

Table 2-44: Proposed Development (Offshore) Construction Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£275 m	4,210	£275 m	4,210	£550 m	8,410
Indirect	£108 m	1,620	£108 m	1,620	£216 m	3,230
<b>Total</b>	<b>£383 m</b>	<b>5,820</b>	<b>£383 m</b>	<b>5,820</b>	<b>£767 m</b>	<b>11,650</b>
<i>Peak</i>	<i>£122 m</i>	<i>1,860</i>	<i>£122 m</i>	<i>1,860</i>	<i>£243 m</i>	<i>3,720</i>
Induced	£82 m	1,000	£82 m	1,000	£164 m	2,010
<b>Total (with Induced)</b>	<b>£465 m</b>	<b>6,830</b>	<b>£465 m</b>	<b>6,830</b>	<b>£931 m</b>	<b>13,650</b>

Note: totals may not sum due to rounding.

Table 2-45: Proposed Development (Offshore) Construction Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£588 m	8,680	£588 m	8,680	£1,176 m	17,360
Indirect	£502 m	7,240	£502 m	7,240	£1,005 m	14,480
<b>Total</b>	<b>£1,090 m</b>	<b>15,920</b>	<b>£1,090 m</b>	<b>15,920</b>	<b>£2,181 m</b>	<b>31,840</b>
<i>Peak</i>	<i>£389 m</i>	<i>5,740</i>	<i>£389 m</i>	<i>5,740</i>	<i>£779 m</i>	<i>11,480</i>
Induced	£460 m	6,700	£460 m	6,700	£920 m	13,400
<b>Total (with Induced)</b>	<b>£1,550 m</b>	<b>22,620</b>	<b>£1,550 m</b>	<b>22,620</b>	<b>£3,101 m</b>	<b>45,240</b>

Note: totals may not sum due to rounding.

- 2.7.1.18 Applying these multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-46, Table 2-47, and Table 2-48, it was estimated that the total economic impact of the Proposed Development (Onshore, Phase 1 and Phase 2) would be £8 million GVA and 110 years of employment in Aberdeenshire (peaking at 20 jobs), £45 million GVA and 607 years of employment in Scotland (peaking at 90 jobs), and £92 million GVA and 1,275 years of employment in the UK (peaking at 154 jobs).
- 2.7.1.19 As shown in Table 2-46, Table 2-47, and Table 2-48, it was estimated that the total economic impact of the Proposed Development (Onshore) would be £16 million GVA and 220 years of employment in Aberdeenshire (peaking at 40 jobs), £90 million GVA and 1,214 years of employment in Scotland (peaking at 181 jobs), and £183 million GVA and 2,550 years of employment in the UK (peaking at 309 jobs).

Table 2-46: Proposed Development (Onshore) Construction Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£6 m	90	£6 m	90	£12 m	180
Indirect	£1 m	10	£1 m	10	£2 m	20
<b>Total</b>	<b>£7 m</b>	<b>100</b>	<b>£7 m</b>	<b>100</b>	<b>£14 m</b>	<b>200</b>
Peak	£1 m	20	£1 m	20	£2 m	40
Induced	£1 m	10	£1 m	10	£2 m	20
<b>Total (with Induced)</b>	<b>£8 m</b>	<b>110</b>	<b>£8 m</b>	<b>110</b>	<b>£16 m</b>	<b>220</b>

Note: totals may not sum due to rounding.

Table 2-47 Proposed Development (Onshore) Construction Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£27 m	394	£27 m	394	£55 m	788
Indirect	£10 m	131	£10 m	131	£20 m	262
<b>Total</b>	<b>£37 m</b>	<b>525</b>	<b>£37 m</b>	<b>525</b>	<b>£75 m</b>	<b>1,051</b>
Peak	£8 m	90	£8 m	90	£15 m	181
Induced	£8 m	82	£8 m	82	£16 m	163
<b>Total (with Induced)</b>	<b>£45 m</b>	<b>607</b>	<b>£45 m</b>	<b>607</b>	<b>£90 m</b>	<b>1,214</b>

Note: totals may not sum due to rounding.



Table 2-48: Proposed Development (Onshore) Construction Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£32 m	470	£32 m	470	£65 m	941
Indirect	£31 m	402	£31 m	402	£61 m	804
<b>Total</b>	<b>£63 m</b>	<b>873</b>	<b>£63 m</b>	<b>873</b>	<b>£126 m</b>	<b>1,745</b>
Peak	£12 m	154	£12 m	154	£24 m	309
Induced	£29 m	402	£29 m	402	£57 m	805
<b>Total (with Induced)</b>	<b>£92 m</b>	<b>1,275</b>	<b>£92 m</b>	<b>1,275</b>	<b>£183 m</b>	<b>2,550</b>

Note: totals may not sum due to rounding.

2.7.1.20 For the Proposed Development, as shown in Table 2-49, Table 2-50, and Table 2-51, it was estimated that the total economic impact of the Proposed Development (North, South and the Proposed Development (Onshore)) would be £119 million GVA and 1,642 years of employment in Aberdeenshire (peaking at 518 jobs), £510 million GVA and 7,437 years of employment in Scotland (peaking at 1,898 jobs), and £1,642 million GVA and 23,895 years of employment in the UK (peaking at 5,796 jobs).

2.7.1.21 As shown in Table 2-49, Table 2-50, and Table 2-51, it was estimated that the total economic impact of the Proposed Development would be £238 million GVA and 3,283 years of employment in North Scotland (peaking at 1,035 jobs), £1,021 million GVA and 14,864 years of employment in Scotland (peaking at 3,795 jobs), and £3,284 million GVA and 47,790 years of employment in the UK (peaking at 11,591 jobs).

Table 2-49 Proposed Development Construction Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£92 m	1,312	£92 m	1,312	£184 m	2,624
Indirect	£14 m	185	£14 m	185	£28 m	370
<b>Total</b>	<b>£106 m</b>	<b>1,497</b>	<b>£106 m</b>	<b>1,497</b>	<b>£212 m</b>	<b>2,994</b>
<i>Peak</i>	<i>£38 m</i>	<i>518</i>	<i>£38 m</i>	<i>518</i>	<i>£77 m</i>	<i>1,035</i>
Induced	£13 m	145	£13 m	145	£26 m	290
<b>Total (with Induced)</b>	<b>£119 m</b>	<b>1,642</b>	<b>£119 m</b>	<b>1,642</b>	<b>£238 m</b>	<b>3,283</b>

Note: totals may not sum due to rounding.

Table 2-50: Proposed Development Construction Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£303 m	4,604	£303 m	4,604	£605 m	9,198
Indirect	£118 m	1,751	£118 m	1,751	£236 m	3,492
<b>Total</b>	<b>£421 m</b>	<b>6,345</b>	<b>£421 m</b>	<b>6,345</b>	<b>£841 m</b>	<b>12,701</b>
<i>Peak</i>	<i>£128 m</i>	<i>1,898</i>	<i>£128 m</i>	<i>1,898</i>	<i>£257 m</i>	<i>3,795</i>
Induced	£90 m	1,082	£90 m	1,082	£179 m	2,173
<b>Total (with Induced)</b>	<b>£510 m</b>	<b>7,437</b>	<b>£510 m</b>	<b>7,437</b>	<b>£1,021 m</b>	<b>14,864</b>

Note: totals may not sum due to rounding.

Table 2-51: Proposed Development Construction Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£620 m	9,150	£620 m	9,150	£1,241 m	18,301
Indirect	£533 m	7,642	£533 m	7,642	£1,066 m	15,284
<b>Total</b>	<b>£1,153 m</b>	<b>16,793</b>	<b>£1,153 m</b>	<b>16,793</b>	<b>£2,307 m</b>	<b>33,585</b>
Peak	£394 m	5,796	£394 m	5,796	£788 m	11,591
Induced	£489 m	7,102	£489 m	7,102	£978 m	14,205
<b>Total (with Induced)</b>	<b>£1,642 m</b>	<b>23,895</b>	<b>£1,642 m</b>	<b>23,895</b>	<b>£3,284 m</b>	<b>47,790</b>

Note: totals may not sum due to rounding.

2.7.1.22 The magnitude of impacts during the construction phase for the Proposed Development (Offshore) for each study area are presented in Table 2-52, Table 2-53 and Table 2-54. The magnitude is considered relative to the level of employment in the construction sector in each study area because this is a key sector in each area and where the majority of the contracts will be awarded.

Table 2-52: Magnitude – Proposed Development (Offshore) Impact, North Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Peak Employment	471	471	942
% of Construction Sector Employment in Study Area	1.9%	1.9%	3.8%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-53: Magnitude – Proposed Development (Offshore) Impact, Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Peak Employment	1,860	1,860	3,720
% of Construction Sector Employment in Study Area	1.2%	1.2%	2.4%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-54: Magnitude – Proposed Development (Offshore) Impact, UK.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Peak Employment	5,740	5,740	11,480
% of Construction Sector Employment in Study Area	0.4%	0.4%	0.7%
<b>Magnitude of Impact</b>	<b>Low</b>	<b>Low</b>	<b>Medium</b>

Note: totals may not sum due to rounding.

2.7.1.23 The magnitude of impacts during the construction phase for the Proposed Development (Onshore) for each study area are presented in Table 2-55, Table 2-56 and Table 2-57. The magnitude is considered relative to the level of employment in the construction sector in each study area, because this is a key sector in each area and where the majority of the contracts will be awarded.

Table 2-55: Magnitude – Proposed Development (Onshore) Impact, Aberdeenshire.

	Phase 1	Phase 2	Proposed Development (Onshore)
Peak Employment	20	20	40
% of Construction Sector Employment in Study Area	0.2%	0.2%	0.5%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-56: Magnitude - Proposed Development (Onshore) Impact, Scotland.

	Phase 1	Phase 2	Proposed Development (Onshore)
Peak Employment	90	90	181
% of Construction Sector Employment in Study Area	0.1%	0.1%	0.1%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-57: Magnitude – Proposed Development (Onshore) Impact, UK.

	Phase 1	Phase 2	Proposed Development (Onshore)
Peak Employment	154	154	309
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

2.7.1.24 The magnitude of impacts during the construction phase for the Proposed Development for each study area are presented in Table 2-58, Table 2-59 and Table 2-60. The magnitude is considered relative to the level of employment in the construction sector in each study area, because this is a key sector in each area and where the majority of the contracts will be awarded.

Table 2-58: Magnitude – Proposed Development Impact, North Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Peak Employment	518	518	1,035
% of Construction Sector Employment in Study Area	2.1%	2.1%	4.2%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-59: Magnitude - Proposed Development Impact, Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Peak Employment	1,898	1,898	3,795
% of Construction Sector Employment in Study Area	1.2%	1.2%	2.4%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-60: Magnitude Proposed Development Impact, UK.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Peak Employment	5,796	5,796	11,591
% of Construction Sector Employment in Study Area	0.4%	0.4%	0.7%
<b>Magnitude of Impact</b>	<b>Low</b>	<b>Low</b>	<b>Medium</b>

Note: totals may not sum due to rounding.

### Sensitivity of Receptor

- 2.7.1.25 The sensitivity of an economy is based on its responsiveness to change, its relative diversity (more diverse economies are less sensitive) and growth trajectory (for example is the number of jobs increasing or decreasing).
- 2.7.1.26 The Aberdeenshire economy employs 112,850 people, and therefore has been assessed as medium sensitivity.
- 2.7.1.27 Given the size of the North Scotland economy, employs 439,600 people, it has been assessed as low sensitivity.
- 2.7.1.28 Given the size and diversity of the Scottish economy, which employs 2.6 million people, it has been assessed as low sensitivity.
- 2.7.1.29 Similarly, the UK economy, which employs 32.2 million people, has been assessed as being of negligible sensitivity.

### Significance of Effect

- 2.7.1.30 The significance of the construction impacts during for the Proposed Development (Offshore) are shown in Table 2-61, Table 2-62 and Table 2-63.

Table 2-61: Significance of Construction Economic Impacts – Proposed Development (Offshore), North Scotland.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-62: Significance of Construction Economic Impacts – Proposed Development (Offshore), Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-63: Significance of Construction Economic Impacts – Proposed Development (Offshore), UK.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Magnitude of Impact	Low	Low	Medium
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.1.31 The significance of the construction impacts during for the Proposed Development (Onshore) are shown in Table 2-64, Table 2-65 and Table 2-66.

Table 2-64: Significance of Construction Economic Impacts – Proposed Development (Onshore) Aberdeenshire.

	Phase 1	Phase 2	Proposed Development (Onshore)
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Medium	Medium	Medium
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-65: Significance of Construction Economic Impacts – Proposed Development (Onshore), Scotland.

	Phase 1	Phase 2	Proposed Development (Onshore)
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-66 Significance of Construction Economic Impacts – Proposed Development (Onshore), UK.

	Phase 1	Phase 2	Proposed Development (Onshore)
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.1.32 The significance of the construction impacts during for the Proposed Development are shown in Table 2-67, Table 2-68 and Table 2-69.

Table 2-67: Significance of Construction Economic Impacts – Proposed Development, North Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-68: Significance of Construction Economic Impacts – Proposed Development, Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>



Table 2-69: Significance of Construction Economic Impacts – Proposed Development, UK.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Low	Low	Medium
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

### Secondary Economic Impacts from Other Environmental Effects

2.7.1.33 There is no secondary economic impact from other environmental factors during the construction phase. See Section 2.9 for more details.

### Tourism and Recreation Impacts

2.7.1.34 The assessment considers whether the construction of the Proposed Development would affect any of the tourism attractions identified in Section 2.4.4 accounting for any significant effects identified in other chapters.

2.7.1.35 The following chapters have been reviewed to assess effects arising from onshore infrastructure:

- Volume 5, Chapter 5: Terrestrial Archaeology and Cultural Heritage;
- Volume 5, Chapter 2: Land Use;
- Volume 5, Chapter 8: Airborne Noise and Vibration;
- Volume 5, Chapter 9: Traffic and Transport; and
- Volume 5, Chapter 4: Landscape and Visual Assessment.

2.7.1.36 The following chapters have been reviewed to assess effects arising from offshore infrastructure:

- Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation; and
- Volumes 2, 3 and 4, Chapter 12: Seascape, Landscape and Visual Impact Assessment.

### Onshore

2.7.1.37 As shown in Table 2-70, where no significant effects have been identified, this is indicated with an X. Where a potential significant effect has been identified, this is indicated with a ✓.

Table 2-70: Significant Effects Identified on Tourism and Recreation Assets.

Attraction	Airborne Noise	Shipping and Navigation	Infrastructure and Other Users	LVIA	Archaeology and Cultural Heritage	Traffic and Transport
North East Shooting Breaks	X	X	X	✓	X	X
The Boyndie Visitor Centre	X	X	X	X	X	X
Inchdrewer Castle	X	X	X	X	X	X
Eden Castle	X	X	X	X	X	X
Boyne Castle	X	X	X	X	X	X
Delgatie Castle	X	X	X	X	X	X
Banff Harbour Marina	X	X	X	X	X	X
Banff Castle	X	X	X	X	X	X
Duff House	X	X	X	X	X	X
Duff House Royal Golf Club	X	X	X	X	X	X
Museum of Banff	X	X	X	X	X	X
St Mary's Parish Church	X	X	X	X	X	X
Turriff Golf Club	X	X	X	X	X	X
Macduff Marine Aquarium	X	X	X	X	X	X
New Deer Showground	X	X	X	X	X	X
Suds Surf School	X	X	X	X	X	X
Sandend Beach	X	X	X	X	X	X
Haddo House	X	X	X	X	X	X
Fyvie Castle	X	X	X	X	X	X
Bennachie Forest	X	X	X	X	X	X
Castle Fraser	X	X	X	X	X	X
Crathes Castle	X	X	X	X	X	X

2.7.1.38 Potential significant effects have been identified in Volume 5, Chapter 4: Landscape and Visual Impact Assessment, which affect the tourism

attractions identified in Section 2.4.4. The significant effect identified is the landscape character within 3km of the Onshore Substation Site. The only tourism attraction within this area is the North East Shooting Breaks.

*Magnitude of Impact*

2.7.1.39 The magnitude of the effect on the tourism assets has been assessed after consideration of other environmental factors identified elsewhere in the EIAR that will have a significant impact on the tourism economy or tourism assets.

2.7.1.40 The only tourism asset which has been identified being significantly affected with reference to the other chapters is North East Shooting Breaks. The significant effect identified is the landscape character within 3km of the Onshore Substation Site. The landscape setting is not the fundamental driver of the decision to participate in the activities at North East Shooting Breaks. Therefore, the magnitude of the impact has been assessed as low.

Table 2-71: Magnitude of Tourism Attraction Impacts – Onshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North East Shooting Breaks	Low	Low	Low

*Sensitivity of Receptor*

2.7.1.41 The sensitivities of the tourism assets have been outlined below.

Table 2-72: Tourism Asset Sensitivities – Onshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North East Shooting Breaks	Negligible	Negligible	Negligible

*Significance of Effect*

2.7.1.42 Based on the assessment of the sensitivity and magnitude, the significance effect on the tourism assets of the Proposed Development has been outlined in Table 2-73.

Table 2-73: Significance of Tourism Attraction Impacts – Onshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North East Shooting Breaks	Negligible (Not Significant)	Negligible (Not Significant)	Negligible (Not Significant)

## Offshore

- 2.7.1.43 As discussed in Volume 2, Chapter 12: Seascape, Landscape and Visual Impact Assessment there are expected to be significant visual impacts in Caithness and Aberdeenshire.
- 2.7.1.44 In Caithness, moderate significant visual impacts were identified at the Viewpoint 4: Keiss, Viewpoint 5: Wick (path south of South View), Viewpoint 6: Sarclet and Viewpoint 8: Whaligoe Steps. This is due to the appearance of WTGs and OSPs, as well as the large numbers of cranes and vessels.
- 2.7.1.45 On this basis, it was concluded that a 27km section of coast between Whaligoe and Keiss is expected to experience moderate significant visual impact effect, with a further 17km section between Wick and Hill of Harley experiencing significant cumulative effects. These effects were associated with Caledonia North.
- 2.7.1.46 In Aberdeenshire, moderate (borderline) significant visual impacts were identified at Viewpoint 17: Portsoy, Viewpoint 18: MacDuff and Viewpoint 19: Gardenstown. This is due to the appearance of WTGs and OSPs, as well as the large numbers of cranes and vessels.
- 2.7.1.47 On this basis, a 17km section of coast between Portsoy and Gardenstown is expected to experience moderate (borderline) significant visual impact effects. These effects were associated with Caledonia South.

### *Magnitude of Impact*

- 2.7.1.48 As identified in the baseline assessment (Section 2.4), none of the main regional attractions in Caithness are located within the section of coast between Keiss and Whaligoe Steps. Visitors within the Caithness TRSA who are on the North Coast 500 coastal route are in the area due to the various attractions along the route, and therefore their behaviour is not expected to change. Therefore, the impact has been assessed as negligible.
- 2.7.1.49 For some of the local attractions (Wick Heritage Museum and Pulteney Distillery) views of the sea are not considered to be key features, and therefore they would not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible.
- 2.7.1.50 For Keiss Castle and Castle Sinclair, both of which are ruined castles located on the coastline, the predominant features are their historical significance and their dramatic position on the coast. While the visual impact may have some affect, it is not expected to substantially alter visitor behaviour. Therefore, the effect has been assessed as low.
- 2.7.1.51 At Whaligoe Steps the key features are the history of the attraction, which was previously used by fishers bringing the catch ashore, and the dramatic nature of the steps cut into the cliff. Views towards the sea are appreciated

when visitors are in the harbour itself, as well as the view of the stacks and cliffs.

- 2.7.1.52 Though there is potential for the visual impact to affect visitor behaviour, given the appearance of existing WTGs from Beatrice OWF and Moray East OWF and the key features of the attraction, it is not expected that the additional turbines will substantially reduce the number of visitors. As a result, the impact has been assessed as low.
- 2.7.1.53 For Banff Harbour Marina, the key feature for visitors is the ability to go out to sea in one of the pleasure craft. This is not expected to be affected by the visual impact and therefore the effect has been assessed as negligible.
- 2.7.1.54 The main attraction of Banff Castle is its historical significance, which will not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible. Similarly, the key feature of MacDuff Marine Aquarium is the visible sea life, which is not expected to be affected by the Proposed Development. Therefore, the effect has been assessed as negligible.
- 2.7.1.55 The magnitude of impact associated with each attraction is presented in Table 2-74 below.

Table 2-74: Magnitude of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Negligible	Low
Castle Sinclair	Low	Negligible	Low
Whaligoe Steps	Low	Negligible	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Sensitivity of Receptor*

- 2.7.1.56 In Caithness, the North Coast 500 is considered to be resistant to changes associated with visual impact because there are a variety of attractions

along the route that attract people. Therefore, the sensitivity has been assessed as negligible. Similarly, Wick Heritage Museum, Pulteney Distillery, Banff Harbour Marina, Banff Castle and MacDuff Marine Aquarium are considered to have negligible sensitivity, because views towards the sea are not considered to be a key part of their attraction.

2.7.1.57 Given their position on the coast and settings, Keiss Castle, Castle Sinclair and Whaligoe Steps may be affected by visual impacts, though there are a range of other factors (e.g., history) that are important in their attractiveness to visitors. Therefore, they are considered to have low sensitivity.

2.7.1.58 The sensitivity of each attraction is presented in Table 2-75 below.

Table 2-75: Sensitivity of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Low	Low
Castle Sinclair	Low	Low	Low
Whaligoe Steps	Low	Low	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Significance of Effect*

2.7.1.59 Based on the assessment of the sensitivity and magnitude, the significance effect on the tourism assets of the Proposed Development has been outlined in Table 2-76.

Table 2-76: Significance of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Negligible	Negligible	Negligible
Castle Sinclair	Negligible	Negligible	Negligible
Whaligoe Steps	Negligible	Negligible	Negligible
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

## Social Impact Assessment

### Population

- 2.7.1.60 Caledonia North, Caledonia South and OnTI have the potential to affect the labour market of the area around the epicentres of impact, such as the construction and operations ports and the OnTI in Aberdeenshire. This could have wider effects on the local population, which may in turn affect local services and socio-cultural dynamics.
- 2.7.1.61 Population growth, including short-term workers, depends on the number of employees needed, and the length of contracts. It will also depend on the local economy's capacity to provide additional services, as more local workers with expertise will reduce reliance on transient workers and short-term changes in population. There are distinct differences between ports in urban and rural areas and as a result the impact on demographic structures will depend on the port(s) selected.
- 2.7.1.62 The experience of demographic change will also be influenced by the demographic breakdown of the workers that are involved. For example, analysis by the Offshore Wind Industry Council (Offshore Wind Industry Council, 2023<sup>64</sup>) has found that the workforce in the sector is predominantly male and the majority of the workers are aged between 30 and 44. The share of females in the workforce has increased over time and there is a target for 33% of the workforce to be female by 2030.

2.7.1.63 How this increase in population will be experienced will depend on the size and demographics of the population surrounding the construction port. The demographic distribution varies across Scotland, including the urban and rural locations where potential key port locations are based. This is shown in Table 2-77 below which highlights the differences in demographics across Scotland’s rural and urban areas. Remote Rural Areas have an older population (National Records of Scotland, 2023<sup>12</sup>) with 12% aged 75 and over, compared to large Urban Areas which have a much greater share of people aged under 45. This is likely to influence how demographic changes are felt in each type of area.

Table 2-77: Age distribution in rural and urban areas, compared to offshore wind sector.

Age	Large Urban Areas	Remote Rural Areas	Offshore Wind Sector
Under 15	15%	14%	0%
15-19	5%	5%	1%
20 – 24	7%	4%	5%
25 – 29	9%	4%	10%
30 – 34	9%	5%	17%
35 – 39	8%	5%	19%
40 – 44	6%	5%	17%
45 – 49	6%	6%	11%
50 – 54	6%	8%	9%
55 – 59	7%	9%	6%
60 – 64	6%	8%	3%
65 – 69	5%	8%	1%
70 – 74	4%	7%	0%
75 and over	7%	12%	0%

2.7.1.64 Factors that affect the sensitivity of a community to any changes in demographics, and other population driven impacts include:

- Population – communities with larger populations will have lower sensitivity to demographic changes; and



- Demographic distribution – communities with balanced demographics will be less sensitive to changes in population.

#### *Magnitude of Impact - Aberdeenshire*

- 2.7.1.65 On average, the population in Aberdeenshire is expected to grow by an average 250 people annually.
- 2.7.1.66 As shown in Table 2-49 and Table 2-51, it is expected that the peak employment supported by Caledonia North and OnTI in Aberdeenshire will be 20 jobs. In the unlikely event that all of these jobs supported during the construction and development phase were transient, this would be equivalent to 8% of the projected annual population growth of Aberdeenshire. In line with the approach described in Table 2-23, the magnitude of this effect has been assessed as Low in Aberdeenshire.
- 2.7.1.67 It is expected that the peak employment supported by Caledonia South and OnTI in Aberdeenshire will be 20 jobs. In the unlikely event that all of these jobs supported during the construction and development phase were transient, this would be equivalent to 8% of the projected annual population growth of Aberdeenshire. In line with the approach described in Table 2-23, the magnitude of this effect has been assessed as High in Aberdeenshire.
- 2.7.1.68 It is expected that the peak employment supported by the Proposed Development in Aberdeenshire will be 40 jobs. In the unlikely event that all of these jobs supported during the construction and development phase were transient, this would be equivalent to 16% of the projected annual population growth of Aberdeenshire. In line with the approach described in Table 2-23, the magnitude of this effect has been assessed as Low in Aberdeenshire.

#### *Sensitivity of Receptor - Aberdeenshire*

- 2.7.1.69 The population of Aberdeenshire is demographically similar to Scotland as a whole. The population is growing, however the working age population is expected to decline. The sensitivity of the demographics receptors have been assessed as Low in Aberdeenshire.

#### *Significance of impact - Aberdeenshire*

- 2.7.1.70 Based on the assessment of both magnitude and sensitivity, the effect of the Caledonia North and OnTI construction on the community and social assets was assessed as Negligible for Aberdeenshire.
- 2.7.1.71 Based on the assessment of both magnitude and sensitivity, the effect of the Caledonia South and OnTI construction on the community and social assets was assessed as Negligible for Aberdeenshire.
- 2.7.1.72 Based on the assessment of both magnitude and sensitivity, the combined effect of the Proposed Development construction on the community and social assets was assessed as Negligible for Aberdeenshire.

*Magnitude of Impact – Primary Construction Port*

2.7.1.73 The level of employment that will be supported at the primary construction port will be dependent on the factors of magnitude identified above. A construction port in a rural area without adjacent support or supply companies would have a lower level of port side employment than one in an urban or industrialised area. The share of employment that is transient would also be dependent on the location of the port. The magnitude of the change of demographics therefore cannot be determined at this stage.

*Sensitivity of Receptor – Primary Construction Port*

2.7.1.74 The sensitivity of the accommodation demand in the communities around the primary construction port will also be determined by the characteristics of these areas. One of the key factors is the size of the population. A port in an urban area will have a lower demographic sensitivity than one in a sparsely populated rural area. The sensitivity of the change in demographics cannot be determined at this stage.

*Significance of impact – Primary Construction Port*

2.7.1.75 The significance of the impact on demographic change at the primary construction port cannot be assessed at this stage.

**Housing Demand and Availability**

2.7.1.76 High quality and affordable accommodation is an important issue for coastal communities. Temporary accommodation may also provide infrastructure for the tourism sector.

2.7.1.77 The Proposed Development may have an impact on the accommodation sector as a temporary increase in workers can increase the demand for accommodation.

2.7.1.78 The sensitivity of communities to housing impacts will be determined by how well the housing provision will be able to respond to both long- and short-term changes in demand. The sensitivity of local areas will depend on the size of the nearby population (including the Travel to Work Area), the current level of accommodation provision (including local hotels and other types of flexible housing), and the potential for growth in the sector in response to increased demand. The importance of overnight tourism, with visitors staying in the region's temporary accommodation, will also affect the sensitivity of the area.

2.7.1.79 Factors that affect the sensitivity of a community to any changes in demographics, and other population driven impacts include:

- Population – communities with larger populations will have lower sensitivity to changes in housing demand;
- Housing availability – the greater the availability of accommodation, the lower the sensitivity;

- Overnight tourism sector – Areas with lots of overnight tourism may be more sensitive to changes in accommodation use, particularly if overnight tourists support other businesses in the area;
- Housing supply responsiveness – Housing markets that have been able to respond quickly to changes in demand will be more resilient; and
- Housing affordability – the relative share of income that residents need to pay to cover accommodation costs will affect how resilient communities could be to changes in demand.

2.7.1.80 The main factor driving demand for temporary accommodation will be the size of the population increase. An increase in demand for temporary accommodation is likely to be experienced by owners of local accommodation businesses, e.g. hotels, bed and breakfast owners and caravan parks, as positive resulting in increased business especially during off-peak times (e.g. winter) when the business may otherwise be closed. This would be reflected in increased occupancy rates and may contribute to the sustainability of these businesses in the off season. For rural businesses, in particular, this may be an important social benefit, creating year-round work for people in the local area.

2.7.1.81 Should the local accommodation sector not have capacity to expand supply in response to increased demand, this may have a negative effect if tourist visitors are unable to access accommodation, particularly during peak times. Some tourism businesses may experience lower levels of activity, though this is likely to be offset by more demand from transient workers (e.g. going to restaurants and cafes) and demand that occurs during off-peak times, including off-peak demand for accommodation.

2.7.1.82 The main factors affecting the magnitude of change of housing demand impacts include:

- Demographic changes – a higher increase in population will lead to a higher increased demand for accommodation;
- Supply chain capacity – a higher demand for local services will increase the magnitude of impact; and
- Local tourism businesses – increased demand for accommodation may constrain supply of visitor accommodation, or could support the sector during the off-season period.

*Magnitude of Impact - Aberdeenshire*

2.7.1.83 It is estimated that the peak employment impacts during the construction of the OnTI would support 40 jobs in Aberdeenshire. In addition, it is estimated that the direct employment on site would require approximately 100 additional transient workers during the peak periods of construction. This is equivalent to less than 1% of the population of Aberdeenshire. The magnitude of the change of accommodation demand has been assessed as Low.

### *Sensitivity of Receptor - Aberdeenshire*

2.7.1.84 The population of Aberdeenshire is demographically similar to Scotland as a whole. The population is over 262,000 and the demand for housing has not been as strong in Aberdeenshire in recent years compared to the wider average for Scotland. The sensitivity of the accommodation market to changes in demand has been assessed as Low in Aberdeenshire.

### *Significance of impact - Aberdeenshire*

2.7.1.85 Based on the assessment of both magnitude and sensitivity, the effect of the Proposed Development construction on the housing demand was assessed as Negligible for Aberdeenshire. Similarly the effect of Caledonia North and OnTI, and Caledonia South and OnTI has also been assessed as negligible.

### *Magnitude of Impact – Primary Construction Port*

2.7.1.86 The level of employment that will be supported at the primary construction port will be dependent on the factors of magnitude identified above. A construction port in a rural area without adjacent support or supply companies would have a lower level of port side employment than one in an urban or industrialised area. The share of employment that is transient would also be dependent on the location of the port. The magnitude of the change of accommodation demand therefore cannot be determined at this stage.

### *Sensitivity of Receptor – Primary Construction Port*

2.7.1.87 The sensitivity of the accommodation demand in the communities around the primary construction port will also be determined by the characteristics of these areas. One of the key factors is the size of the population. A port in an urban area will have a lower accommodation demand sensitivity than one in a sparsely populated rural area. The sensitivity of the change in accommodation demand cannot be determined at this stage.

### *Significance of impact – Primary Construction Port*

2.7.1.88 The significance of the impact on housing demand at the primary construction port cannot be assessed at this stage.

## **Other Local Services Impacts**

2.7.1.89 Access to services, such as education and health is part of the fabric of local life in many places. A temporary increase in population may result in higher demand for these services. Depending on the characteristics of the area, this could contribute to sustaining services that might otherwise be at risk. Alternatively, it may put pressure on services with constrained capacity.

2.7.1.90 These services could include:

- Public and private sector;
- Educational services;

- Health services and social support;
- Police, fire, recreation, transport; and
- Local authority finances.

2.7.1.91 The Proposed Development may have an impact on these services as a temporary increase in workers can increase the demand.

2.7.1.92 Factors that affect the sensitivity of a community to any changes in demographics, and other population driven impacts include:

- Service capacity – services with greater capacity will have a greater innate ability to adapt to change; and
- Adaptability – the ability of services to adapt quickly to changes in demand will influence their sensitivity. This could include how these services access finance and the ability to recruit.

2.7.1.93 The main factor that will affect demand for health care services will be the temporary increase in population and the relative health of that population. Given that the majority of people who will undertake activities at ports will be of working age and in generally good health, they are expected to be less likely to access public health services, such as GPs, hospitals and social care, than the population as a whole (which is likely to include a higher share of older people who are more likely to need health services).

2.7.1.94 Demand for education services, e.g. schools, will be affected by whether there is an increase in the population under the age of 18. This will depend on whether transient workers have children and whether they bring these children with them. Given the length of construction contracts it is considered unlikely that there would be an increase in demand for schools specific to the construction of the Project. However, the O&M activities would require a permanent workforce and the potential cumulative effect of multiple offshore wind farms in Scottish waters, including the Project, would also create long term employment opportunities that could increase the demand for education services.

2.7.1.95 Demand for private services, such as cafes, restaurants and supermarkets, is likely to increase in line with population. This would be experienced positively by these businesses and the people employed within them. Increased footfall in towns and villages is likely to add to a place's vitality.

2.7.1.96 The main factors affecting the magnitude of change of housing demand impacts include:

- Demographic changes – a higher increase in population will lead to a higher increased service demand, relative to population size;
- Population demographics – the demographic distribution of the population change will influence the services that are in demand, particularly schools and hospitals;

- Timeframe of population change – long term population changes with subsequent long term demand changes for local services will stimulate further investment in service provision in the area; and
- Economic activity – services such as local government finances, which are dependent on economic activity in the area will be directly related to the economic impacts that occur in that area.

#### *Magnitude of Impact - Aberdeenshire*

2.7.1.97 It is estimated that the peak employment impacts during the construction of the OnTI would support 40 jobs in Aberdeenshire. In addition, it is estimated that the direct employment on site would require approximately 100 additional transient workers during the peak periods of construction. This is equivalent to less than 1% of the population of Aberdeenshire. The magnitude of the change of other local service demand has been assessed as Low.

#### *Sensitivity of Receptor - Aberdeenshire*

2.7.1.98 The population of Aberdeenshire is demographically similar to Scotland as a whole. The population is over 262,000 and the demand for services is in line with the Scottish average. The sensitivity of the other local services to changes in demand has been assessed as Low in Aberdeenshire.

#### *Significance of impact - Aberdeenshire*

2.7.1.99 Based on the assessment of both magnitude and sensitivity, the effect of the Proposed Development construction on the demand for other local services was assessed as Negligible for Aberdeenshire. Similarly the effect of Caledonia North and OnTI, and Caledonia South and OnTI has also been assessed as negligible.

#### *Magnitude of Impact – Primary Construction Port*

2.7.1.100 The level of employment that will be supported at the primary construction port will be dependent on the factors of magnitude identified above. A construction port in a rural area without adjacent support or supply companies would have a lower level of port side employment than one in an urban or industrialised area. The share of employment that is transient would also be dependent on the location of the port. The magnitude of the change of other local services demand therefore cannot be determined at this stage.

#### *Sensitivity of Receptor – Primary Construction Port*

2.7.1.101 The sensitivity of the demand for other local services in the communities around the primary construction port will also be determined by the characteristics of these areas. One of the key factors is the size of the population. A port in an urban area will have a lower sensitivity than one in a rural area. The sensitivity of the change in other local services demand cannot be determined at this stage.

*Significance of impact – Primary Construction Port*

2.7.1.102 The significance of the impact on other local services demand at the primary construction port cannot be assessed at this stage.

**Socio-cultural Impacts**

2.7.1.103 The activity surrounding the construction of an offshore wind farm can have impacts on the lives of residents near areas of activity, which can affect the character of a place. The General Advice produced by the Marine Analytical Unit defines Socio-cultural impacts to include:

- Lifestyles/quality of life;
- Gender issues; family structure;
- Social problems (e.g., crime, ill-health, deprivation);
- Human rights;
- Community stress and conflict; integration, cohesion and alienation; and
- Community character or image.

2.7.1.104 The introduction of a temporary economic activity, even though short-lived, can exert social and cultural influences on a community. While the duration might be limited, disruption caused by construction, noise, and increased traffic can affect residents' daily lives. Transient workforces can alter the social dynamics and interactions within the community, potentially leading to a disconnect between newcomers and long-term residents. However, temporary activities can also provide chances for community engagement, skill development, and cultural showcase, enriching the community's collective experience.

2.7.1.105 Studies of coastal communities (Scottish Government, 2022<sup>65</sup>) with lived experiences of offshore wind projects in Scotland have found that the majority (63%) of residents in these communities experienced no impact to their quality of life from offshore wind projects. For those who did note an impact on quality of life, the share of people who felt the impact had been positive (25%) was much greater than those who felt the impact had been negative (4%).

2.7.1.106 Similarly, the survey also asked respondents to consider how the offshore wind farms near them had had an impact on community relations. The majority of people (59%) reported there had been no impact as a result of the offshore wind farms and of those who did report an impact a greater share (16%) felt the impact had been positive compared to those who felt it had been negative (7%).

2.7.1.107 The survey also asked those with lived experiences of offshore wind farms in Scotland to describe how these developments had influenced the character of a community. The majority of respondents reported that there had been no impact and for those who did report an impact, more felt there had been a positive impact (21%) than a negative impact (9%).

Table 2-78: Overall, what impact, if any, would you say that offshore wind farms have had on...

<b>Age</b>	<b>...your Quality of Life</b>	<b>...Community relations</b>	<b>...Community character</b>
Strong positive impact	7%	6%	1%
Positive impact	18%	10%	20%
No impact	63%	59%	55%
Negative impact	2%	7%	7%
Strong negative impact	2%	0%	2%
Don't know/No answer	8%	18%	15%
Net effect	+21%	+9%	+12%

- 2.7.1.108      The factors which affect how people feel about community or quality of life impacts of offshore wind will depend on a wide variety of existing community characteristics and the personal experiences of individuals. These will be particular to the communities in which the impacts occur.
  
- 2.7.1.109      Human rights is one of the outcomes of the Scottish Government's National Performance Framework: "We recognise and protect the intrinsic value of all people and are a society founded on fairness, dignity, equality and respect. We demonstrate our commitment to these principles through the way we behave with and treat each other, in the rights, freedoms and protections we provide, and in the democratic, institutional and legal frameworks through which we exercise power" (Scottish Government, 2018)<sup>66</sup>.
  
- 2.7.1.110      Balancing the positive environmental aspects of offshore wind farms with the protection of communities' well-being and rights is key to achieving sustainable and responsible development. Construction activities may influence human rights issues by, for example: changes to the local environment affecting community cohesion and impacting on the right to community life; ensuring labour rights and safety for workers involved in construction; involving communities in decision-making processes to uphold the right to participation. This offshore wind farm presents opportunities for positive impact in line with human rights principles. Balancing livelihoods, fostering community unity, ensuring resource access, preserving culture, and prioritising well-being all demonstrate commitment to human rights. Through inclusivity, ensuring safety, and addressing community impacts, this Project can align with the National Performance Framework's outcome on Human Rights.



- 2.7.1.111 Factors that affect the sensitivity of a community to socio-cultural impacts include:
- Wellbeing – the wellbeing and quality of life currently experienced by individuals in the community and sensitivity of factors that drive these;
  - Community cohesion – the current level of community cohesion will contribute to how well communities can navigate change;
  - Agency – areas with empowered communities may be able to engage more effectively with projects at an early stage; and
  - Socio-economic characteristics – communities with better socio-economic outcomes will have more resilience to change against social problems.
- 2.7.1.112 The magnitude of any change in socio-cultural impacts will be dependent on the specific impact that is being assessed.
- 2.7.1.113 Particular care would be needed in assessing those impacts based on an individuals' perception, including impacts around quality of life and community cohesion and character. Net effects could hide considerable splits within communities and therefore the magnitude of change will depend on the gross number of individuals who report a change in perception-based impacts.
- 2.7.1.114 Perception based impacts are also liable to change over time, particularly as more details of the Project emerge. Public perceptions of offshore wind projects generally improve over time. In communities with lived experiences of offshore wind farms in Scotland, 19% said that the benefits to the local community were better than they had expected compared to 3% who said they were worse. It is therefore crucial to understand what impact is being measured, as there is likely to be a difference between actual and perceived impacts.
- 2.7.1.115 Many of the socio-cultural impacts are also secondary effects of other impacts identified elsewhere in this assessment as in the EIAR. Therefore, the magnitude of these effects and how they are felt within the communities are important factors that will drive the magnitude of the socio-cultural impacts.
- 2.7.1.116 The main factors affecting the magnitude of change of socio-cultural impacts include:
- Gross changes in perception – share of individuals who perceived changes to perception based impacts as a result of the Proposed Development, including those who experienced positive and negative impacts;
  - Initial perceptions of offshore wind – initial perceptions of the project and in particular an understanding of the characteristics of the Proposed Development could influence the socio-cultural effects;

- Scale of impacts contributing to socio-cultural effects – increased magnitude of effects that are perceived to be either positive or negative by communities will impact the magnitude of any social effects; and
- Timing of assessment – assessing socio-cultural impacts at an early stage may overestimate negative impacts and represent perceptions rather than impacts.

*Magnitude of Impact - Aberdeenshire*

2.7.1.117 Aberdeenshire, particularly the area around the OnTI, has previous experience of offshore wind projects and associated onshore infrastructure. Therefore it would be reasonable to assume that the gross changes in perception will be informed by previous experience of offshore wind projects. This would imply that the impacts on community character, quality of life and community relations would be in line with the finding described in Table 2-78. In particular, the majority of the community would experience no change to socio-cultural receptors and for those who did the net experience would be positive. Therefore, the magnitude of socio-cultural impacts has been assessed as Low.

*Sensitivity of Receptor - Aberdeenshire*

2.7.1.118 The levels of wellbeing, including self-reported life satisfaction, and general socio-economic indicators are higher in Aberdeenshire than Scotland or the UK as a whole. Therefore the sensitivity of Aberdeenshire to socio-cultural impacts has been assessed as Low.

*Significance of impact - Aberdeenshire*

2.7.1.119 Based on the assessment of both magnitude and sensitivity, the effect of the Proposed Development construction on socio-cultural receptors was assessed as Negligible for Aberdeenshire. Similarly, the effect of Caledonia North and OnTI, and Caledonia South and OnTI has also been assessed as negligible.

*Magnitude of Impact – Primary Construction Port*

2.7.1.120 The magnitude of impact is determined by the level of activity that will occur at the construction port, the resulting environmental effects and perceptions and experience of the communities around the primary construction port. There is the potential for these all to vary a lot depending on where the port is located and if it has previous ongoing experience of offshore wind or other major infrastructure projects. The magnitude of the change of other local services demand therefore cannot be determined at this stage.

*Sensitivity of Receptor – Primary Construction Port*

2.7.1.121 The sensitivity of the socio-cultural receptors in the communities around the primary construction port will also be determined by the characteristics of these areas. The sensitivity of the change in other local services demand cannot be determined at this stage.

*Significance of impact – Primary Construction Port*

2.7.1.122 The significance of the impact on socio-cultural effects at the primary construction port cannot be assessed at this stage.

**2.7.2 Operation**

**Economic Impact**

2.7.2.1 The economic impact during the operation phase is generated by the increase spend in the economy required to develop and build the Proposed Development. This generates increased GVA and employment.

**Magnitude of Impact**

2.7.2.2 The first step in estimating the economic impact associated with the operational stage of the Proposed Development was identifying the level of expenditure associated with of the operation phase. Information from the SCDS (Ocean Winds, 2023<sup>67</sup>) and BiGGAR Economics model of OWF impacts was used to assess the total spend by category in each study area. Information in the SCDS provided the total level of expenditure over the first six years of operation, and this was divided by six to estimate the annual spend.

2.7.2.3 As shown in Table 2-79, £71 million of contracts are expected to be secured in Scotland and a further £8 million in the rest of the UK.

Table 2-79: Supply Chain Development Statement – Operation (Commitment scenario) Caledonia Offshore Wind Farm, Scotland and the UK.

Parameters	Scotland	Rest of UK
Total Operation (Annual)	£71 m	£8 m

2.7.2.4 The expenditure associated with the operation of the Proposed Development presented in the SCDS is expected to be split equally between Caledonia North and Caledonia South, and the assessment of the potential effects on socio-economics, tourism and recreation follows this assumption.

2.7.2.5 This spending is then analysed, based on BiGGAR Economics analysis and work undertaken by BVG Associates on the costs associated with offshore wind farms (BVG Associated, 2019<sup>26</sup>). The share of spend secured in each study area was assumed based on information provided by the Applicant and BiGGAR Economics analysis of the SCDS (more detail is provided in Section 3 of Volume 7F, Appendix 2-1: Socio-economics Technical Report).

2.7.2.6 As can be seen in Table 2-80, it is anticipated that total operation expenditure required for the Proposed Development (Offshore) will be £70 million in Scotland and £78 million will be spent in the UK.

Table 2-80: Proposed Development (Offshore) Spending, Scotland and the UK (SCDS).

Parameters	Scotland	UK
Total Operation	£70 m	£78 m

2.7.2.7 As can be seen in Table 2-81, it is anticipated that total capital investment required for the Proposed Development (Onshore) will be £1 million in Scotland and £1 million will be spent in the UK.

Table 2-81: Proposed Development (Onshore) Spending, Scotland and the UK (SCDS).

Parameters	Scotland	UK
Total Operation	£1 m	£1 m

2.7.2.8 Applying turnover per employee and turnover/GVA ratios for the relevant sectors, as shown in Table 2-82, Table 2-83, and Table 2-84, it was estimated that the operations direct annual economic impact of the Proposed Development (Offshore) would be £11 million GVA and 149 years of employment in North Scotland, £12 million GVA and 155 years of employment in Scotland, and £13 million GVA and 172 years of employment in the UK.

2.7.2.9 As shown in as shown in Table 2-82, Table 2-83, and Table 2-84, it was estimated that the operations direct annual economic impact of the Proposed Development (Offshore) would be £22 million GVA and 299 jobs in North Scotland, £24 million GVA and 309 jobs in Scotland, and £27 million GVA and 344 jobs in the UK.

Table 2-82: Proposed Development (Offshore) Operations Direct Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Total	£11 m	149	£11 m	149	£22 m	299

Note: totals may not sum due to rounding.

Table 2-83: Proposed Development (Offshore) Operations Direct Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	£12 m	155	£12 m	155	£24 m	309

Note: totals may not sum due to rounding.

Table 2-84: Proposed Development (Offshore) Operations Direct Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	£13 m	172	£13 m	172	£27 m	344

Note: totals may not sum due to rounding.

2.7.2.10 For the Proposed Development (Onshore, Phase 1 and Phase 2) elements, as shown in Table 2-85, Table 2-86, and Table 2-87, it was estimated that the operations direct economic impact would be <£1 million GVA and <10 jobs in Aberdeenshire, <£1 million GVA and <10 jobs in Scotland, and <£1 million GVA and <10 jobs in the UK.

2.7.2.11 As shown in Table 2-85, Table 2-86, and Table 2-87, it was estimated that the operations direct economic impact of the Proposed Development (Onshore) would be <£1 million GVA and <10 jobs in Aberdeenshire, <£1 million GVA and <10 jobs in Scotland, and <£1 million GVA and <10 jobs in the UK.

Table 2-85: Proposed Development (Onshore) Operations Direct Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	<£1 m	<10	<£1 m	<10	<£1 m	<10

Note: totals may not sum due to rounding.

Table 2-86: Proposed Development (Onshore) Operations Direct Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	<£1 m	<10	<£1 m	<10	<£1 m	<10

Note: totals may not sum due to rounding.

Table 2-87: Proposed Development (Onshore) Operations Direct Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	<£1 m	<10	<£1 m	<10	<£1 m	<10

Note: totals may not sum due to rounding.

2.7.2.12 As shown in Table 2-88, Table 2-89, and Table 2-90, it was estimated that the operations total economic impact of the Proposed Development would be £22 million GVA and 302 jobs in North Scotland, £24 million GVA and 305 jobs in Scotland, and £27 million GVA and jobs in the UK.

Table 2-88: Total Proposed Development Operations Direct Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	£11 m	151	£11 m	151	£22 m	302

Note: totals may not sum due to rounding.

Table 2-89: Total Proposed Development Operations Direct Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	£12 m	152	£12 m	152	£24 m	305

Note: totals may not sum due to rounding.

Table 2-90: Total Proposed Development Operations Direct Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
<b>Total</b>	<b>£14 m</b>	<b>172</b>	<b>£14 m</b>	<b>172</b>	<b>£27 m</b>	<b>343</b>

Note: totals may not sum due to rounding.

2.7.2.13 Applying GVA and employment multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-91, Table 2-92, and Table 2-93, it was estimated that the operations total economic impact of Proposed Development (Offshore) would be £14 million GVA and 190 jobs in North Scotland, £21 million GVA and 270 jobs in Scotland, and £36 million GVA and 480 jobs in the UK.

2.7.2.14 As shown in Table 2-91, Table 2-92, and Table 2-93, it was estimated that the operations total economic impact of the Proposed Development (Offshore) would be £28 million GVA and 379 jobs in North Scotland, £41 million GVA and 540 jobs in Scotland, and £73 million GVA and 960 jobs in the UK.

Table 2-91: Proposed Development (Offshore) Operations Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	£11 m	149	£11 m	149	£22 m	298
Indirect	£2 m	20	£2 m	20	£4 m	40
<b>Total</b>	<b>£13 m</b>	<b>170</b>	<b>£13 m</b>	<b>170</b>	<b>£26 m</b>	<b>338</b>
Induced	£2 m	20	£2 m	20	£4 m	40
<b>Total (with Induced)</b>	<b>£14 m</b>	<b>190</b>	<b>£14 m</b>	<b>190</b>	<b>£28 m</b>	<b>379</b>

Note: totals may not sum due to rounding.

Table 2-92: Proposed Development (Offshore) Operations Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£12 m	150	£12 m	150	£24 m	310
Indirect	£5 m	70	£5 m	70	£10 m	140
<b>Total</b>	<b>£17 m</b>	<b>230</b>	<b>£17 m</b>	<b>230</b>	<b>£34 m</b>	<b>450</b>
Induced	£4 m	40	£4 m	40	£7 m	80
<b>Total (with Induced)</b>	<b>£21 m</b>	<b>270</b>	<b>£21 m</b>	<b>270</b>	<b>£41 m</b>	<b>540</b>

Note: totals may not sum due to rounding.

Table 2-93: Proposed Development (Offshore) Operations Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£13 m	170	£13 m	170	£27 m	340
Indirect	£12 m	170	£12 m	170	£24 m	350
<b>Total</b>	<b>£26 m</b>	<b>350</b>	<b>£26 m</b>	<b>350</b>	<b>£52 m</b>	<b>690</b>
Induced	£10 m	130	£10 m	130	£21 m	260
<b>Total (with Induced)</b>	<b>£36 m</b>	<b>480</b>	<b>£36 m</b>	<b>480</b>	<b>£73 m</b>	<b>960</b>

Note: totals may not sum due to rounding.

2.7.2.15 Applying GVA and employment multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-94, Table 2-95 and Table 2-96, it was estimated that the operations total economic impact of Phase 1 and 2 of the Proposed Development (Onshore) would be <£1 million GVA and <10 years of employment in North Scotland, <£1 million GVA and <10 years of employment in Scotland, and <£1 million GVA and <10 years of employment in the UK.

2.7.2.16 As shown in Table 2-94, Table 2-95 and Table 2-96, it was estimated that the operations total economic impact of the Proposed Development (Onshore) would be <£1 million GVA and <10 years of employment in North Scotland, <£1 million GVA and <10 years of employment in Scotland, and <£1 million GVA and <10 years of employment in the UK.



Table 2-94: Proposed Development (Onshore) Operations Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	<£1 m	<10	<£1 m	<10	<£1 m	<10
Indirect	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>
Induced	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total (with Induced)</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>

Note: totals may not sum due to rounding.

Table 2-95: Proposed Development (Onshore) Operations Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	<£1 m	<10	<£1 m	<10	<£1 m	<10
Indirect	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>
Induced	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total (with Induced)</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>

Note: totals may not sum due to rounding.

Table 2-96: Proposed Development (Onshore) Operations Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	<£1 m	<10	<£1 m	<10	<£1 m	<10
Indirect	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>
Induced	<£1 m	<10	<£1 m	<10	<£1 m	<10
<b>Total (with Induced)</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>	<b>&lt;£1 m</b>	<b>&lt;10</b>

Note: totals may not sum due to rounding.

2.7.2.17 For the Proposed Development (Caledonia North and OnTI, Caledonia South and OnTI), as shown in Table 2-97, Table 2-98, and Table 2-99, it was estimated that the operations total economic impact would be £14 million GVA and 196 jobs in North Scotland, £21 million GVA and 273 jobs in Scotland, and £36 million GVA and 485 jobs in the UK.

2.7.2.18 As shown in Table 2-97, Table 2-98, and Table 2-99, it was estimated that the operations total economic impact of the Proposed Development would be £28 million GVA and 391 jobs in North Scotland, £42 million GVA and 545 jobs in Scotland, and £73 million GVA and 970 jobs in the UK.

Table 2-97: Total Proposed Development Operations Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	£11 m	151	£11 m	151	£22 m	302
Indirect	£2 m	23	£2 m	23	£4 m	46
<b>Total</b>	<b>£13 m</b>	<b>174</b>	<b>£13 m</b>	<b>174</b>	<b>£26 m</b>	<b>348</b>
Induced	£2 m	21	£2 m	21	£4 m	42
<b>Total (with Induced)</b>	<b>£14 m</b>	<b>196</b>	<b>£14 m</b>	<b>196</b>	<b>£29 m</b>	<b>391</b>

Note: totals may not sum due to rounding.

Table 2-98: Total Proposed Development Operations Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	£12 m	152	£12 m	152	£24 m	313
Indirect	£5 m	71	£5 m	71	£10 m	141
<b>Total</b>	<b>£17 m</b>	<b>232</b>	<b>£17 m</b>	<b>232</b>	<b>£35 m</b>	<b>455</b>
Induced	£4 m	40	£4 m	40	£7 m	81
<b>Total (with Induced)</b>	<b>£21 m</b>	<b>273</b>	<b>£21 m</b>	<b>273</b>	<b>£42 m</b>	<b>545</b>

Note: totals may not sum due to rounding.

Table 2-99: Total Proposed Development Operations Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Jobs	GVA	Jobs	GVA	Jobs
Direct	£14 m	172	£14 m	172	£27 m	343
Indirect	£12 m	172	£12 m	172	£24 m	353
<b>Total</b>	<b>£26 m</b>	<b>353</b>	<b>£26 m</b>	<b>353</b>	<b>£52 m</b>	<b>697</b>
Induced	£11 m	131	£11 m	131	£21 m	263
<b>Total (with Induced)</b>	<b>£36 m</b>	<b>485</b>	<b>£36 m</b>	<b>485</b>	<b>£73</b>	<b>970</b>

Note: totals may not sum due to rounding.

2.7.2.19 This impact is expected to take place across the 35 year lifetime of the Proposed Development. Over this period, as shown in Table 2-100, Table 2-101 and Table 2-102, the total impact of the Proposed Development (Offshore) (Caledonia North and Caledonia South) was estimated to be £220 million (£102 million Net Present Value (NPV)), £299 million GVA (£139 million NPV) in Scotland, and £447 million GVA (£208 million NPV) in the UK.

Table 2-100: Total Proposed Development (Offshore) Operations Impact, North Scotland (Lifetime).

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Total GVA	£110 m	£110 m	£220 m
Total GVA (NPV)	£51 m	£51 m	£102 m

Note: totals may not sum due to rounding.

Table 2-101: Total Proposed Development (Offshore) Operations Impact, Scotland (Lifetime).

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Total GVA	£150 m	£150 m	£299 m
Total GVA (NPV)	£70 m	£70 m	£139 m

Note: totals may not sum due to rounding.

Table 2-102: Total Proposed Development (Offshore) Operations Impact, UK (Lifetime).

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Total GVA	£223 m	£223 m	£447 m
Total GVA (NPV)	£104 m	£104 m	£208 m

Note: totals may not sum due to rounding.

2.7.2.20 This impact is expected to take place across the 35 year lifetime of the Proposed Development. Over this period, as shown in Table 2-103, Table 2-104 and Table 2-105, the total impact of the Proposed Development (Onshore) was estimated to be £3 million GVA (£1 million Net Present Value (NPV)) in North Scotland, £4 million GVA (£2 million NPV) in Scotland, and £6 million GVA (£3 million NPV) in the UK.

Table 2-103: Total Proposed Development (Onshore) Operations Impact, North Scotland (Lifetime).

Parameters	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Total GVA	£2 m	£2 m	£3 m
Total GVA (NPV)	£1 m	£1 m	£1 m

Note: totals may not sum due to rounding.

Table 2-104: Total Proposed Development (Onshore) Operations Impact, Scotland (Lifetime).

Parameters	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Total GVA	£2 m	£2 m	£4 m
Total GVA (NPV)	£1 m	£1 m	£2 m

Note: totals may not sum due to rounding.

Table 2-105: Total Proposed Development (Onshore) Operations Impact, UK (Lifetime).

Parameters	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Total GVA	£3 m	£3 m	£6 m
Total GVA (NPV)	£1 m	£1 m	£3 m

Note: totals may not sum due to rounding.

2.7.2.21 For the Proposed Development (Caledonia North and OnTI, Caledonia South and OnTI), as shown Table 2-106, Table 2-107 and Table 2-108, it was estimated that that the total economic impact over the lifetime of the Proposed Development would be £223 million GVA (£104 million Net Present Value (NPV)) in North Scotland, £303 million GVA (£141 million NPV) in Scotland, and £453 million GVA (£211 million NPV) in the UK.

Table 2-106: Total Proposed Development Operations Impact, North Scotland (Lifetime).

Parameters	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Total GVA	£111 m	£111 m	£223 m
Total GVA (NPV)	£52 m	£52 m	£104 m

Note: totals may not sum due to rounding.

Table 2-107: Total Proposed Development Operations Impact, Scotland (Lifetime).

Parameters	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Total GVA	£151 m	£151 m	£303 m
Total GVA (NPV)	£70 m	£70 m	£141 m

Note: totals may not sum due to rounding.

Table 2-108: Total Proposed Development Operations Impact, UK (Lifetime).

Parameters	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Total GVA	£226 m	£226 m	£453 m
Total GVA (NPV)	£105 m	£105 m	£211 m

Note: totals may not sum due to rounding.

2.7.2.22 The magnitude of impacts during the operations phase for the Proposed Development (Offshore) for each study area are presented in Table 2-109, Table 2-110, and Table 2-111.

Table 2-109: Magnitude – Proposed Development (Offshore) Impact, North Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	170	170	340
% of Construction Sector Employment in Study Area	4.1%	4.1%	8.2%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-110: Magnitude – Proposed Development (Offshore) Impact, Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	230	230	460
% of Construction Sector Employment in Study Area	0.9%	0.9%	1.7%
<b>Magnitude of Impact</b>	<b>Medium</b>	<b>Medium</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-111: Magnitude – Proposed Development (Offshore) Impact, UK.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	350	350	700
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

2.7.2.23 The magnitude of impacts during the operations phase for the Proposed Development (Onshore) for each study area are presented in Table 2-112, Table 2-113, and Table 2-114.

Table 2-112: Magnitude – Proposed Development (Onshore) Impact, Aberdeenshire.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	<10	<10	<10
% of Construction Sector Employment in Study Area	0.1%	0.1%	0.1%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-113: Magnitude – Proposed Development (Onshore) Impact, Scotland.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	<10	<10	<10
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-114: Magnitude – Proposed Development (Onshore) Impact, UK.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	<10	<10	<10
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

2.7.2.24 The magnitude of impacts during the operations phase for the Proposed Development for each study area are presented in Table 2-115, Table 2-116, and Table 2-117.

Table 2-115: Magnitude – Proposed Development Impact, North Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	174	174	348
% of Construction Sector Employment in Study Area	0.7%	0.7%	1.4%
<b>Magnitude of Impact</b>	<b>Medium</b>	<b>Medium</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-116: Magnitude – Proposed Development Impact, Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	232	232	465
% of Construction Sector Employment in Study Area	0.1%	0.1%	0.2%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-117: Magnitude – Proposed Development Impact, UK.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	353	353	707
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

### Sensitivity of Receptor

- 2.7.2.25 The sensitivity of an economy is based on its responsiveness to change, its relative diversity (more diverse economies are less sensitive) and growth trajectory (for example is the number of jobs increasing or decreasing).
- 2.7.2.26 The Aberdeenshire economy employs 112,850 people, and therefore has been assessed as medium sensitivity.
- 2.7.2.27 Given the size of the North Scotland economy, employs 439,600 people, it has been assessed as low sensitivity.
- 2.7.2.28 Given the size and diversity of the Scottish economy, which employs 2.6 million people, it has been assessed as low sensitivity.
- 2.7.2.29 Similarly, the UK economy, which employs 32.2 million people, has been assessed as being of negligible sensitivity.

### Significance of Effect

- 2.7.2.30 The significance of the operations impacts for the Proposed Development (Offshore) for each study area are presented in Table 2-118, Table 2-119, and Table 2-120.

Table 2-118: Significance of Operations Economic Impacts - Proposed Development (Offshore), North Scotland.

	Caledonia North	Caledonia South	Proposed Development (Offshore)
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>



Table 2-119: Significance of Operations Economic Impacts – Proposed Development (Offshore), Scotland.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	Medium	Medium	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-120: Significance of Operations Economic Impacts - Proposed Development (Offshore), UK.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.2.31 The significance of the operations impacts for the Proposed Development (Onshore) for each study area are presented in for each study area are presented in Table 2-121, Table 2-122, and Table 2-123.

Table 2-121: Significance of Operations Economic Impacts – Proposed Development (Onshore), Aberdeenshire.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Medium	Medium	Medium
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-122: Significance of Operations Economic Impacts – Proposed Development (Onshore), Scotland.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-123: Significance of Operations Economic Impacts – Proposed Development (Onshore), UK.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.2.32 The significance of the operations impacts for the Proposed Development for each study area are presented in Table 2-124, Table 2-125, and Table 2-126.

Table 2-124: Significance of Operations Economic Impacts – Proposed Development, North Scotland.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Medium	Medium	High
Sensitivity	low	low	low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-125: Significance of Operations Economic Impacts – Proposed Development, Scotland.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	low	low	low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-126: Significance of Operations Economic Impacts – Proposed Development, UK.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

### Secondary Economic Impacts from Other Environmental Effects

2.7.2.33 There is no secondary economic impact from other environmental factors during the operational phase. See Section 2.9 for more details.

### Tourism and Recreation Impacts

2.7.2.34 The assessment considers whether the operation of the Proposed Development would affect any of the tourism attractions identified in Section 2.4.4, accounting for any significant effects identified in other chapters.

2.7.2.35 The following chapters have been reviewed to assess effects arising from onshore infrastructure:

- Volume 5, Chapter 5: Terrestrial Archaeology and Cultural Heritage;
- Volume 5, Chapter 2: Land Use;
- Volume 5, Chapter 8: Airborne Noise and Vibration;
- Volume 3, Chapter 8: Traffic and Transport; and
- Volume 5, Chapter 4: Landscape and Visual Assessment.

2.7.2.36 The following chapters have been reviewed to assess effects arising from offshore infrastructure:

- Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation; and
- Volume 2, Chapter 12: Seascape, Landscape and Visual Impact Assessment.

## Onshore

2.7.2.37 As shown in Table 2-127 where no significant effects have been identified, this is indicated with an X. Where a potential significant effect has been identified, this is indicated with a ✓.

Table 2-127: Significant Effects Identified on Tourism and Recreation Assets – Onshore.

Attraction	Airborne Noise	Shipping and Navigation	Infrastructure and Other Users	LVIA	Archaeology and Cultural Heritage	Traffic and Transport
North East Shooting Breaks	X	X	X	✓	X	X
The Boyndie Visitor Centre	X	X	X	X	X	X
Inchdrewer Castle	X	X	X	X	X	X
Eden Castle	X	X	X	X	X	X
Boyne Castle	X	X	X	X	X	X
Delgatie Castle	X	X	X	X	X	X
Banff Harbour Marina	X	X	X	X	X	X
Banff Castle	X	X	X	X	X	X
Duff House	X	X	X	X	X	X
Duff House Royal Golf Club	X	X	X	X	X	X
Museum of Banff	X	X	X	X	X	X
St Mary's Parish Church	X	X	X	X	X	X
Turriff Golf Club	X	X	X	X	X	X
Macduff Marine Aquarium	X	X	X	X	X	X
New Deer Showground	X	X	X	X	X	X
Suds Surf School	X	X	X	X	X	X
Sandend Beach	X	X	X	X	X	X
Haddo House	X	X	X	X	X	X
Fyvie Castle	X	X	X	X	X	X
Bennachie Forest	X	X	X	X	X	X
Castle Fraser	X	X	X	X	X	X
Crathes Castle	X	X	X	X	X	X

2.7.2.38 Potential significant effects have been identified in Volume 5, Chapter 4: Landscape and Visual Impact Assessment, which affect the tourism attractions identified in Section 2.4.4. The significant effect identified is the landscape character within 3km of the Onshore Substation Site. The only tourism attraction within this area is the North East Shooting Breaks.

*Magnitude of Impact*

2.7.2.39 The magnitude of the effect on the tourism assets has been assessed after consideration of other environmental factors identified elsewhere in the EIAR that will have a significant impact on the tourism economy or tourism assets.

2.7.2.40 The only tourism asset which has been identified as being significantly affected with reference to the other chapters is North East Shooting Breaks. The significant effect identified is the landscape character within 3km of the Onshore Substation Site. The landscape setting is not the fundamental driver of the decision to participate in the activities at North East Shooting Breaks. Therefore, the magnitude of the impact has been assessed as low.

Table 2-128: Magnitude of Tourism Attraction Impacts – Onshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North East Shooting Breaks	Low	Low	Low

*Sensitivity of Receptor*

2.7.2.41 The sensitivities of the tourism assets have been outlined below.

Table 2-129: Tourism Asset Sensitivities – Onshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North East Shooting Breaks	Negligible	Negligible	Negligible

*Significance of Effect*

2.7.2.42 Based on the assessment of the sensitivity and magnitude, the significance effect on the tourism assets has been outlined below.

Table 2-130: Significance of Tourism Attraction Impacts – Onshore.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
North East Shooting Breaks	Negligible (Not Significant)	Negligible (Not Significant)	Negligible (Not Significant)

**Offshore**

- 2.7.2.43 As discussed in Volume 2, Chapter 12: Seascape, Landscape and Visual Impact Assessment there are expected to be significant visual impacts in Caithness and Aberdeenshire.
- 2.7.2.44 In Caithness, moderate significant visual impacts were identified at the Viewpoint 4: Keiss, Viewpoint 5: Wick (path south of South View), Viewpoint 6: Sarclet and Viewpoint 8: Whaligoe Steps.
- 2.7.2.45 On this basis, it was concluded that a 27km section of coast between Whaligoe and Keiss is expected to experience moderate significant visual impact effect, with a further 17km section between Wick and Hill of Harley experiencing significant cumulative effects. These effects were associated with Caledonia North.
- 2.7.2.46 In Aberdeenshire, moderate (borderline) significant visual impacts were identified at Viewpoint 17: Portsoy, Viewpoint 18: MacDuff and Viewpoint 19: Gardenstown.
- 2.7.2.47 On this basis, a 17km section of coast between Portsoy and Gardenstown is expected to experience moderate (borderline) significant visual impact effects. These effects were associated with Caledonia South.

*Magnitude of Impact*

- 2.7.2.48 As identified in the baseline assessment (Section 2.4), none of the main regional attractions in Caithness are located within the section of coast between Keiss and Whaligoe Steps. Visitors within the Caithness TRSA who are on the North Coast 500 coastal route are in the area due to the various attractions along the route, and therefore their behaviour is not expected to change. Therefore, the impact has been assessed as negligible.
- 2.7.2.49 For some of the local attractions (Wick Heritage Museum and Pulteney Distillery) views of the sea are not considered to be key features, and therefore they would not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible.
- 2.7.2.50 For Keiss Castle and Castle Sinclair, both of which are ruined castles located on the coastline, the predominant features are their historical significance and their dramatic position on the coast. While the visual impact may have some affect, it is not expected to substantially alter visitor behaviour. Therefore, the effect has been assessed as low.

- 2.7.2.51 At Whaligoe Steps the key features are the history of the attraction, which was previously used by fishers bringing the catch ashore, and the dramatic nature of the steps cut into the cliff. Views towards the sea are appreciated when visitors are in the harbour itself, as well as the view of the stacks and cliffs.
- 2.7.2.52 Though there is potential for the visual impact to affect visitor behaviour, given the appearance of existing WTGs from Beatrice OWF and Moray East OWF and the key features of the attraction, it is not expected that the additional turbines will substantially reduce the number of visitors. As a result, the impact has been assessed as low.
- 2.7.2.53 For Banff Harbour Marina, the key feature for visitors is the ability to go out to sea in one of the pleasure craft. This is not expected to be affected by the visual impact and therefore the effect has been assessed as negligible.
- 2.7.2.54 The main attraction of Banff Castle is its historical significance, which will not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible. Similarly, the key feature of MacDuff Marine Aquarium is the visible sea life, which is not expected to be affected by the Proposed Development. Therefore, the effect has been assessed as negligible.
- 2.7.2.55 The magnitude of impact associated with each attractions is presented in Table 2-131 below.

Table 2-131: Magnitude of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Negligible	Low
Castle Sinclair	Low	Negligible	Low
Whaligoe Steps	Low	Negligible	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Sensitivity*

- 2.7.2.56 In Caithness, the North Coast 500 is considered to be resistant to changes associated with visual impact because there are a variety of attractions along the route that attract people. Therefore the sensitivity has been assessed as negligible. Similarly, Wick Heritage Museum, Pulteney Distillery, Banff Harbour Marina, Banff Castle and MacDuff Marine Aquarium are considered to have negligible sensitivity, because views towards the sea are not considered to be a key part of their attraction.
- 2.7.2.57 Given their position on the coast and settings, Keiss Castle, Castle Sinclair and Whaligoe Steps may be affected by visual impacts, though there are a range of other factors (e.g., history) that are important in their attractiveness to visitors. Therefore, they are considered to have low sensitivity.
- 2.7.2.58 The sensitivity of each attraction is presented in Table 2-132 below.

Table 2-132: Sensitivity of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Low	Low
Castle Sinclair	Low	Low	Low
Whaligoe Steps	Low	Low	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Significance of Effect*

- 2.7.2.59 Based on the assessment of the sensitivity and magnitude, the effect on the tourism assets of the Proposed Development has been outlined in Table 2-133 (no significant effects).



Table 2-133: Significance of Tourism Attraction Impacts – Offshore Operation.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Negligible	Negligible	Negligible
Castle Sinclair	Negligible	Negligible	Negligible
Whaligoe Steps	Negligible	Negligible	Negligible
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

## Community and Social Assets Impacts

2.7.2.60 The potential for the employment activities to have an impact on community and social assets has been scoped into this assessment for Aberdeenshire. This assessment considers the potential impacts associated with a change in demand for housing, educational and healthcare facilities as a result of this workforce. This also considers the socio-cultural effects that may occur during the operations phase.

### Magnitude of Impact

2.7.2.61 The potential change in demographics as a result of the development and operation of the Proposed Development is linked to the number of jobs that are supported and the activities that will occur during this phase. The level of activity during the operations phase will be lower than that of the construction phase. This applies to the activity in Aberdeenshire linked with the OnTI.

2.7.2.62 The magnitude of impacts is assessed as low for Aberdeenshire during the construction phase. Therefore, the magnitude of the impact on all community and social assets is also assessed as Low in Aberdeenshire.

2.7.2.63 Similarly, it is also not possible to assess the magnitude of effects on community and social assets for the primary operations port without knowing its location.

### Sensitivity of Receptor

- 2.7.2.64 In line with the approach outlined in the assessment during the construction phase, the sensitivity of the community and social asset receptors have been assessed as Low in Aberdeenshire.
- 2.7.2.65 Similarly, it is also not possible to assess the sensitivity community and social assets for the primary operations port without knowing its location.

### Significance of impact

- 2.7.2.66 Based on the assessment of both magnitude and sensitivity, the effect of the Caledonia North and OnTI operation on the community and social assets was assessed as Negligible for Aberdeenshire.
- 2.7.2.67 Based on the assessment of both magnitude and sensitivity, the effect of the Caledonia South and OnTI operation on the community and social assets was assessed as Negligible for Aberdeenshire.
- 2.7.2.68 Based on the assessment of both magnitude and sensitivity, the combined effect of the Proposed Development operation on the community and social assets was assessed as Negligible for Aberdeenshire.

## 2.7.3 Decommissioning

### Economic Impact

- 2.7.3.1 The economic impact during the decommissioning phase is generated by the increase spend in the economy required to decommission the Proposed Development. This generates increased GVA and employment.

### Magnitude of Impact

- 2.7.3.2 Decommissioning would be expected to take place after the operational lifespan of the Proposed Development, which means that there is a high degree of uncertainty about the level of expenditure associated with decommissioning, as well as the share that could be secured in Scotland and the UK.
- 2.7.3.3 BVG Associates has undertaken work to determine the potential spend (BVG Associates, 2019<sup>26</sup>; 2024<sup>52</sup>), and share of spend (BVG Associates, 2021<sup>51</sup>), which has informed the assessment. On this basis, as shown in Table 2-134, it was assumed that the spend associated with decommissioning of the offshore elements of the Proposed Development would be £85 million in North Scotland, Scotland and the UK, though this estimate is likely to be conservative. All of this expenditure is assumed to be captured in North Scotland, and as a result the spending across North Scotland, Scotland and the UK is the same.

Table 2-134: Scotland and UK Total Offshore Decommissioning Spending.

Parameters	North Scotland	Scotland	UK
Total	£85 m	£85 m	£85 m

2.7.3.4 As shown in Table 2-135, it is anticipated that total capital investment required for the Proposed Development (Onshore) will be £18 million in North Scotland, Scotland and the UK. All of this expenditure is assumed to be captured in North Scotland, and as a result the spending across North Scotland, Scotland and the UK is the same.

Table 2-135: Scotland and UK Total Proposed Development (Onshore) Decommissioning Spending.

Parameters	North Scotland	Scotland	UK
Total	£18 m	£18 m	£18 m

2.7.3.5 Applying turnover per employee and turnover/GVA ratios for the relevant sectors it was estimated. that the decommissioning direct annual economic impact of the Proposed Development (Offshore) (Caledonia North and Caledonia South) would be £13 million GVA and 151 years of employment in North Scotland, £13 million GVA and 151 years of employment in Scotland, and £13 million GVA and 151 years of employment in the UK.

2.7.3.6 As shown in Table 2-136, Table 2-137 and Table 2-138, it was estimated that the decommissioning direct annual economic impact of the Proposed Development (Offshore) would be £26 million GVA and 302 years of employment in North Scotland, Scotland and the UK.

Table 2-136: Proposed Development (Offshore) Decommissioning Direct Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Total	£13 m	151	£13 m	151	£26 m	302

Note: totals may not sum due to rounding.

Table 2-137: Proposed Development (Offshore) Decommissioning Direct Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£13 m</b>	<b>151</b>	<b>£13 m</b>	<b>151</b>	<b>£26 m</b>	<b>302</b>

Note: totals may not sum due to rounding.

Table 2-138: Proposed Development (Offshore) Decommissioning Direct Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£13 m</b>	<b>151</b>	<b>£13 m</b>	<b>151</b>	<b>£26 m</b>	<b>302</b>

Note: totals may not sum due to rounding.

2.7.3.7 For the Proposed Development (Onshore, Phase 1 and Phase 2), as shown in Table 2-139, Table 2-140 and Table 2-141, it was estimated that the decommissioning direct economic impact would be £1 million GVA and 10 years of employment in Aberdeenshire, £6 million GVA and 65 years of employment in Scotland, and £6 million GVA and 65 years of employment in the UK.

2.7.3.8 As shown in Table 2-139, Table 2-140 and Table 2-141, it was estimated that the decommissioning direct economic impact of the Proposed Development (Onshore) would be £2 million GVA and 20 years of employment in Aberdeenshire, £11 million GVA and 129 years of employment in Scotland, and £11 million GVA and 129 years of employment in the UK.

Table 2-139: Proposed Development (Onshore) Decommissioning Direct Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£1m</b>	<b>10</b>	<b>£1m</b>	<b>10</b>	<b>£2m</b>	<b>20</b>

Note: totals may not sum due to rounding.

Table 2-140: Proposed Development (Onshore) Decommissioning Direct Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£6 m</b>	<b>65</b>	<b>£6 m</b>	<b>65</b>	<b>£11 m</b>	<b>129</b>

Note: totals may not sum due to rounding.

Table 2-141: Proposed Development (Onshore) Decommissioning Direct Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£6 m</b>	<b>65</b>	<b>£6 m</b>	<b>65</b>	<b>£11 m</b>	<b>129</b>

Note: totals may not sum due to rounding.

2.7.3.9 For the Proposed Development (Caledonia North and OnTI, Caledonia South and OnTI), as shown in Table 2-142, Table 2-143 and Table 2-144 it was estimated that the decommissioning direct economic impact would be £16 million GVA and 181 years of employment in North Scotland, £16 million GVA and 181 years of employment in Scotland, and £161 million GVA and 181 years of employment in the UK.

2.7.3.10 As shown in Table 2-142, Table 2-143 and Table 2-144, it was estimated that the decommissioning direct economic impact of the Proposed Development would be £31 million GVA and 362 years of employment in Aberdeenshire, £31 million GVA and 362 years of employment in Scotland, and £31 million GVA and 362 years of employment in the UK.

Table 2-142: Total Proposed Development Decommissioning Direct Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£16 m</b>	<b>181</b>	<b>£16 m</b>	<b>181</b>	<b>£31 m</b>	<b>362</b>

Note: totals may not sum due to rounding.

Table 2-143: Total Proposed Development Decommissioning Direct Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£16 m</b>	<b>181</b>	<b>£16 m</b>	<b>181</b>	<b>£31 m</b>	<b>362</b>

Note: totals may not sum due to rounding.

Table 2-144: Total Proposed Development Decommissioning Direct Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
<b>Total</b>	<b>£16 m</b>	<b>181</b>	<b>£16 m</b>	<b>181</b>	<b>£31 m</b>	<b>362</b>

Note: totals may not sum due to rounding.

2.7.3.11 Applying GVA and employment multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-145, Table 2-146 and Table 2-147, it was estimated that the decommissioning total economic impact of the Proposed Development (Offshore) (North and South) would be £17 million GVA and 198 years of employment in North Scotland, £23 million GVA and 272 years of employment in Scotland, and £34 million GVA and 414 years of employment in the UK.

2.7.3.12 As shown in Table 2-145, Table 2-146 and Table 2-147, it was estimated that the decommissioning total economic impact of the Proposed Development (Offshore) would be £33 million GVA and 397 years of employment in North Scotland, £45 million GVA and 544 years of employment in Scotland, and £68 million GVA and 828 years of employment in the UK.

Table 2-145: Proposed Development (Offshore) Decommissioning Impact, North Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£13 m	151	£13 m	151	£26 m	302
Indirect	£2 m	25	£2 m	25	£4 m	50
<b>Total</b>	<b>£15 m</b>	<b>176</b>	<b>£15 m</b>	<b>176</b>	<b>£30 m</b>	<b>352</b>
Induced	£2 m	22	£2 m	22	£4 m	45
<b>Total (with Induced)</b>	<b>£17 m</b>	<b>198</b>	<b>£17 m</b>	<b>198</b>	<b>£33 m</b>	<b>397</b>

Note: totals may not sum due to rounding.

Table 2-146: Proposed Development (Offshore) Decommissioning Impact, Scotland.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£13 m	151	£13 m	151	£26 m	302
Indirect	£6 m	76	£6 m	76	£11 m	152
<b>Total</b>	<b>£19 m</b>	<b>227</b>	<b>£19 m</b>	<b>227</b>	<b>£37 m</b>	<b>454</b>
Induced	£4 m	45	£4 m	45	£8 m	90
<b>Total (with Induced)</b>	<b>£23 m</b>	<b>272</b>	<b>£23 m</b>	<b>272</b>	<b>£45 m</b>	<b>544</b>

Note: totals may not sum due to rounding.

Table 2-147: Proposed Development (Offshore) Decommissioning Impact, UK.

Parameters	Caledonia North		Caledonia South		Proposed Development (Offshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£13 m	151	£13 m	151	£26 m	302
Indirect	£12 m	147	£12 m	147	£23 m	294
<b>Total</b>	<b>£24 m</b>	<b>297</b>	<b>£24 m</b>	<b>297</b>	<b>£49 m</b>	<b>594</b>
Induced	£10 m	117	£10 m	117	£20 m	234
<b>Total (with Induced)</b>	<b>£34 m</b>	<b>414</b>	<b>£34 m</b>	<b>414</b>	<b>£68 m</b>	<b>828</b>

Note: totals may not sum due to rounding.

2.7.3.13 Applying GVA and employment multipliers and summing the direct, indirect and induced impacts, as shown in Table 2-148, Table 2-149 and Table 2-150, it was estimated that the decommissioning total economic impact of OnTI Phase 1 and 2 for Proposed Development (Onshore) would each be £3 million GVA and 41 years of employment in Aberdeenshire, £5 million GVA and 56 years of employment in Scotland, and £7 million GVA and 85 years of employment in the UK.

2.7.3.14 As shown in Table 2-148, Table 2-149 and Table 2-150, it was estimated that the decommissioning total economic impact of the Proposed Development (Onshore) would be £7 million GVA and 82 years of employment in Aberdeenshire, £9 million GVA and 112 years of employment in Scotland, and £14 million GVA and 171 years of employment in the UK.

Table 2-148: Proposed Development (Onshore) Decommissioning Impact, Aberdeenshire.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£3 m	31	£3 m	31	£5 m	62
Indirect	<£1 m	5	<£1 m	5	£1 m	10
<b>Total</b>	<b>£3 m</b>	<b>36</b>	<b>£3 m</b>	<b>36</b>	<b>£5 m</b>	<b>73</b>
Induced	<£1 m	5	<£1 m	5	£1 m	9
<b>Total (with Induced)</b>	<b>£3 m</b>	<b>41</b>	<b>£3 m</b>	<b>41</b>	<b>£7 m</b>	<b>82</b>

Note: totals may not sum due to rounding.

Table 2-149: Proposed Development (Onshore) Decommissioning Impact, Scotland.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£3 m	31	£3 m	31	£5 m	62
Indirect	£1 m	16	£1 m	16	£2 m	31
<b>Total</b>	<b>£4 m</b>	<b>47</b>	<b>£4 m</b>	<b>47</b>	<b>£8 m</b>	<b>94</b>
Induced	£1 m	9	£1 m	9	£2 m	19
<b>Total (with Induced)</b>	<b>£5 m</b>	<b>56</b>	<b>£5 m</b>	<b>56</b>	<b>£9 m</b>	<b>112</b>

Note: totals may not sum due to rounding.



Table 2-150: Proposed Development (Onshore) Decommissioning Impact, UK.

Parameters	OnTI Phase 1		OnTI Phase 2		Proposed Development (Onshore)	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£3 m	31	£3 m	31	£5 m	62
Indirect	£2 m	30	£2 m	30	£5 m	61
<b>Total</b>	<b>£5 m</b>	<b>61</b>	<b>£5 m</b>	<b>61</b>	<b>£10 m</b>	<b>123</b>
Induced	£2 m	24	£2 m	24	£4 m	48
<b>Total (with Induced)</b>	<b>£7 m</b>	<b>85</b>	<b>£7 m</b>	<b>85</b>	<b>£14 m</b>	<b>171</b>

Note: totals may not sum due to rounding.

2.7.3.15 For the Proposed Development, as shown in Table 2-151, Table 2-152 and Table 2-153, it was estimated that the decommissioning total economic impact of the Proposed Development (Caledonia North and OnTI, Caledonia South and OnTI) would be £20 million GVA and 239 years of employment in North Scotland, £27 million GVA and 328 years of employment in Scotland, and £41 million GVA and 499 years of employment in the UK.

2.7.3.16 As shown in Table 2-151, Table 2-152 and Table 2-153, it was estimated that the decommissioning total economic impact of the Proposed Development would be £40 million GVA and 479 years of employment in Aberdeenshire, £54 million GVA and 656 years of employment in Scotland, and £83 million GVA and 999 years of employment in the UK.

Table 2-151: Total Proposed Development Decommissioning Impact, North Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£16 m	182	£16 m	182	£31 m	364
Indirect	£2 m	30	£2 m	30	£5 m	161
<b>Total</b>	<b>£18 m</b>	<b>212</b>	<b>£18 m</b>	<b>212</b>	<b>£36 m</b>	<b>424</b>
Induced	£2 m	27	£2 m	27	£5 m	54
<b>Total (with Induced)</b>	<b>£20 m</b>	<b>239</b>	<b>£20 m</b>	<b>239</b>	<b>£40 m</b>	<b>479</b>

Note: totals may not sum due to rounding.

Table 2-152: Total Proposed Development Decommissioning Impact, Scotland.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£16 m	182	£16 m	182	£31 m	364
Indirect	£7 m	92	£7 m	92	£14 m	183
<b>Total</b>	<b>22 m</b>	<b>274</b>	<b>22 m</b>	<b>274</b>	<b>£45 m</b>	<b>548</b>
Induced	£5 m	54	£5 m	54	£9 m	109
<b>Total (with Induced)</b>	<b>£27 m</b>	<b>328</b>	<b>£27 m</b>	<b>328</b>	<b>£54 m</b>	<b>656</b>

Note: totals may not sum due to rounding.

Table 2-153: Total Proposed Development Decommissioning Impact, UK.

Parameters	Caledonia North and OnTI		Caledonia South and OnTI		Proposed Development	
	GVA	Years of Employment	GVA	Years of Employment	GVA	Years of Employment
Direct	£16 m	182	£16 m	182	£31 m	364
Indirect	£14 m	177	£14 m	177	£28 m	355
<b>Total</b>	<b>29 m</b>	<b>358</b>	<b>29 m</b>	<b>358</b>	<b>£59 m</b>	<b>717</b>
Induced	£12 m	141	£12 m	141	£24 m	282
<b>Total (with Induced)</b>	<b>£41 m</b>	<b>499</b>	<b>£41 m</b>	<b>499</b>	<b>£83 m</b>	<b>999</b>

Note: totals may not sum due to rounding.

2.7.3.17 The magnitude of impacts during the decommissioning phase for the Proposed Development (Offshore) for each study area are presented in Table 2-154, Table 2-155 and Table 2-156.

Table 2-154: Magnitude – Proposed Development (Offshore) Impact, North Scotland.

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	176	176	352
% of Construction Sector Employment in Study Area	0.9%	0.9%	1.8%
<b>Magnitude of Impact</b>	<b>Medium</b>	<b>Medium</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-155: Magnitude – Proposed Development (Offshore) Impact, Scotland.

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	227	227	454
% of Construction Sector Employment in Study Area	0.1%	0.1%	0.3%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Low</b>

Note: totals may not sum due to rounding.

Table 2-156: Magnitude – Proposed Development (Offshore) Impact, UK.

Parameters	Caledonia North	Caledonia South	Proposed Development (Offshore)
Employment	297	297	594
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

2.7.3.18 The magnitude of impacts during the decommissioning phase for the Proposed Development (Onshore) for each study area are presented in Table 2-157, Table 2-158 and Table 2-159.

Table 2-157: Magnitude – Proposed Development (Onshore) Impact, Aberdeenshire.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	36	36	73
% of Construction Sector Employment in Study Area	0.1%	0.1%	0.2%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Low</b>

Note: totals may not sum due to rounding.

Table 2-158: Magnitude - Proposed Development (Onshore) Impact, Scotland.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	47	47	94
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.1%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

Table 2-159: Magnitude - Proposed Development (Onshore) Impact, UK.

	OnTI Phase 1	OnTI Phase 2	Proposed Development (Onshore)
Employment	61	61	123
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.0%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

2.7.3.19 The magnitude of impacts during the decommissioning phase for the Proposed Development for each study area are presented in Table 2-160, Table 2-161 and Table 2-162.

Table 2-160: Magnitude – Proposed Development Impact, North Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	212	212	424
% of Construction Sector Employment in Study Area	1.1%	1.1%	2.2%
<b>Magnitude of Impact</b>	<b>High</b>	<b>High</b>	<b>High</b>

Note: totals may not sum due to rounding.

Table 2-161: Magnitude – Proposed Development Impact, Scotland.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	274	274	548
% of Construction Sector Employment in Study Area	0.2%	0.2%	0.4%
<b>Magnitude of Impact</b>	<b>Low</b>	<b>Low</b>	<b>Low</b>

Note: totals may not sum due to rounding.

Table 2-162: Magnitude – Proposed Development Impact, UK.

	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
Employment	358	358	717
% of Construction Sector Employment in Study Area	0.0%	0.0%	0.1%
<b>Magnitude of Impact</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>

Note: totals may not sum due to rounding.

**Sensitivity of Receptor**

- 2.7.3.20 The sensitivity of an economy is based on its responsiveness to change, its relative diversity (more diverse economies are less sensitive) and growth trajectory (for example is the number of jobs increasing or decreasing).
- 2.7.3.21 The Aberdeenshire economy employs 112,850 people, and therefore has been assessed as medium sensitivity.
- 2.7.3.22 Given the size of the North Scotland economy, employs 439,600 people, it has been assessed as low sensitivity.
- 2.7.3.23 Given the size and diversity of the Scottish economy, which employs 2.6 million people, it has been assessed as low sensitivity.
- 2.7.3.24 Similarly, the UK economy, which employs 32.2 million people, has been assessed as being of negligible sensitivity.

**Significance of Effect**

- 2.7.3.25 The significance of the decommissioning impacts for the Proposed Development (Offshore) for each study area are presented in Table 2-163, Table 2-164 and Table 2-165.

Table 2-163: Significance of Decommissioning Economic Impacts – Proposed Development (Offshore), North Scotland.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	Medium	Medium	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-164: Significance of Decommissioning Economic Impacts – Proposed Development (Offshore), Scotland.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	Negligible	Negligible	Low
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-165: Significance of Decommissioning Economic Impacts – Proposed Development (Offshore), UK.

	<b>Caledonia North</b>	<b>Caledonia South</b>	<b>Proposed Development (Offshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.3.26 The significance of the decommissioning impacts for the Proposed Development (Onshore) for each study area are presented in Table 2-166, Table 2-167 and Table 2-168.

Table 2-166: Significance of Decommissioning Economic Impacts – Proposed Development (Onshore), Aberdeenshire.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Low
Sensitivity	Medium	Medium	Medium
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-167: Significance of Decommissioning Economic Impacts – Proposed Development (Onshore), Scotland.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-168: Significance of Decommissioning Economic Impacts – Proposed Development (Onshore), UK.

	<b>OnTI Phase 1</b>	<b>OnTI Phase 2</b>	<b>Proposed Development (Onshore)</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

2.7.3.27 The significance of the decommissioning impacts for the Proposed Development for each study area are presented in Table 2-169, Table 2-170 and Table 2-171.

Table 2-169: Significance of Decommissioning Economic Impacts – Proposed Development, North Scotland.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	High	High	High
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Minor</b>	<b>Minor</b>	<b>Minor</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-170: Significance of Decommissioning Economic Impacts – Proposed Development, Scotland.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Low	Low	Low
Sensitivity	Low	Low	Low
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

Table 2-171: Significance of Decommissioning Economic Impacts – Proposed Development, UK.

	<b>Caledonia North and OnTI</b>	<b>Caledonia South and OnTI</b>	<b>Proposed Development</b>
Magnitude of Impact	Negligible	Negligible	Negligible
Sensitivity	Negligible	Negligible	Negligible
<b>Significance</b>	<b>Negligible</b>	<b>Negligible</b>	<b>Negligible</b>
<b>Significance (EIA Terms)</b>	<b>Not Significant</b>	<b>Not Significant</b>	<b>Not Significant</b>

## Tourism and Recreation Impacts

2.7.3.28 The assessment considers whether the decommissioning of the Proposed Development would affect any of the tourism attractions identified in Section 2.4.4, accounting for any significant effects identified in other chapters.

2.7.3.29 The following chapters have been reviewed to assess effects arising from onshore infrastructure:

- Volume 5, Chapter 5: Terrestrial Archaeology and Cultural Heritage;
- Volume 5, Chapter 2: Land Use;
- Volume 5, Chapter 8: Airborne Noise and Vibration;
- Volume 5, Chapter 9: Traffic and Transport; and
- Volume 5, Chapter 4: Landscape and Visual Assessment.

2.7.3.30 The following chapters have been reviewed to assess effects arising from offshore infrastructure:

- Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation; and
- Volume 2, Chapter 12: Seascape, Landscape and Visual Impact Assessment.

### Onshore

2.7.3.31 As shown in Table 2-172 where no significant effects have been identified, this is indicated with an X. Where a potential significant effect has been identified, this is indicated with a ✓.



Table 2-172: Significant Effects Identified on Tourism and Recreation Assets – Onshore.

Attraction	Airborne Noise	Shipping and Navigation	Infrastructure and Other Users	LVIA	Archaeology and Cultural Heritage	Traffic and Transport
North East Shooting Breaks	X	X	X	X	X	X
The Boyndie Visitor Centre	X	X	X	X	X	X
Inchdrewer Castle	X	X	X	X	X	X
Eden Castle	X	X	X	X	X	X
Boyne Castle	X	X	X	X	X	X
Delgatie Castle	X	X	X	X	X	X
Banff Harbour Marina	X	X	X	X	X	X
Banff Castle	X	X	X	X	X	X
Duff House	X	X	X	X	X	X
Duff House Royal Golf Club	X	X	X	X	X	X
Museum of Banff	X	X	X	X	X	X
St Mary’s Parish Church	X	X	X	X	X	X
Turriff Golf Club	X	X	X	X	X	X
Macduff Marine Aquarium	X	X	X	X	X	X
New Deer Showground	X	X	X	X	X	X
Suds Surf School	X	X	X	X	X	X
Sandend Beach	X	X	X	X	X	X
Haddo House	X	X	X	X	X	X
Fyvie Castle	X	X	X	X	X	X
Bennachie Forest	X	X	X	X	X	X
Castle Fraser	X	X	X	X	X	X
Crathes Castle	X	X	X	X	X	X

2.7.3.32 No potential significant effects have been identified in the other chapters, which affect the tourism attractions identified in Section 2.4.4.

### *Significance of Effect*

2.7.3.33 No significant effects on tourism assets have been identified in other topic chapters of the EIAR. Therefore, no tourism assets have been assessed as part of the socio-economic, tourism and recreation assessment and no significant effects have identified.

### **Offshore**

2.7.3.34 As discussed in Volume 2, Chapter 12: Seascape, Landscape and Visual Impact Assessment there are expected to be significant visual impacts in Caithness and Aberdeenshire.

2.7.3.35 In Caithness, moderate significant visual impacts were identified at the Viewpoint 4: Keiss, Viewpoint 5: Wick (path south of South View), Viewpoint 6: Sarclet and Viewpoint 8: Whaligoe Steps. This is due to the appearance of WTGs and OSPs, as well as the large numbers of cranes and vessels.

2.7.3.36 On this basis, it was concluded that a 27km section of coast between Whaligoe and Keiss is expected to experience moderate significant visual impact effect, with a further 17km section between Wick and Hill of Harley experiencing significant cumulative effects. These effects were associated with Caledonia North.

2.7.3.37 In Aberdeenshire, moderate (borderline) significant visual impacts were identified at Viewpoint 17: Portsoy, Viewpoint 18: MacDuff and Viewpoint 19: Gardenstown. This is due to the appearance of WTGs and OSPs, as well as the large numbers of cranes and vessels.

2.7.3.38 On this basis, a 17km section of coast between Portsoy and Gardenstown is expected to experience moderate (borderline) significant visual impact effects. These effects were associated with Caledonia South.

### *Magnitude of Impact*

2.7.3.39 As identified in the baseline assessment (Section 2.4), none of the main regional attractions in Caithness are located within the section of coast between Keiss and Whaligoe Steps. Visitors within the Caithness TRSA who are on the North Coast 500 coastal route are in the area due to the various attractions along the route, and therefore their behaviour is not expected to change. Therefore, the impact has been assessed as negligible.

2.7.3.40 For some of the local attractions (Wick Heritage Museum and Pulteney Distillery) views of the sea are not considered to be key features, and therefore they would not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible.

2.7.3.41 For Keiss Castle and Castle Sinclair, both of which are ruined castles located on the coastline, the predominant features are their historical significance and their dramatic position on the coast. While the visual impact may have some affect, it is not expected to substantially alter visitor behaviour. Therefore, the effect has been assessed as low.

- 2.7.3.42 At Whaligoe Steps the key features are the history of the attraction, which was previously used by fishers bringing the catch ashore, and the dramatic nature of the steps cut into the cliff. Views towards the sea are appreciated when visitors are in the harbour itself, as well as the view of the stacks and cliffs.
- 2.7.3.43 Though there is potential for the visual impact to affect visitor behaviour, given the appearance of existing WTGs from Beatrice OWF and Moray East OWF and the key features of the attraction, it is not expected that the additional turbines will substantially reduce the number of visitors. As a result, the impact has been assessed as low.
- 2.7.3.44 For Banff Harbour Marina, the key feature for visitors is the ability to go out to sea in one of the pleasure craft. This is not expected to be affected by the visual impact and therefore the effect has been assessed as negligible.
- 2.7.3.45 The main attraction of Banff Castle is its historical significance, which will not be affected by the Proposed Development. Therefore, the impact has been assessed as negligible. Similarly, the key feature of MacDuff Marine Aquarium is the visible sea life, which is not expected to be affected by the Proposed Development. Therefore, the effect has been assessed as negligible.
- 2.7.3.46 The magnitude of impact associated with each attractions is presented in Table 2-173 below.

Table 2-173: Magnitude of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Negligible	Low
Castle Sinclair	Low	Negligible	Low
Whaligoe Steps	Low	Negligible	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Sensitivity*

2.7.3.47 In Caithness, the North Coast 500 is considered to be resistant to changes associated with visual impact because there are a variety of attractions along the route that attract people. Therefore the sensitivity has been assessed as negligible. Similarly, Wick Heritage Museum, Pulteney Distillery, Banff Harbour Marina, Banff Castle and MacDuff Marine Aquarium are considered to have negligible sensitivity, because views towards the sea are not considered to be a key part of their attraction.

2.7.3.48 Given their position on the coast and settings, Keiss Castle, Castle Sinclair and Whaligoe Steps may be affected by visual impacts, though there are a range of other factors (e.g., history) that are important in their attractiveness to visitors. Therefore, they are considered to have low sensitivity.

2.7.3.49 The sensitivity of each attraction is presented in Table 2-174 below.

Table 2-174: Sensitivity of Tourism Attraction Impacts – Offshore.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Low	Low	Low
Castle Sinclair	Low	Low	Low
Whaligoe Steps	Low	Low	Low
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

*Significance of Effect*

2.7.3.50 Based on the assessment of the sensitivity and magnitude, the significance effect on the tourism assets of the Proposed Development has been outlined in Table 2-175.

Table 2-175: Significance of Tourism Attraction Impacts – Offshore Decommissioning.

Attraction	Caledonia North and OnTI	Caledonia South and OnTI	Proposed Development
North Coast 500	Negligible	Negligible	Negligible
Wick Heritage Museum	Negligible	Negligible	Negligible
Pulteney Distillery	Negligible	Negligible	Negligible
Keiss Castle	Negligible	Negligible	Negligible
Castle Sinclair	Negligible	Negligible	Negligible
Whaligoe Steps	Negligible	Negligible	Negligible
Banff Harbour Marina	Negligible	Negligible	Negligible
Banff Castle	Negligible	Negligible	Negligible
MacDuff Marine Aquarium	Negligible	Negligible	Negligible

## 2.8 Cumulative Effects

### 2.8.1 Overview

2.8.1.1 The list of relevant developments for inclusion within the CIA is outlined in Volume 7A, Appendix 7-1: Cumulative Impact Assessment Methodology. Developments which are located within the study area have the potential to result in a cumulative effect on socio-economics, tourism and recreation. Developments which are either operational or in the decommissioning stage are considered to be part of the baseline and are not considered within the assessment.

2.8.1.2 A tiered approach to the CIA is therefore applied here, allowing weighted assessment of cumulative effects.

#### Tier 1:

2.8.1.3 Tier 1 projects include all operational and under construction projects as well as permitted applications that have not yet been implemented and submitted applications that have not yet been determined.

#### Tier 2:

2.8.1.4 All plans/projects assessed under Tier 1, plus those plans/projects which have become operational since the baseline characterisation of the

Proposed Development, plus those in construction, those with consent, and those pending determination following a submitted application.

**Tier 3:**

2.8.1.5 All plans/projects assessed under Tier 2, plus those projects that have submitted a Scoping Report.

**Tier 4:**

2.8.1.6 All plans/projects assessed under Tier 3 which projects considered reasonably foreseeable, plus those with a granted Agreement for Lease (AfL) where information is available to inform the cumulative assessment and there is sufficient data confidence.

2.8.1.7 This CIA for socio-economics, tourism and recreation will consider the worst-case-design scenario for each of the projects, plans and activities in line with the methodology outlined in Volume 1, Chapter 7: EIA Methodology.

2.8.1.8 The main cumulative effects related to socio-economics, tourism and recreation are expected to relate to the supply chain, as this is shared across the whole offshore wind sector. As a result, offshore wind developments elsewhere in Scotland or the UK have the potential to cumulatively affect the Proposed Development. As a result, OWFs that meet the criteria for the different tiers have been considered at an aggregate level.

2.8.1.9 The offshore wind supply chain is dynamic, which means that it is expected to develop significantly in response to industry demand, government investment and increased coordination across the sector. As a result, the cumulative impacts will be dependent on the interplay of a broad range of factors and therefore any assessment must be at a high level.

Table 2-176: Other Plans/Projects included in the Socio-Economics, Tourism, and Recreation CIA.

Plan/Project	Summary	Status	Distance from Proposed Development (km)	Distance from ECC (km)	Construction Dates (if relevant)	Operational by (if relevant)	Summary of Interaction with Proposed Development
<b>Tier 2 - Operational Offshore Wind Projects</b>							
Scotland	10 offshore wind farms	Operational	N/A	N/A	N/A	2024 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
England and Wales	25 offshore wind farms	Operational	N/A	N/A	N/A	2024 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
<b>Tier 2 - Under Construction Offshore Wind Projects</b>							
Scotland	3 offshore wind farms	Under Construction	N/A	N/A	2024-2025	2025 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
England and Wales	1 offshore wind farms	Under Construction	N/A	N/A	2024-2025	2025 onwards	O&M phase interacts with construction and O&M phase of Proposed Development

Plan/Project	Summary	Status	Distance from Proposed Development (km)	Distance from ECC (km)	Construction Dates (if relevant)	Operational by (if relevant)	Summary of Interaction with Proposed Development
<b>Tier 2 - Consented Offshore Wind Projects</b>							
Scotland	3 offshore wind farms	Consented	N/A	N/A	2024-2028	2029 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
England and Wales	4 offshore wind farms	Consented	N/A	N/A	2024-2028	2029 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
<b>Tier 2 - In Development Offshore Wind Farms</b>							
Scotland	3 offshore wind farms	In Development	N/A	N/A	2025-2029	2028 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
England and Wales	2 offshore wind farms	In Development	N/A	N/A	2025-2029	2029 onwards	O&M phase interacts with construction and O&M phase of Proposed Development
Republic of Ireland	5 offshore wind farms	In Development	N/A	N/A	2025-2028	2027 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development



Plan/Project	Summary	Status	Distance from Proposed Development (km)	Distance from ECC (km)	Construction Dates (if relevant)	Operational by (if relevant)	Summary of Interaction with Proposed Development
<b>Tier 3 - In Development Offshore Wind Farms</b>							
Scotland	14 offshore wind farms	In Development	N/A	N/A	2026-2032	2030 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
England and Wales	9 offshore wind farms	In Development	N/A	N/A	2026-2030	2028 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
Northern Ireland	1 offshore wind farms	In Development	N/A	N/A	2028-2030	2031 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
Republic of Ireland	3 offshore wind farms	In Development	N/A	N/A	2025-2030	2031 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development

Plan/Project	Summary	Status	Distance from Proposed Development (km)	Distance from ECC (km)	Construction Dates (if relevant)	Operational by (if relevant)	Summary of Interaction with Proposed Development
<b>Tier 4 - In Development Offshore Wind Farms</b>							
Scotland	14 offshore wind farms	In Development	N/A	N/A	2026-2034	2030 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
England and Wales	1 offshore wind farms	In Development	N/A	N/A	2030-2031	2032 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development
Northern Ireland	1 offshore wind farms	In Development	N/A	N/A	2030-2031	2032 onwards	O&M and construction phase interacts with construction and O&M phase of Proposed Development

## 2.8.2 Construction

2.8.2.1 An assessment of the likely significance of the cumulative effects of the Proposed Development on socio-economic study areas, arising from each of identified impact is given below.

### Economic Impacts

#### Increased Offshore Wind Supply Chain in Scotland and Rest of UK

Tier 2-4

2.8.2.2 There are a number of offshore wind developments that are being developed across the UK, particularly on the east coast of Scotland (e.g. ScotWind). There is potential for this to create a critical mass of opportunities that attract manufacturers and other industry.

#### *Sensitivity of Receptor*

2.8.2.3 As for the assessment of the Proposed Development the sensitivity of the Aberdeenshire economy has been assessed as medium, the sensitivity of the Scottish economy has been assessed as low and the sensitivity of the UK economy has been assessed as negligible.

#### *Magnitude of Cumulative Impact*

2.8.2.4 As discussed in Section 2.2, offshore wind has substantial potential to generate economic impacts in Scotland and the UK. For example, the critical mass created by the high number of offshore wind developments may attract multinational companies who manufacture critical components such as blades and cables, increasing economic impact in Scotland and the UK.

2.8.2.5 The Proposed Development is expected to account for around 2GW of offshore wind capacity and to be one of the earlier ScotWind projects to be developed. As a result, it could play a role in providing investors confidence about the scale of the opportunity in Scotland, generating more substantial economic impacts on Scotland and the UK.

2.8.2.6 The most adverse scenario has been considered based on already committed investments, though further investments are likely as the supply chain develops. These projects require certainty that projects will be developed and orders will be forthcoming, which is why early stage projects such as the Proposed Development are important in securing the investment.

2.8.2.7 This includes a factory proposed by Sumitomo, a Japanese multinational, to manufacture subsea cables in Highland which is expected to directly employ over 150 people, and a factory proposed by XLCC to manufacture subsea cables in Ayrshire, which is expected to employ 900 people. These factories would employ the equivalent of 0.6% of manufacturing

employment in Scotland and less than 0.1% of manufacturing employment in the UK.

2.8.2.8 On this basis the magnitude of impact in Scotland has been assessed as medium and magnitude of impact in the UK has been assessed as negligible. More local impacts are likely to have a higher magnitude of impact. However, this cannot be assessed since the local area that will be relevant for each of the projects are not known.

2.8.2.9 Similarly, the increased activity related to offshore wind developments in Aberdeenshire (e.g. laying cables, building substations) may lead to increased specialisation in the area, supporting a larger economic impact. The size of any potential impact will depend on how the supply chain responds, and therefore it is not possible to assess the magnitude of economic impact.

#### *Significance of Cumulative Effect*

2.8.2.10 Overall, the magnitude of impact in Scotland has been assessed as medium and sensitivity of the economy is considered to be low. Given that the magnitude is at the lower end of the range (0.5-1.0%), the effect has been assessed as minor beneficial, which is not significant in EIA terms.

2.8.2.11 Overall, the magnitude of impact in the UK has been assessed as negligible and sensitivity of the economy is considered to be negligible. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.

#### **Increased Competition for Resources**

Tier 2-4

2.8.2.12 The large number of offshore wind farms will require similar resources, leading to increased competition.

#### *Sensitivity of Receptor*

2.8.2.13 As for the assessment of the Proposed Development the sensitivity of the Aberdeenshire economy has been assessed as medium, the sensitivity of the Scottish economy has been assessed as low and the sensitivity of the UK economy has been assessed as negligible.

#### *Magnitude of Cumulative Impact*

2.8.2.14 Due to the size of the planned offshore wind expansion, including ScotWind, some resources such as ports, manufacturing facilities and skilled workers are likely to be in high demand.

2.8.2.15 Without co-ordination between developers and suppliers, competitive pressure on resources may lead to delays to less developed projects and a slower build out of offshore wind capacity. However, it is also likely to lead to increased investment in the sector in order to meet the demand for services. For example, it may lead to new port capacity and manufacturing facilities, or increased efficiency in the sector.

- 2.8.2.16 Under the most adverse scenario, it is anticipated that there will be a slower build out of offshore wind, though the total activity is expected to be the same. It is also anticipated that the demand for ports and other services will lead to increased investment and government response to increase supply, which will lead to a faster build out.
- 2.8.2.17 Therefore, the magnitude of impact has been assessed as negligible for the Scottish and UK economies. To assess local impacts would require knowledge of the construction port(s), which is not known at this stage and therefore the magnitude cannot be assessed at a local scale.
- 2.8.2.18 As with the offshore development, there may be increased demand for certain types of workers related to the onshore development, including construction workers. This increased competition may lead to a slower build out of onshore infrastructure or a higher share of workers from elsewhere. Overall, this impact has been assessed as negligible.

*Significance of Cumulative Effect*

- 2.8.2.19 Overall, the magnitude of impact in Scotland has been assessed as negligible and sensitivity of the economy is considered to be low. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.
- 2.8.2.20 Overall, the magnitude of impact in the UK has been assessed as negligible and sensitivity of the economy is considered to be negligible. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.

**Social Impacts**

Tier 2-4

- 2.8.2.21 There are a number of developments on the east coast of Scotland, which may use similar ports and skilled labour.

**Magnitude of Cumulative Impact**

- 2.8.2.22 Construction impacts related to single projects, such as the Proposed Development, are likely to be short-term. However, given the other ScotWind projects that are under development it is likely that when taken together, these impacts are likely to be experienced as long-term and relatively stable.
- 2.8.2.23 As discussed in Section 2.7, the Proposed Development is likely to result in changes to demographics, higher demand for housing and other services. However, if this is one of several projects that are developed over a number of years, skilled workers and their families are likely to settle in the areas around ports and other facilities permanently. This is expected to result in a sustained population increase and demand for services, such as education and health, and a greater level of integration.

2.8.2.24 These impacts are likely to be modulated by characteristics of individual communities, such as capacity and population dynamics. Therefore, it is not possible to assess the potential magnitude of impact.

#### **Significance of Cumulative Effect**

2.8.2.25 It is not possible to determine the magnitude of the adverse or beneficial impact and therefore it is not possible to assess the significance of the effect.

#### **Secondary Mitigation and Residual Cumulative Effects**

2.8.2.26 No additional socio-economics mitigation has been identified.

### **2.8.3 Operation**

2.8.3.1 An assessment of the likely significance of the cumulative effects of the Proposed Development on socio-economic study areas, arising from each of identified impact is given below.

## **Economic Impacts**

### **Increased Offshore Wind Supply Chain in Scotland and Rest of UK**

Tier 2-4

#### *Sensitivity of Receptor*

2.8.3.2 As for the assessment of the Proposed Development the sensitivity of the Aberdeenshire economy has been assessed as medium, the sensitivity of the Scottish economy has been assessed as low and the sensitivity of the UK economy has been assessed as negligible.

#### *Magnitude of Cumulative Impact*

2.8.3.3 The size of the offshore wind sector may lead to economies of scale and the development of operations and maintenance hubs on the east coast. As the operation and maintenance port is not known, it is not possible to assess the magnitude of impact.

2.8.3.4 Given the small number of jobs supported by the activity related to onshore infrastructure in Aberdeenshire, the cumulative impacts are expected to be negligible.

#### *Significance of Cumulative Effect*

2.8.3.5 It is not possible to determine the magnitude of the adverse or beneficial impacts on the Scottish economy and therefore it is not possible to assess the significance of the effect.

2.8.3.6 Overall, the magnitude of the impact in Aberdeenshire has been assessed as negligible and the sensitivity of the economy has been assessed as medium. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms

- 2.8.3.7 Overall, the magnitude of the impact in Aberdeenshire has been assessed as negligible and the sensitivity of the economy has been assessed as medium. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.

### **Increased Competition for Resources**

#### Tier 2-4

##### *Sensitivity of Receptor*

- 2.8.3.8 As for the assessment of the Proposed Development the sensitivity of the Aberdeenshire economy has been assessed as medium, the sensitivity of the Scottish economy has been assessed as low and the sensitivity of the UK economy has been assessed as negligible.

##### *Magnitude of Cumulative Impact*

- 2.8.3.9 The large number of offshore wind farms may also lead to competition for resources, such as access to ports. As with the construction sector this is expected to result in increased investment and efficiency, and improved co-ordination across the sector.
- 2.8.3.10 Therefore, there is not expected to be a reduction in the build out of offshore wind farms and the magnitude of impact has been assessed as negligible for the Scottish and UK economies. To assess local impacts would require knowledge of the operation and maintenance port(s), which is not known at this stage and therefore the magnitude cannot be assessed at a local scale.
- 2.8.3.11 Given the small scale of employment required to operate the onshore infrastructure, the cumulative impact associated with increased competition for resources is expected to be negligible.

##### *Significance of Cumulative Effect*

- 2.8.3.12 Overall, the magnitude of impact in Scotland has been assessed as negligible and sensitivity of the economy is considered to be low. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.
- 2.8.3.13 Overall, the magnitude of impact in the UK has been assessed as negligible and sensitivity of the economy is considered to be negligible. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.
- 2.8.3.14 Overall, the magnitude of the impact in Aberdeenshire has been assessed as negligible and the sensitivity of the economy has been assessed as medium. The effect has therefore been assessed as negligible beneficial, which is not significant in EIA terms.

## Social Impacts

Tier 2-4

### Magnitude of Cumulative Impact

2.8.3.15 A number of offshore wind farm developments on the east coast of Scotland will generate impacts related to operations and maintenance, creating long-term jobs. This may lead developers to co-ordinate their actions, developing operations and maintenance hubs that will have greater demographic and other impacts.

### Significance of Cumulative Effect

2.8.3.16 It is not possible to determine the magnitude of the adverse or beneficial impact and therefore it is not possible to assess the significance of the effect.

### Secondary Mitigation and Residual Cumulative Effects

2.8.3.17 No additional socio-economics mitigation has been identified.

## 2.9 In-combination Effects

2.9.1.1 In-combination impacts may occur through the inter-relationship with another EIAR topic that may lead to different or greater environmental effects than in isolation.

2.9.1.2 There is also the potential for in-combination impacts resulting from onshore and offshore works. These are identified within Volume 6, Chapter 5: Intertidal Assessment and are therefore not repeated here.

2.9.1.3 The potential in-combination effects for socio-economics, tourism and recreation receptors resulting from effects between onshore and offshore Proposed Development works are described below.

### 2.9.2 In-Combination effects between onshore Proposed Development works

2.9.2.1 In-combination effects may occur due to multiple impacts on a receptor or a group of receptors from the Proposed Development. This includes the following:

- Project Lifecycle Effects - Interactions between impacts across different phases of the Proposed Development i.e., interaction of impacts across construction, operation and maintenance and decommissioning; and
- Inter-related Receptor Effects - Interactions between impacts on a receptor or group of receptors within an offshore Project stage (Inter-related Receptor Effects).



## 2.9.3 In-Combination effects between offshore Proposed Development works

- 2.9.3.1 There is the potential for in-combination effects to occur upon offshore receptors which have been detailed within the following chapters:
- Fishing Fleets (Volumes 2, 3 and 4, Chapter 8: Commercial Fisheries);
  - Lifeline ferry service between Orkney, Shetland and Aberdeen (Volumes 2, 3 and 4, Chapter 9: Shipping and Navigation); and
  - Oil and Gas Infrastructure (Volumes 2, 3 and 4, Chapter 13: Other Human Activities).
- 2.9.3.2 These chapters include details on the relevant mitigation (embedded and/or secondary).
- 2.9.3.3 It is noted that the assessment of Shipping and Navigation receptors identified potential impacts on the lifeline ferry service between Orkney, Shetland and Aberdeen. These potential effects have been mitigated through the implementation of a Structure Exclusion Zone as part of Caledonia South to manage impacts on adverse weather routing. Therefore, there are no secondary economic impacts on either Gross Value Added or employment as a result.

## 2.10 Transboundary Effects

- 2.10.1.1 The assessment has considered the economic impact in Aberdeenshire, North Scotland, Scotland, and the UK, as well as the potential economic impacts associated with the construction, operation and maintenance and decommissioning phases for the Proposed Development. However, a significant proportion of expenditure is also expected to take place in the EU and elsewhere in the world, which will generate beneficial economic impacts.
- ### 2.10.2 Construction
- 2.10.2.1 The Developer has provided estimates of expenditure in Scotland (£1,406 million) and rest of UK (£1,705 million). In addition, there are expected to be billions of pounds worth of contracts located outside of the UK, including in Europe, in contract areas such as turbine manufacturing.
- 2.10.2.2 These contracts will generate economic activity and support employment in the EU and the rest of the world. It is not possible to assess the economic impacts generated, but these are expected to be positive impacts in nature. In addition, given the scale of the EU and global economies, it is therefore considered likely that, at most, there will be a negligible beneficial transboundary effect.

## **2.10.3 Operations**

2.10.3.1 In addition to an annual expenditure of £211.5 million in Scotland and £24.5 million in rest of UK, there is expected to be an expenditure in the EU and elsewhere in the world. This is expected to lead to beneficial socio-economic effects, generating economic activity and supporting employment in the EU and elsewhere. Given the scale of the EU and global economies, it is considered likely that there will be a negligible beneficial effect.

## **2.10.4 Decommissioning**

2.10.4.1 In addition to decommissioning expenditure of £142 million in Scotland and the UK, there is expected to be an additional expenditure in the EU and elsewhere in the world. This is expected to lead to beneficial socio-economic effects, generating economic activity and supporting employment in the EU and elsewhere. Given the scale of the EU and global economies, it is considered likely that there will be a negligible beneficial effect.

## **2.11 Mitigation Measures and Monitoring**

2.11.1.1 No additional socio-economics mitigation is considered necessary because the likely effect in the absence of further mitigation (beyond the commitments outlined in Section 2.5.8, e.g. SCDS spending commitments) is not significant (adversely) in EIA terms.

## **2.12 Residual Effects**

### **2.12.1 Construction Effects**

2.12.1.1 Given that no additional socio-economics mitigation is considered necessary, the residual effects from the economic impact of the construction of the Proposed Development are the same as those outlined in Section 2.7.

### **2.12.2 Operation Effects**

2.12.2.1 Given that no additional socio-economics mitigation is considered necessary, the residual effects from the economic impact of the operation of the Proposed Development are the same as those outlined in Section 2.7.

## 2.12.3 Decommissioning Effects

2.12.3.1 Given that no additional socio-economics mitigation is considered necessary, the residual effects from the economic impact of the decommissioning of the Proposed Development are the same as those outlined in Section 2.7.

## 2.13 Summary of Effects

2.13.1.1 Table 2-177 to Table 2-194 present a summary of the significant effects assessed within this EIAR in relation to socio-economics, tourism and recreation, any mitigation required, and the residual effects are provided.

Table 2-177: Summary of Effects – Caledonia North / Caledonia South (Offshore) (North Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Medium	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Note, it is not possible to assess social impacts as the ports are not known.

Table 2-178: Summary of Effects – Caledonia North / Caledonia South (Offshore) (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Medium	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Note, it is not possible to assess social impacts as the ports are not known.

Table 2-179: Summary of Effects – Caledonia North / Caledonia South (Offshore) (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Low	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-180: Summary of Effects – OnTI Phase 1 / OnTI Phase 2 (Aberdeenshire).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Medium	Negligible	None	Not Significant
Social Impact	Low	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Medium	Negligible	None	Not Significant
Social Impact	Negligible	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Medium	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-181: Summary of Effects – OnTI Phase 1 / OnTI Phase 2 (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant



Table 2-182: Summary of Effects – OnTI Phase 1 / OnTI Phase 2 (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-183: Summary of Effects – Caledonia North and OnTI / Caledonia South and OnTI (North Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	Low	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Medium	Low	Minor	None	Not Significant
Social Impact	Negligible	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	High	Low	Moderate	None	Not Significant
Social Impact	High	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-184: Summary of Effects – Caledonia North and OnTI / Caledonia South and OnTI (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Low	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-185: Summary of Effects – Caledonia North and OnTI / Caledonia South and OnTI (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Low	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-186: Summary of Effects – Proposed Development (Offshore) (North Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-187: Summary of Effects – Proposed Development (Offshore) (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Low	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-188: Summary of Effects – Proposed Development (Offshore) (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Medium	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-189: Summary of Effects – Proposed Development (Onshore) (Aberdeenshire).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Medium	Negligible	None	Not Significant
Social Impact	Low	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Medium	Negligible	None	Not Significant
Social Impact	Negligible	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Low	Medium	Minor	None	Not Significant
Social Impact	High	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant



Table 2-190: Summary of Effects – Proposed Development (Onshore) (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-191: Summary of Effects – Proposed Development (Onshore) (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-192: Summary of Effects – Proposed Development (North Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	Low	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	Negligible	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	High	Negligible	Negligible	None	Not Significant
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-193: Summary of Effects – Proposed Development (Scotland).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	High	Low	Minor	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Low	Low	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

Table 2-194: Summary of Effects – Proposed Development (UK).

Impact	Magnitude	Sensitivity of Receptor	Significance	Mitigation Measures	Residual Effect
<b>Construction</b>					
Economic Impact	Medium	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Operation</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Low	Negligible	Negligible	None	Not Significant
<b>Decommissioning</b>					
Economic Impact	Negligible	Negligible	Negligible	None	Not Significant
Social Impact	-	-	-	-	-
Tourism and Recreation Impact	Negligible	Negligible	Negligible	None	Not Significant

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