



Code: UKCAL-CWF-CON-EIA-RPT-00007-7F01

Volume 7F Intertidal and Combined Assessment Appendices

Appendix 2-1 Socio-economics Technical Report

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Code	UKCAL-CWF-CON-EIA-RPT-00007-7F01
Revision	Issued
Date	18 October 2024

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Acronyms and Abbreviations

EIA	Environmental Impact Assessment
EIAR	Environmental Impact Assessment Report
FTE	Full Time Equivalent
GVA	Gross Value Added
MDS	Maximum Design Scenario
SCDS	Supply Chain Development Statement
TNUoS	Transmission Network Use of System
UK	United Kingdom
WTG	Wind Turbine Generator

1 Introduction

1.1.1.1 The Caledonia Offshore Wind Farm (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). Collectively, the Proposed Development (Offshore) and Proposed Development (Onshore) are referred to as the "Proposed Development". This Socio-economics technical report provides the approach to the economic impact assessment associated with Volume 6, Chapter 2: Socio-economics, Tourism and Recreation of the Environmental Impact Assessment Report (EIAR) for the Proposed Development.

1.2 Phasing

1.2.1.1 Caledonia Offshore Wind Limited (the Applicant) has proposed a potential phased approach to the Proposed Development (Offshore) construction. As described within Volume 1, Chapter 3: Proposed Development Description (Offshore) and Volume 1, Chapter 4: Proposed Development Description (Onshore), the Proposed Development (Offshore) will have up to 140 WTGs, delivered between Caledonia North and Caledonia South. Phasing has been designed to address uncertainties around precise timings of the delivery of Caledonia North and Caledonia South. As a result, there are a range of scenarios for phasing which are covered by the assessment.

1.2.1.2 The Applicant is seeking the flexibility to construct either Caledonia North or Caledonia South in the first phase to deploy the most appropriate Wind Turbine Generator (WTG) turbine technology/foundation type (including the option for floating) thus improving deliverability. The approach to the consenting of the Proposed Development (Onshore) aligns with the phased offshore application strategy, and therefore considers two onshore construction phases to align with the delivery of the Caledonia North and Caledonia South offshore phases. For further information on the Proposed Development phasing refer to Volume 1, Chapter 5: Proposed Development Phasing.

1.2.1.3 The Environmental Impact Assessment (EIA) is based on the consideration of the realistic Worst-Case-Scenario, which involves assessing design parameters for the different elements of the Proposed Development (both onshore and offshore) considered to be a worst case for any given assessment. In the case of the socio-economics, this corresponds to the minimum peak employment among all the scenarios. A gap of up to five years between construction of Phase 1 and Phase 2 is required to be considered within the assessments. This scenario assumption presents the Worst-Case-Scenario with the lowest level of peak employment.

2 Approach

2.1 Baseline Methodology

- 2.1.1.1 The methodology for establishing the baseline involved a broad desktop study. This study was aimed at evaluating and assessing the key datasets and statistics related to socio-economics features and supply chain capabilities in the United Kingdom (UK) and Scotland. It focused on various key statistics, including general population demographics, age group distribution, overall employment levels, and specific employment figures within industries linked to the offshore sector.
- 2.1.1.2 The data sources specific to the socio-economics baseline related to the Proposed Development are shown in Table 2-1.

Table 2-1: Summary of key data sources used.

Data Sources	Summary
Mid-2022 Population Estimates Scotland (National Records of Scotland, 2023 ¹)	Population estimates, broken down by age.
2018-based Principal Population Projections (National Records of Scotland, 2019 ²)	Population projections for Scotland and each of its 32 local authorities, broken down by age.
Principal Population Projections 2018-Based (ONS, 2020 ³)	Population projections for the United Kingdom (UK) as a whole, broken down by age.
Annual Survey of Hours and Earnings 2023 (ONS, 2023 ⁴)	Provides average and median residential and workplace earning.
Business Register and Employment Survey 2022 (ONS, 2023 ⁵)	Provides a breakdown of employment by sector.
Annual Population Survey 2022 (ONS, 2023 ⁶)	Provides statistics on characteristics of populations, including economic activity rate and unemployment rate.
Offshore Wind Skills Intelligence Report 2023 (Offshore Wind Industry Council, 2023 ⁷)	Provides information on the existing offshore wind labour force across the UK as well as the skills that are expected to be needed up to 2030.
The Offshore Wind Operations and Maintenance Opportunity (Offshore Renewable Energy Catapult, 2020 ⁸)	Discusses the potential opportunities in offshore wind by 2030, with a detailed breakdown of annual spending and associated opportunities in the UK.
The Offshore Wind Sector Deal (UK Government, 2020 ⁹)	Sets out the economic opportunities associated with offshore wind, including UK

Data Sources	Summary
	Government targets on the share of UK content.
National Performance Framework (Scottish Government, 2018 ¹⁰)	Sets out a framework for what a successful country would look like, providing a range of measures to assess a proposed project against.
National Strategy for Economic Transformation (Scottish Government, 2022 ¹¹)	Sets out the priorities for the Scottish economy, as well as how to achieve a wellbeing economy.
Offshore Wind Policy Statement (Scottish Government, 2020 ¹²)	Sets out the Scottish Government’s ambitions for the future of offshore wind in Scotland.
GB Day Visitor 2019 (Kantar Taylor Nelson Sofres (TNS), 2020 ¹³)	Annual publication of domestic day visits by number and value for 2019, Earlier data for local authorities will be from 2019 as the latest year not affected by Covid-19.
GB Tourism Survey 2022 (Kantar TNS, 2020 ¹⁴)	Annual publication of domestic overnight tourism visits and nights by number, value and purpose for 2022, Earlier data for local authorities will be from 2019 as the latest year not affected by Covid-19.
International Passenger Survey (ONS, 2023 ¹⁵)	Annual publication of international overnight tourism visits and nights by number, value and purpose for 2022.
Annual Growth Sector Statistics (Scottish Government, 2023 ¹⁶)	Provides economic statistics, such as employment and Gross Value Added (GVA), on growth sectors identified by the Scottish Government, including sustainable tourism.

2.2 Study Areas

2.2.1 Approach

2.2.1.1 While a significant proportion of the activity associated with the Proposed Development is expected to take place offshore, the relevant study areas for the socio-economic assessment are located onshore.

2.2.1.2 The socio-economic study areas for the assessment of effects on employment and economy will be defined in line with the guidance on identification of ‘local areas’ for offshore developments published by the Scottish Government

(Scottish Government, 2022¹⁷). This guidance identified six principles for identifying local study areas for offshore development:

- 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.

2.2.2 Study Areas for Economic Impact Assessment

2.2.2.1

The main local epicentres associated with potential socio-economic impacts are expected to be the ports that will be used for the Proposed Development. However, at this stage these ports are not known, and therefore the following socio-economic study areas have been considered:

- "The Construction Port", which is the area around the expected construction port(s) (construction phase only);
- "The Operation Port", which is the area around the expected operation and maintenance port(s) (operation and maintenance phase only);
- Scotland; and
- The United Kingdom (UK).

3 Economic Impact Methodology

3.1.1.1 There are three broad phases of the Proposed Development that are considered as part of the socio-economic impact assessment:

- Construction;
- Operation and Maintenance; and
- Decommissioning.

3.1.1.2 For each phase there are three types of economic impact, as demonstrated in Figure 3-1.

3.1.1.3 In line with industry best practice, for the assessment of GVA and employment impacts, the analysis focuses on:

- Direct economic impacts: economic impact associated with the activity of primary contractors involved in the development, construction and operations and maintenance of the Proposed Development; and
- Indirect economic impacts: economic impact associated with the spending taking place across the supply chain of those businesses involved in the development, construction and operations and maintenance of the Proposed Development.

3.1.1.4 The assessment also refers to the additional benefits associated with the spending in the economy by those employed to carry out works associated with the Proposed Development (induced economic impacts).

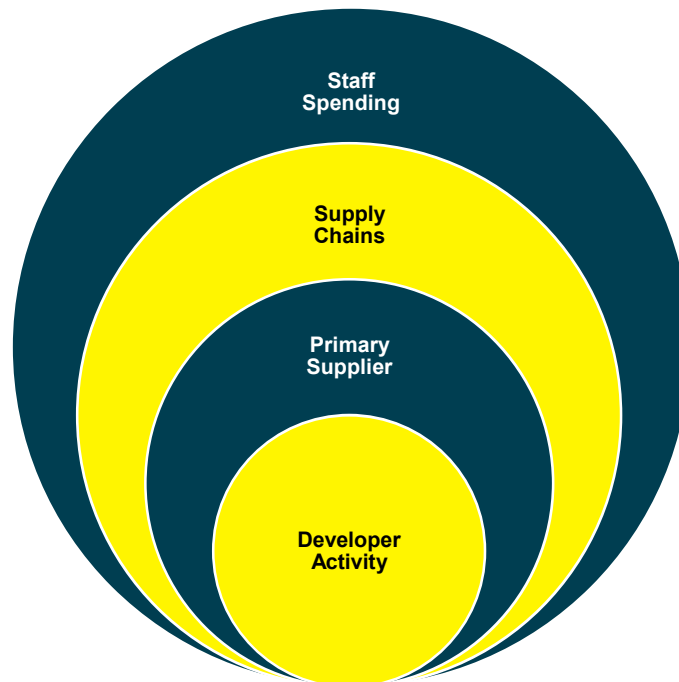


Figure 3-1: Types of Economic Impact.

3.1.1.5

In addition to estimating the total economic impact, it was necessary to estimate the net economic impact based on guidance provided by the Marine Analytical Unit (2020¹⁸), i.e. the impact compared with a counterfactual of the Proposed Development not proceeding. Factors that were considered include:

- **Deadweight:** this is the activity that would have taken place without the Proposed Development proceeding. It was assumed that there would be no deadweight (i.e., no impact if the Proposed Development didn't go ahead);
- **Leakage:** the proportion of activity that might occur outside the socio-economic study areas. This is accounted for by considering the share of spend that occurs in each study area (see Section 2.2.2);
- **Displacement:** the extent to which activity generated by the Proposed Development might displace existing activity elsewhere in the socio-economic study areas. Whilst it is likely that the Proposed Development would compete for resources with other proposed projects, such effects are more likely to relate to the timing of activity. This is discussed further within Volume 6, Chapter 2: Socio-economics, Tourism and Recreation; and
- **Multipliers:** this is the wider activity resulting from spending in the supply chain and spending by employees and primary suppliers. The multiplier effects are included in the analysis.

3.2 Metrics of Assessment

3.2.1.1

The economic impact has been assessed using three common measures of economic activity, as determined by BiGGAR Economics' (hereafter referred to as the 'technical expert') professional judgement and experience:

- **Gross Value Added (GVA):** this is a measure of economic output; the economic value added by an organisation or industry. It is typically estimated by subtracting the non-staff costs from the revenues of an organisation;
- **Years of Employment:** this is a measure of employment which is equivalent to one person being employed for an entire year and is typically used when considering short-term employment impact, such as construction employment. This is full-time equivalent (FTE) unless stated otherwise; and
- **Employment (Jobs):** a measure of employment which considers the headcount employment in an organisation or industry. This is FTE unless stated otherwise.

3.3 Estimating Economic Impact

- 3.3.1.1 An offshore wind economic model has been designed by the technical expert to assess the economic impacts associated with offshore wind farms and applied to the Proposed Development. The principle of this model has been applied to a number of onshore and offshore wind farm developments and is based on the level of expenditure expected to be associated with construction and with operation and maintenance. An overview of the model is provided in Figure 3-2.
- 3.3.1.2 The first step in assessing the economic impact was estimating the total expenditure, which was based on the Applicant's Supply Chain Development Statement (SCDS) (Ocean Winds, 2023¹⁹) and other information provided by the Applicant. This is discussed in more detail in Section 3.4.2
- 3.3.1.3 Expenditure was broken down into detailed sub-categories, based on information from the Applicant, sector studies such as BVG Associates Guide to an Offshore Wind Farm (BVG Associates, 2019²⁰) and the technical expert's modelling.
- 3.3.1.4 Using data from the SCDS and technical expert's own experience of the sector, assumptions were then made about the share of spend associated with each category of expenditure that could be secured in each socio-economic study area, which is also known as leakage (as discussed under paragraph 3.1.1.5).
- 3.3.1.5 Each contract was also assigned to one or more relevant sectors of the economy. To estimate the direct GVA and direct employment impact, data was used from the UK Annual Business Statistics (ONS, 2022²¹), which collects data on turnover, employment and GVA by sector. On this basis, it was possible to estimate the expected FTE employment supported by a given level of turnover in a sector (e.g. expenditure divided by the turnover per employee ratio). Similarly, GVA was estimated by dividing turnover by the turnover/GVA ratio.
- 3.3.1.6 Indirect (supply chain) and induced (staff spending) impacts were then estimated by applying economic multipliers from the Scottish and UK Input Output Tables (ONS, 2023²²; Scottish Government, 2022²³). This collects data on the linkages between different sectors of the economy which allows the wider effects in the economy to be captured, e.g. the impact of £1 million GVA in the construction sector may support impacts in the architecture and engineering sector. These figures are applied to the direct GVA and employment estimates.
- 3.3.1.7 Direct, indirect, and induced effects are then summed to estimate the total GVA, and employment impacts associated with the Proposed Development.



Figure 3-2: Economic Impact Methodology and Data Source.

3.4 Information Requirements and Data Sources

3.4.1.1 The assessment requires knowledge of a series of parameters including:

- Number of turbines and their capacity;
- Foundations type (floating or fixed);
- Costs by project element;
- Estimates of content by study area; and
- Timescales of activity.

3.4.1.2 Key sources of information, include:

- Publicly available information as presented in the Caledonia Onshore and Offshore Scoping Reports (Volume 7, Appendix 1: Onshore Scoping Report and Volume 7, Appendix 2: Offshore Scoping Report);
- Commercial data from the Developer, including the Supply Chain Development Statement (SCDS) (Caledonia Offshore Wind Farm Limited, 2021²⁴; 2023²⁵);
- Classification of economic activity from the ONS 'Standard Industrial Classification of Economic Activity' (ONS, 2022²¹);
- Scottish Annual Business Statistics for data on GVA, turnover and employment across Scotland (Scottish Government, 2022²³);
- UK Annual Business Survey for data on GVA, turnover and employment across the UK (ONS, 2022²¹);
- Scottish Government Input-Output GVA and employment multipliers for Type 1 impacts (supply chain spending) and Type 2 impacts (supply chain spending and staff spending) (Scottish Government, 2022²⁶); and
- UK Input-Output GVA and employment multipliers for Type 1 and Type 2 impacts (ONS, 2023²⁷).

3.4.2 Supply Chain Development Statement

3.4.2.1 The starting point for establishing the economic impact was the expenditure that is expected to be associated with the Proposed Development. The SCDS provides estimates of the share of expenditure in Scotland, the rest of the UK (theoretically minus Scotland), and elsewhere across two scenarios (commitment and ambition) associated with four categories of expenditure:

- Development;
- Manufacturing and fabrication;
- Installation; and
- Operation and Maintenance (the first six years).

- 3.4.2.2 The SCDS was submitted in July 2021 and updated in April 2023, increasing the installed capacity from 1GW to 2GW. It is anticipated that the next update will be published no later April 2026.
- 3.4.2.3 The SCDS provides information on two scenarios: a commitment scenario which sets out the minimum level of spending that is planned in Scotland and the UK as part of the project, and the ambition scenario, which is highest level of potential spending in Scotland and the UK.
- 3.4.2.4 In the commitment scenario presented in the SCDS, it was expected that the total expenditure during the development and construction (including manufacturing and fabrication and installation) phase would be £<Redacted> million in Scotland and £<Redacted> million in the rest of the UK (see Volume 7, Appendix 1: Onshore Scoping Report and Volume 7, Appendix 2: Offshore Scoping Report). This includes:
- £<Redacted> million on development in Scotland (such as studies, surveys, analysis and resources required to obtain planning consent), and £<Redacted> million on development in the rest of the UK;
 - £<Redacted> million on manufacturing and fabrication in Scotland (including wind turbine engines, blades and towers, floating foundations, mooring and anchoring, inter-array and interconnector cables, onshore and offshore substation fabrication and the operation and maintenance base construction), and £<Redacted> million in the rest of the UK; and
 - £<Redacted> million on installation in Scotland (including foundation and mooring installation, onshore wind turbine and foundation assembly works, onshore substation construction and installation and export cable route works), and £<Redacted> million on installation in the rest of the UK.
- 3.4.2.5 In addition, there is expected to be operation and maintenance spend of £<Redacted> million per year in Scotland and £<Redacted> million per year in the rest of the UK. This is expected to include operating and maintaining the offshore wind turbines and infrastructure associated with the Proposed Development, inspections, rents and transmission charges. The Proposed Development’s lifetime is expected to be 35 years.

Table 3-1: SCDS Commitment Scenario based on 2GW.

	Scotland (£ million)	Rest of UK (£ million)
Development	<Redacted>	<Redacted>
Manufacturing and Fabrication	<Redacted>	<Redacted>
Installation	<Redacted>	<Redacted>
Total Development and Construction	<Redacted>	<Redacted>
Annual Operation and Maintenance	<Redacted>	<Redacted>

3.4.2.6 In the ambition scenario presented in the SCDS, it was expected that the total expenditure during the development and construction (including manufacturing and fabrication and installation) phase would be £<Redacted> million in Scotland and £<Redacted> million in the rest of the UK (see Volume 7, Appendix 1: Onshore Scoping Report and Volume 7, Appendix 2: Offshore Scoping Report) In addition, there is expected to be operation and maintenance spend of £<Redacted> million per year in Scotland.

Table 3-2: SCDS Ambition Scenario based on 2GW.

	Scotland (£ million)	Rest of the UK (£ million)
Development	<Redacted>	<Redacted>
Manufacturing and Fabrication	<Redacted>	<Redacted>
Installation	<Redacted>	<Redacted>
Total Development and Construction	<Redacted>	<Redacted>
Annual Operation and Maintenance	<Redacted>	-

3.4.2.7 Each of these categories of spend was then split into sub-categories based on the technical expert’s offshore wind economic model (described in Section 3.3) incorporating a detailed breakdown of cost categories based on industry data, including BVG Associates Guide to a Floating Offshore Wind Farm (BVG Associates, 2023²⁰).

3.4.2.8 The expenditure associated with the Proposed Development presented in the SCDS is expected to be split equally between Caledonia North and Caledonia South, with a share of spending also associated with the OnTI.

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