



# Morven South Offshore Wind Array Project

Environmental Impact Assessment Report

**Volume 3, Annex 17.1: Socio-Economics Shared  
Economics Technical Report**

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## Table of contents

<b>1</b>	<b>Introduction .....</b>	<b>1</b>
<b>2</b>	<b>Methodology.....</b>	<b>3</b>
2.2	Approach to impacts from offshore wind .....	3
2.3	Data sources.....	5
2.4	Input output modelling.....	5
<b>3</b>	<b>Economic impact of Morven North and Morven South, Morven Hawthorn Pit Grid Connection Project and Morven Branxton Area Grid Connection Project<sup>8</sup></b>	
3.1	Introduction.....	8
3.2	Economic impact of Morven North or Morven South.....	8
3.3	Cumulative economic impacts (Morven North or Morven South and Morven Branxton Area Grid Connection Project) .....	12
3.4	Cumulative Economic Impacts (Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project) .....	16
<b>4</b>	<b>Economic impacts of Morven North or Morven South in local areas .....</b>	<b>20</b>
4.2	Local area impacts for Morven North or Morven South.....	20
<b>5</b>	<b>Summary .....</b>	<b>22</b>
5.2	Economic impact of Morven North or Morven South.....	22
5.3	Morven cumulative economic impacts .....	22
5.4	Economic impacts in local areas .....	23
<b>6</b>	<b>Port Local Socio-Economic Study Areas .....</b>	<b>24</b>
6.1	Aberdeen Port Local Socio-Economic Study Area.....	24
6.2	Ardersier Port Local Socio-Economic Study Area.....	25
6.3	Buckie Port Local Socio-Economic Study Area.....	26
6.4	Burntisland Port Local Socio-Economic Study Area.....	27
6.5	Cromarty Firth Port Local Socio-Economic Study Area.....	28
6.6	Dundee Port Local Socio-Economic Study Area .....	29
6.7	Fraserburgh Port Local Socio-Economic Study Area.....	30
6.8	Leith Port Local Socio-Economic Study Area.....	31
6.9	Macduff Port Local Socio-Economic Study Area.....	32
6.10	Methil Port Local Socio-Economic Study Area.....	33
6.11	Montrose Port Local Socio-Economic Study Area.....	34
6.12	Nigg Port Local Socio-Economic Study Area .....	35
6.13	Peterhead Port Local Socio-Economic Study Area.....	36
6.14	Rosyth Port Local Socio-Economic Study Area .....	37
6.15	Scapa Deep Water Quay Local Socio-Economic Study Area .....	38
6.16	Wick Port Local Socio-Economic Study Area.....	39
<b>7</b>	<b>References .....</b>	<b>40</b>

## List of tables

Table 3.1: Morven North or Morven South development and construction Gross Value Added impact (£m) ...	8
Table 3.2: Morven North or Morven South development and construction Gross Value Added impact (£m) ..	9
Table 3.3: Morven North or Morven South development and construction employment impact (years of employment).....	9
Table 3.4: Morven North or Morven South development and construction direct employment impact by contract type (years of employment) .....	9
Table 3.5: Morven North or Morven South annual operation and maintenance spending (£m) .....	11
Table 3.6: Morven North or Morven South annual operation and maintenance Gross Value Added impact (£m) .....	11
Table 3.7: Morven North or Morven South annual operation and maintenance employment impact (jobs) ...	11
Table 3.8: Morven North or Morven South decommissioning spending (£m) .....	12
Table 3.9: Morven North or Morven South decommissioning Gross Value Added impact (£m) .....	12
Table 3.10: Morven North or Morven South decommissioning employment impacts (years of employment)	12
Table 3.11: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction spending (£m) .....	13
Table 3.12: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction impact (£m) .....	13
Table 3.13: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction employment impact (years of employment) .....	13
Table 3.14: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance spending (£m).....	13
Table 3.15: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance impact (£m).....	14
Table 3.16: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance employment impact (jobs) .....	14
Table 3.17: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning spending (£m) .....	14
Table 3.18: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning impact (£m) .....	16
Table 3.19: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning employment impact (years of employment) .....	16
Table 3.20: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction spending (£m) .....	16
Table 3.21: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction impact (£m) .....	17
Table 3.22: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction employment impact (years of employment) .....	17
Table 3.23: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance spending (£m).....	17

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Table 3.24: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance impact (£m).....	18
Table 3.25: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance employment impact (jobs) .....	18
Table 3.26: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning spending (£m) .....	18
Table 3.27: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning impact (£m) .....	18
Table 3.28: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning employment impact (years of employment) .....	19
Table 4.1: Morven North or Morven South construction port(s) direct impact .....	20
Table 4.2: Morven North or Morven South operation and maintenance port(s) direct impact .....	21

## List of figures

Figure 1.1: The boundaries of Morven North and Morven South within the Morven Option Lease Agreement Site.....	2
Figure 2.1: Economic Impact Methodology and Data Sources .....	4
Figure 2.2: Direct Gross Value Added impact – worked example.....	6
Figure 2.3: Indirect Gross Value Added impact – worked example .....	6
Figure 2.4: Induced Gross Value Added impact – worked example .....	6
Figure 2.5: Total Gross Value Added impact – worked example .....	6
Figure 6.1: Aberdeen Port Local Socio-Economic Study Area.....	24
Figure 6.2: Ardersier Port Local Socio-Economic Study Area.....	25
Figure 6.3: Buckie Port Local Socio-Economic Study Area.....	26
Figure 6.4: Burntisland Port Local Socio-Economic Study Area.....	27
Figure 6.5: Cromarty Firth Port Local Socio-Economic Study Area.....	28
Figure 6.6: Dundee Port Local Socio-Economic Study Area .....	29
Figure 6.7: Fraserburgh Port Local Socio-Economic Study Area.....	30
Figure 6.8: Leith Port Local Socio-Economic Study Area.....	31
Figure 6.9: Macduff Port Local Socio-Economic Study Area.....	32
Figure 6.10: Methil Port Local Socio-Economic Study Area .....	33
Figure 6.11: Montrose Port Local Socio-Economic Study Area.....	34
Figure 6.12: Nigg Port Local Socio-Economic Study Area .....	35
Figure 6.13: Peterhead Port Local Socio-Economic Study Area.....	36
Figure 6.14: Rosyth Port Local Socio-Economic Study Area .....	37
Figure 6.15: Scapa Deep Water Quay Local Socio-Economic Study Area .....	38
Figure 6.16: Wick Port Local Socio-Economic Study Area.....	39

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# 1 Introduction

- 1.1.1.1 The Morven North Offshore Wind Array Project (hereafter, 'Morven North') and the Morven South Offshore Wind Array Project (hereafter, 'Morven South') are both located within the Morven Option Lease Agreement Site (hereafter, the "Morven Site") in Scottish offshore waters (Figure 1.1). Morven North is located approximately 61km from the Aberdeenshire coast (at its closest point) and Morven South is located approximately 86km from the Aberdeenshire coast (at its closest point). Both Morven North and Morven South will comprise wind turbines, Offshore Substation Platforms (OSPs), associated foundations, inter-array and interconnector cables and cable protection. Consent for the offshore export cables of Morven North and Morven South will be sought separately.
- 1.1.1.2 Morven North is situated northwest of Morven South. The external boundaries of Morven North and Morven South correspond with the boundaries of the Morven Site.
- 1.1.1.3 This Morven North and Morven South Socio-Economics Shared Economics Technical Report (hereafter referred to as the Shared Economics Technical Report) sets out the contribution that Morven North and Morven South are expected to make to the Scottish and UK economies, and in the economies of the local areas around construction and operations and maintenance (O&M) port(s).
- 1.1.1.4 The socio-economic assessments in the Morven North Environmental Impact Assessment (EIA) Report and the Morven South EIA Report will consider both economic and social impacts. However, this Shared Economics Technical Report focuses on the economic impacts.
- 1.1.1.5 While consent for the Morven Hawthorn Pit Grid Connection Project (hereafter, "MHPGC Project") and Morven Branxton Grid Connection Project (hereafter, "MBAGC Project") will be sought separately, this Shared Economics Technical Report includes the economic impacts of the MHPGC Project and MBAGC Project. This supports the cumulative assessments included in the Morven North EIA Report and the Morven South EIA Report.
- 1.1.1.6 The purpose of this Shared Economics Technical Report is to provide:
- detail on the methodology, assumptions and the calculation of the economic impact estimates of Morven North, Morven South, the MHPGC Project and the MBAGC Project;
  - an overview of the economic impacts expected to be associated with Morven North, Morven South, the MHPGC Project and the MBAGC Project.
- 1.1.1.7 The economic impact assessment draws on a range of information, including publicly available information about the development of the sector, commercial data from the Applicant and BiGGAR Economics' experience in the offshore wind sector.
- 1.1.1.8 The Shared Economics Technical Report follows the following structure:
- Section 2 provides an overview of the methodology;
  - Section 3 quantifies the economic impacts expected to be associated with Morven North, Morven South, the MHPGC Project and the MBAGC Project;
  - Section 4 quantifies the economic impacts expected in local areas in the vicinity of construction and O&M port(s);
  - Section 5 provides a summary of economic impacts.

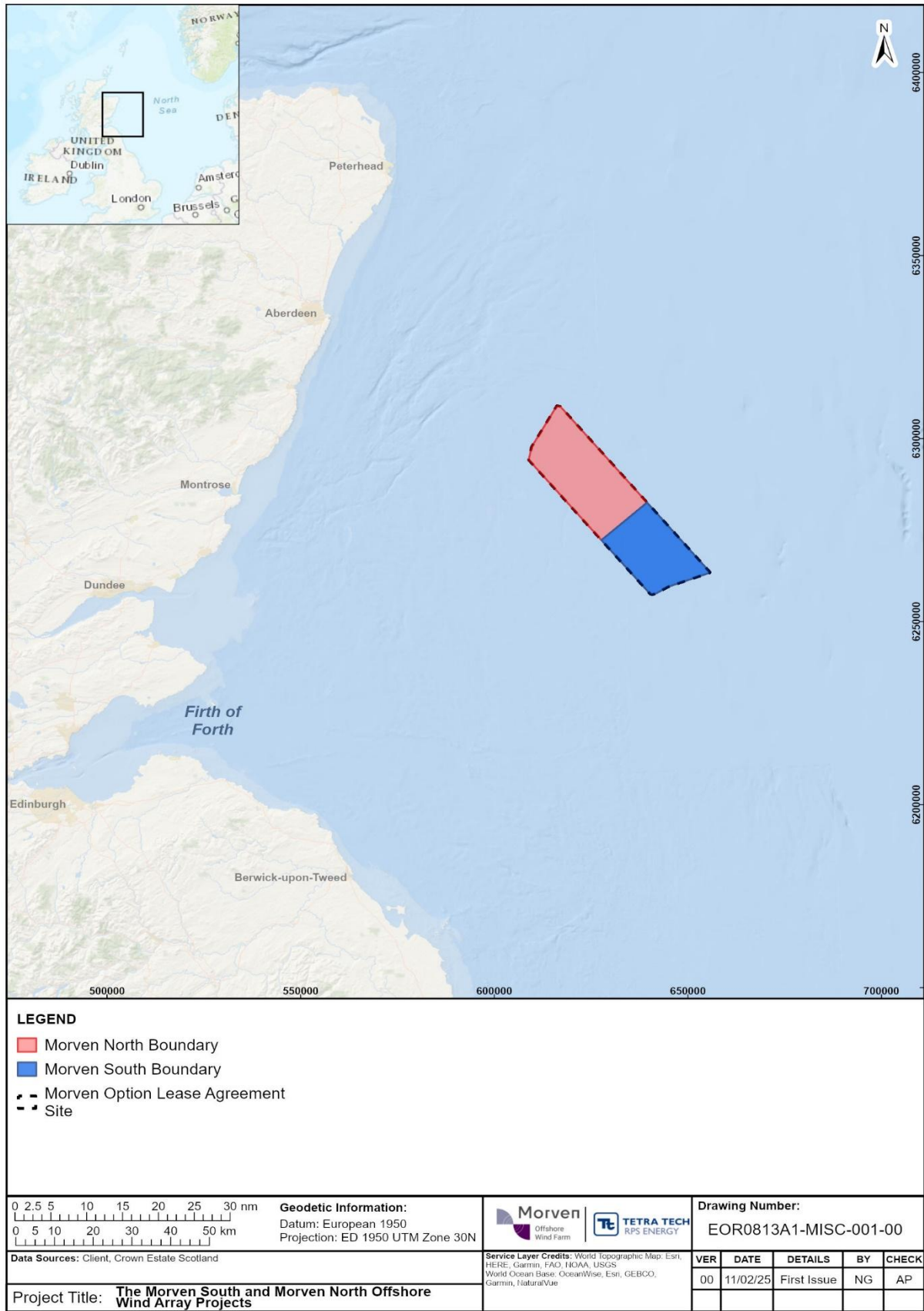


Figure 1.1: The boundaries of Morven North and Morven South within the Morven Option Lease Agreement Site

## 2 Methodology

2.1.1.1 This section outlines the methodology for assessing economic impacts.

### 2.2 Approach to impacts from offshore wind

2.2.1.1 The estimation of the economic benefits is based on a purposely-built tool developed by BIGGAR Economics, which has been used in several EIAs (e.g. the consented Greenvolt Offshore Wind Farm) that have been approved by regulators, including MD-LOT and MD-SEDD. The analysis is based on an Input-Output methodology built upon the following steps, as set out in Figure 2.1:

- estimation of the total investment (development and construction, O&M and decommissioning);
- estimation of contract value by type (that is, how the investment is expected to be split across several types of contracts for different types of goods and services);
- estimation of contract content by study area (that is, the proportion of each contract type that could be secured within the local, Scottish or UK economies);
- conversion of contract values into the direct employment supported (based on the turnover per employee in the relevant sectors for the suppliers of each different type of goods and services);
- estimation of direct Gross Value Added (GVA) based on direct employment supported;
- estimation of supply chain (indirect) impacts on GVA and employment;
- estimation of induced impacts on GVA and employment.

2.2.1.2 The level of decommissioning spending is not available at this stage but the analysis includes the decommissioning phase, based on industry expectations of the scale of spending required and on the assumption that the contract types will be similar to the construction phase.



**Figure 2.1: Economic Impact Methodology and Data Sources**

Source: BiGGAR Economics

## 2.3 Data sources

2.3.1.1 The assessment requires information from a number of sources, including:

- BiGGAR Economics experience working with developers in the offshore wind sector and publicly available data, including BVG Associates' Guide to an Offshore Wind Farm (BVG Associates, 2021a; 2025);
- commercial data from the Applicant (Morven Offshore Wind Farm, 2023);
- classification of economic activity from the ONS Standard Industrial Classification of Economic Activity (ONS, 2024a);
- Scottish Annual Business Statistics for data on GVA, turnover and employment across Scotland (Scottish Government, 2024a);
- UK Annual Business Survey for data on GVA, turnover and employment across the UK (ONS, 2024a);
- 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, 2024a);
- UK Input-Output GVA and employment multipliers for Type 1 and Type 2 impacts (ONS, 2024b).

2.3.1.2 As the information on expenditure is based on the Supply Chain Development Statement (SCDS), which is in 2023 prices, the economic impacts are presented in 2023 prices. An updated SCDS is expected to be submitted in 2026.

## 2.4 Input output modelling

2.4.1.1 Economic impacts are expressed in terms of:

- GVA: a measure of economic activity expressed as the difference between an organisation's turnover and its non-staff operational expenditure;
- years of employment: a measure of short-term employment used in the context of jobs associated with development and construction activity. As an example, a job lasting for 18 months is equivalent to 1.5 years of employment;
- jobs: a measure of employment used to reflect long-term employment such as during the O&M phase.

2.4.1.2 The assessment of GVA and employment impacts includes:

- Direct economic impacts: economic impact associated with the activity of primary contractors involved in development and construction, O&M and decommissioning. This was captured using the ratio of turnover to GVA and employment in relevant sectors (e.g. the level of employment supported by a given expenditure (Scottish Government, 2024a) (ONS, 2024a);
- Indirect economic impacts: economic impact associated with the spending taking place across the supply chain of those businesses involved in development and construction, O&M and decommissioning. This was captured using indirect (Type 1) economic multipliers (Scottish Government, 2024b) (ONS, 2024b);
- Induced economic impacts: economic impact associated with staff spending in the wider economy from businesses, involved in development and construction, O&M and decommissioning. This was captured using induced (Type 2 minus Type 1) economic multipliers (Scottish Government, 2024b) (ONS, 2024b).

### 2.4.2 Worked example

2.4.2.1 This section provides a worked example of how the direct, indirect and induced GVA impacts have been calculated.

2.4.2.2 Expenditure was first broken down by contract type in each study area and the relevant economic sector was identified for each contract type. To determine the direct GVA impact the relevant

turnover to GVA ratios from the ONS Annual Business Survey (ONS, 2024a) and the Scottish Government’s Annual Business Statistics (Scottish Government, 2024a) were applied, as follows:



Figure 2.2: Direct Gross Value Added impact – worked example

2.4.2.3 Alongside the direct impact generated by the project, there will be an impact on the supply chain of those businesses being awarded project-related contracts. To estimate indirect impacts, Type 1 multipliers were sourced from the Scottish and UK Input-Output Tables (Scottish Government, 2024b) (ONS, 2024b), and applied as follows:

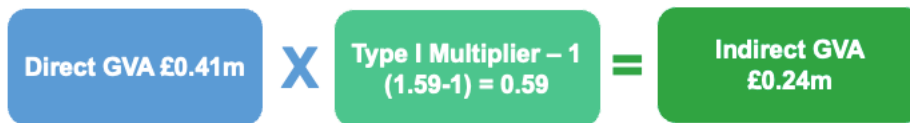


Figure 2.3: Indirect Gross Value Added impact – worked example

2.4.2.4 The analysis also reports on induced impacts, which are the result of those employed to carry out project-related work spending their salaries and wages across the economy. To include induced impacts, it was necessary to apply Type 2 Scottish and UK multipliers (Scottish Government, 2024b) (ONS, 2024b), which include both indirect and induced effects, as follows:

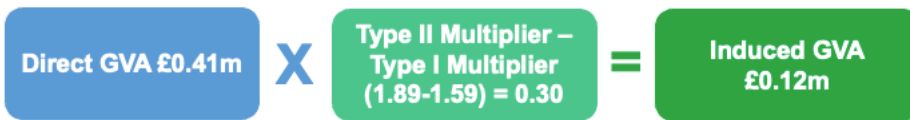


Figure 2.4: Induced Gross Value Added impact – worked example

2.4.2.5 The direct, indirect and induced impacts are then added to give the total impact, as follows:



Figure 2.5: Total Gross Value Added impact – worked example

2.4.2.6 In accordance with the scoping response from the Marine Analytical Unit (Marine Analytical Unit, 2022), the assessment also considers:

- Deadweight: any economic activity that would take place anyway, even if Morven North or Morven South did not proceed. Morven North and Morven South require substantial capital investment, and it has been assumed that if they did not proceed this capital investment would not take place;
- Leakage: when expenditure takes place in an economy, not all of that expenditure is retained within that economy. Some of the spending may benefit other economies. This is known as leakage. Leakage has been accounted for in the analysis by making assumptions on the proportion of each category of expenditure (for each contract type) that directly benefits the economy in each study area;

- 
- Displacement: economic activity that would not happen as a consequence of Morven North or Morven South, for example because they use resources that would otherwise be used by another project. The cumulative effects assessment considers the impacts associated with other offshore wind developments, including whether Scottish and UK activity would be displaced;
  - Substitution: activity that would have occurred without government intervention. The Applicant has a number of global investment opportunities. Any investment attracted by government intervention is not expected to substitute any other investment in the UK economy and so it was not necessary to adjust the analysis for substitution.

### 3 Economic impact of Morven North and Morven South, Morven Hawthorn Pit Grid Connection Project and Morven Branxton Area Grid Connection Project

#### 3.1 Introduction

3.1.1.1 Applying the methodology set out in Section 2, this section sets out the economic impacts associated with Morven North and Morven South as well as two cumulative scenarios: Morven North or Morven South and the MBAGC Project; and Morven North or Morven South and the MHPGC Project. This includes the development and construction phase, the O&M phase and the decommissioning phase.

#### 3.2 Economic impact of Morven North or Morven South

3.2.1.1 The economic impacts of Morven North and Morven South are included in the socio-economic assessments of two separate EIAs. The scale of development and level of investment required are expected to be similar for Morven North and Morven South and therefore their economic impacts will be similar. Therefore, the following section has been presented for one and applies equally to each development independently. These have been referred through throughout as “Morven North or Morven South”.

##### 3.2.2 Development and construction (Morven North or Morven South)

3.2.2.1 It is anticipated that the total expenditure associated with the development and construction of Morven North or Morven South will be £2.75 billion each (excluding the MHPGC Project and MBAGC Project). Assumptions were made about the share of each contract type that could be secured in Scotland and the UK, and this was used to inform the economic impact assessment.

3.2.2.2 It is anticipated that the largest economic opportunities for Scotland and the UK will relate to wind turbine assembly and installation, though the majority of wind turbine components will be secured from outside of the UK. Further economic opportunities will be associated with the manufacture and installation of foundations (though the majority of these are expected to be manufactured outside of the UK) and development and consenting services.

3.2.2.3 On this basis, it was assumed development and construction expenditure of £438 million would be secured in Scotland and £657 million in the UK (including Scotland) (Table 3.1).

**Table 3.1: Morven North or Morven South development and construction Gross Value Added impact (£m)**

	Scotland	UK
Expenditure	438	657

3.2.2.4 As set out Section 2.4, the economic impact of this expenditure was then estimated by applying ratios of turnover/GVA and turnover per employee for the relevant sectors, and the indirect (supplier) spending and induced (staff spending) impacts were then estimated by applying economic multipliers.

3.2.2.5 On this basis, it was estimated that the total economic impact of Morven North or Morven South would be £303 million GVA and 4,290 years of employment in Scotland and £703 million GVA and 10,300 years of employment in the UK (including Scotland) (Table 3.2 and Table 3.3).

**Table 3.2: Morven North or Morven South development and construction Gross Value Added impact (£m)**

	Scotland	UK
Direct	174	255
Indirect	78	255
Total (Direct + Indirect)	252	510
Induced	51	192
Total	303	703

**Table 3.3: Morven North or Morven South development and construction employment impact (years of employment)**

	Scotland	UK
Direct	2,550	3,530
Indirect	1,130	4,000
Total (Direct + Indirect)	3,680	7,530
Induced	610	2,770
Total	4,290	10,300

3.2.2.6 The development and construction employment will be across a number of different contract types. Analysis of the direct employment shows that the largest opportunities for Scottish employees are related to foundation manufacturing followed by wind turbine assembly and installation. At the UK level, the largest opportunity relates to wind turbine contracts, including blade manufacturing (Table 3.4).

**Table 3.4: Morven North or Morven South development and construction direct employment impact by contract type (years of employment)**

	Scotland	UK
Foundations	850	850
Wind turbine	650	1,420
Development and Consenting Services	450	540
Offshore Substation	260	330
Foundations Installation	250	250

### 3.2.3 Operation and maintenance (Morven North or Morven South)

3.2.3.1 Based on information from the Applicant, it was estimated that the average annual O&M expenditure for Morven North or Morven South is expected to be £29 million each.

3.2.3.2 This was broken down into smaller categories of expenditure, and assumptions were made about the share of expenditure expected to be secured in Scotland and the UK. The largest opportunities in Scotland are expected to be in wind turbine maintenance and service, maintaining balance of plant and providing operation offshore logistics.

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**3.2.3.3** On this basis, it is anticipated that £10 million of annual O&M expenditure would be secured in Scotland and £19 million in the UK (including Scotland) (Table 3.5).

**Table 3.5: Morven North or Morven South annual operation and maintenance spending (£m)**

	Scotland	UK	Total
Expenditure	10	19	29

3.2.3.4 Applying appropriate economic ratios and multipliers (as set out in Section 2.4), it was estimated that the annual economic impact from O&M would £6 million GVA and 80 jobs in Scotland, and £18 million GVA and 230 jobs in the UK (including Scotland) (Table 3.6 and Table 3.7).

**Table 3.6: Morven North or Morven South annual operation and maintenance Gross Value Added impact (£m)**

	Scotland	UK
Direct	4	7
Indirect	1	6
Total (Direct + Indirect)	5	12
Induced	1	5
Total	6	18

**Table 3.7: Morven North or Morven South annual operation and maintenance employment impact (jobs)**

	Scotland	UK
Direct	2,550	3,530
Indirect	1,130	4,000
Total (Direct + Indirect)	3,680	7,530
Induced	610	2,770
Total	4,290	10,300

### 3.2.4 Decommissioning (Morven North or Morven South)

3.2.4.1 While the level of decommissioning spend was not provided as part of the SCDS, industry studies (BVG Associates, 2021b) suggest that the cost of decommissioning an offshore wind farm the size of Morven North or Morven South could be around £249 million each in 2023 prices.

3.2.4.2 Based on conservative industry analysis of Scotland and the UK's ability to secure decommissioning contracts (BVG Associates, 2021b), it was assumed that 30% of contracts would be secured in Scotland. It should be noted that decommissioning is expected to take place several decades after the time of writing and so it is possible that the capacity of the Scottish and UK economies to undertake decommissioning work may change in that period.

3.2.4.3 It is anticipated that the largest economic opportunities for Scotland will relate to foundation decommissioning and cable decommissioning. Further economic opportunities will be associated with wind turbine decommissioning, substation decommissioning and mooring and anchoring decommissioning.

3.2.4.4 On this basis, it was anticipated that £75 million of decommissioning expenditure secured in the UK, all of which is anticipated to be in Scotland (Table 3.8).

**Table 3.8: Morven North or Morven South decommissioning spending (£m)**

	Scotland	UK	Total
Expenditure	75	75	249

3.2.4.5 Applying appropriate economic ratios and multipliers (as set out in Section 2.4), it was estimated that the total economic impact from decommissioning Morven North or Morven South would be £39 million GVA and 480 years of employment in Scotland, and £60 million GVA and 730 years of employment in the UK (including Scotland) (Table 3.9 and Table 3.10).

**Table 3.9: Morven North or Morven South decommissioning Gross Value Added impact (£m)**

	Scotland	UK
Direct	23	23
Indirect	10	20
Total (Direct + Indirect)	33	43
Induced	7	17
Total	39	60

**Table 3.10: Morven North or Morven South decommissioning employment impacts (years of employment)**

	Scotland	UK
Direct	260	260
Indirect	130	260
Total (Direct + Indirect)	400	520
Induced	80	200
Total	480	730

### 3.3 Cumulative economic impacts (Morven North or Morven South and Morven Branxton Area Grid Connection Project)

3.3.1.1 This section sets out the cumulative economic impacts associated with Morven North or Morven South plus MBAGC Project. This includes the development and construction phase, the O&M phase and the decommissioning phase.

#### 3.3.2 Construction (Morven North or Morven South and Morven Branxton Area Grid Connection Project)

3.3.2.1 When Morven North or Morven South and MBAGC Project elements were combined it was assumed that total development and construction spending would be £517 million in Scotland and £747 million in the UK (Table 3.11).

**Table 3.11: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction spending (£m)**

	Scotland	UK	Total
Expenditure	517	747	3,293

3.3.2.2 The cumulative economic impact of Morven North or Morven South and the MBAGC Project during development and construction would be £356 million GVA and 4,960 years of employment in Scotland and £801 million GVA and 11,590 years of employment in the UK (Table 3.12 and Table 3.13).

**Table 3.12: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction impact (£m)**

	Scotland	UK
Direct	205	290
Indirect	91	289
Total (Direct + Indirect)	296	579
Induced	60	222
Total	356	801

**Table 3.13: Morven North or Morven South and Morven Branxton Area Grid Connection Project development and construction employment impact (years of employment)**

	Scotland	UK
Direct	2,960	3,990
Indirect	1,290	4,430
Total (Direct + Indirect)	4,250	8,430
Induced	700	3,160
Total	4,960	11,590

### 3.3.3 Operation (Morven North or Morven South and Morven Branxton Area Grid Connection Project)

3.3.3.1 When Morven North or Morven South and MBAGC Project elements were combined it was assumed that annual O&M spending would be £11 million in Scotland and £20 million in the UK (Table 3.14).

**Table 3.14: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance spending (£m)**

	Scotland	UK	Total
Expenditure	11	20	30

3.3.3.2 The cumulative economic impact of Morven North or Morven South and MBAGC Project during O&M would be £6 million GVA and 90 jobs in Scotland, and £19 million GVA and 240 jobs in the UK (Table 3.15 and Table 3.16).

**Table 3.15: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance impact (£m)**

	Scotland	UK
Direct	4	7
Indirect	2	6
Total (Direct + Indirect)	5	13
Induced	1	5
Total	6	19

**Table 3.16: Morven North or Morven South and Morven Branxton Area Grid Connection Project operation and maintenance employment impact (jobs)**

	Scotland	UK
Direct	50	90
Indirect	20	90
Total (Direct + Indirect)	70	170
Induced	10	60
Total	90	240

### 3.3.4 Decommissioning (Morven North or Morven South and Morven Branxton Area Grid Connection Project)

3.3.4.1 When Morven North or Morven South and MBAGC Project elements were combined it was assumed that annual O&M spending would be £83 million in Scotland and in the UK (Table 3.17).

**Table 3.17: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning spending (£m)**

	Scotland	UK	Total
Expenditure	83	83	276

- 
- 3.3.4.2 The cumulative economic impact of Morven North or Morven South and the MBAGC Project during the decommissioning phase was estimated to be £44 million GVA and 530 jobs in Scotland, and £67 million GVA and 800 jobs in the UK (Table 3.18 and Table 3.19).

**Table 3.18: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning impact (£m)**

	Scotland	UK
Direct	25	25
Indirect	11	22
Total (Direct + Indirect)	36	47
Induced	8	19
Total	44	67

**Table 3.19: Morven North or Morven South and Morven Branxton Area Grid Connection Project decommissioning employment impact (years of employment)**

	Scotland	UK
Direct	290	290
Indirect	150	290
Total (Direct + Indirect)	440	580
Induced	90	230
Total	530	800

### 3.4 Cumulative Economic Impacts (Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project)

3.4.1.1 This section sets out the cumulative economic impacts associated with Morven North or Morven South plus MHPGC Project. This includes the development and construction phase, the O&M phase and the decommissioning phase.

#### 3.4.2 Construction (Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project)

3.4.2.1 When Morven North or Morven South and MHPGC Project elements were combined it was assumed that total spending would be £478 million in Scotland and £758 million the UK (Table 3.20).

**Table 3.20: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction spending (£m)**

	Scotland	UK	Total
Expenditure	478	758	3,491

3.4.2.2 The cumulative economic impact of Morven North or Morven South and MHPGC Project during development and construction would be £334 million GVA and 4,730 years of employment in Scotland and £814 million GVA and 11,750 years of employment in the UK (Table 3.21 and Table 3.22).

**Table 3.21: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction impact (£m)**

	Scotland	UK
Direct	193	295
Indirect	84	292
Total (Direct + Indirect)	277	587
Induced	57	226
Total	334	814

**Table 3.22: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project development and construction employment impact (years of employment)**

	Scotland	UK
Direct	2,830	4,060
Indirect	1,220	4,480
Total (Direct + Indirect)	4,050	8,530
Induced	670	3,210
Total	4,730	11,750

### 3.4.3 Operation (Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project)

3.4.3.1 When Morven North or Morven South and MHPGC Project elements were combined it was assumed that annual O&M spending would be £10 million in Scotland and £20 million in the UK (Table 3.23).

**Table 3.23: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance spending (£m)**

	Scotland	UK	Total
Expenditure	10	20	30

3.4.3.2 The cumulative economic impact of Morven North or Morven South and the MHPGC Project during O&M would be £7 million GVA and 90 jobs in Scotland, and £19 million GVA and 240 jobs in the UK (Table 3.24 and Table 3.25).

**Table 3.24: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance impact (£m)**

	Scotland	UK
Direct	4	7
Indirect	2	6
Total (Direct + Indirect)	6	13
Induced	1	5
Total	7	19

**Table 3.25: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project operation and maintenance employment impact (jobs)**

	Scotland	UK
Direct	50	90
Indirect	20	90
Total (Direct + Indirect)	80	170
Induced	10	60
Total	90	240

### 3.4.4 Decommissioning (Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project)

3.4.4.1 When Morven North or Morven South and MHPGC Project elements were combined it was assumed that annual O&M spending would be £69 million in Scotland and £83 million in the UK (Table 3.26).

**Table 3.26: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning spending (£m)**

	Scotland	UK	Total
Expenditure	69	83	276

3.4.4.2 The cumulative economic impact of Morven North or Morven South and MHPGC Project during the decommissioning phase was estimated to be £36 million GVA and 440 jobs in Scotland, and £67 million GVA and 800 jobs in the UK (Table 3.27 and Table 3.28).

**Table 3.27: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning impact (£m)**

	Scotland	UK
Direct	21	25
Indirect	9	22
Total (Direct + Indirect)	30	47
Induced	6	19
Total	36	67

**Table 3.28: Morven North or Morven South and Morven Hawthorn Pit Grid Connection Project decommissioning employment impact (years of employment)**

	Scotland	UK
Direct	240	290
Indirect	120	290
Total (Direct + Indirect)	370	580
Induced	70	230
Total	440	800

## 4 Economic impacts of Morven North or Morven South in local areas

- 4.1.1.1 The analysis in Section 3 is focused on the economic impacts at the level of the Scottish and UK economies. Some of these impacts will be geographically concentrated in local areas, in particular around the construction and O&M port(s).
- 4.1.1.2 The construction and O&M port(s) are not yet known. However, it is possible to estimate the potential scale of the economic impact in the vicinity of the construction and O&M port(s), based on an analysis of the expenditure of that is expected to be associated with the port operations.
- 4.1.1.3 As there are substantial differences in the level of economic development between different ports (e.g. the number of other operators), and this would be likely to affect supply chain and staff spending impacts, the analysis has focused on direct impacts.
- 4.1.1.4 As with the previous analysis, the economic impacts in local areas associated with Morven North and Morven South are expected to be identical.

## 4.2 Local area impacts for Morven North or Morven South

### 4.2.1 Construction Port(s) Local Area Impact

- 4.2.1.1 The spend at the construction port(s) is expected to be around £133 million, of which the largest contract is expected to be associated with wind turbine assembly (£107 million).
- 4.2.1.2 Applying appropriate economic ratios (as set out in the methodology in Section 2.4), it was estimated that the direct economic impact in the vicinity of the construction port(s) would be £49 million GVA and 670 years of employment (Table 4.1).

**Table 4.1: Morven North or Morven South construction port(s) direct impact**

	Expenditure (£m)	GVA (£m)	Years of Employment
Wind turbine Assembly	107	39	520
Wind turbine Installation	13	4	50
Marshalling Harbour - Fixed	13	6	110
Total	133	49	670

### 4.2.2 Operation and Maintenance Port(s) local area impacts

- 4.2.2.1 The spend at the O&M port(s) is expected to be around £8 million annually, of which the largest contract is expected to be associated with wind turbine maintenance and service (£5 million).
- 4.2.2.2 Applying appropriate economic ratios, it was estimated that the direct economic impact in the vicinity of the O&M port(s) would be £3 million GVA annually and 36 jobs (Table 4.2).

**Table 4.2: Morven North or Morven South operation and maintenance port(s) direct impact**

	Expenditure (£m)	GVA (£m)	Jobs
Operational Offshore Logistics	<1	<1	<10
Health and Safety Inspections	<1	<1	<10
Wind Turbine Maintenance and Service	5	2	20
Balance of Plant Maintenance and Service	2	1	20
Total	8	3	36

## 5 Summary

- 5.1.1.1 The economic impact assessment presented in this report considers the economic impact of Morven North or Morven South as well as two cumulative scenarios: Morven North or South and the MBAGC Project and Morven North or South and the MHPGC Project. Economic impacts on the Scottish and UK economies have been estimated during the development and construction, O&M and decommissioning phases.
- 5.1.1.2 The starting point for the economic impact assessment was the information from the Applicant (Morven Offshore Wind Farm, 2023), which provide information on supply chain expenditure in Scotland and the UK.
- 5.1.1.3 The economic impacts in the local areas in the vicinity of construction and O&M port(s) have also been estimated.

## 5.2 Economic impact of Morven North or Morven South

- 5.2.1.1 Morven North and Morven South are expected to have a similar installed capacity and proportions of supply chain spending in the Scottish and UK economies. On that basis, the economic impact assessments of Morven North and Morven South are identical.
- 5.2.1.2 The economic impacts of Morven North or Morven South have been estimated as:
- during development and construction:
    - £303 million GVA and 4,290 years of employment in Scotland;
    - £703 million GVA and 10,300 years of employment in the UK (including Scotland);
  - during O&M:
    - £6 million GVA annually and 80 jobs in Scotland;
    - £18 million GVA and 230 jobs in the UK (including Scotland);
  - during decommissioning:
    - £39 million GVA and 480 years of employment in Scotland;
    - £60 million GVA and 730 years of employment in the UK (including Scotland).

## 5.3 Morven cumulative economic impacts

- 5.3.1.1 The cumulative economic impacts of Morven North or Morven South and the MBAGC Project have been estimated as:
- during development and construction:
    - £356 million GVA and 4,960 years of employment in Scotland;
    - £801 million GVA and 11,590 years of employment in the UK (including Scotland);
  - during O&M:
    - £6 million GVA annually and 90 jobs in Scotland;
    - £19 million GVA and 240 jobs in the UK (including Scotland);
  - during decommissioning:
    - £44 million GVA and 530 years of employment in Scotland;
    - £67 million GVA and 800 years of employment in the UK (including Scotland).
- 5.3.1.2 The cumulative economic impacts of Morven North or Morven South and MHPGC Project have been estimated as:

- during development and construction:
  - £334 million GVA and 4,730 years of employment in Scotland;
  - £814 million GVA and 11,750 years of employment in the UK (including Scotland);
- during O&M:
  - £7 million GVA annually and 90 jobs in Scotland;
  - £19 million GVA and 240 jobs in the UK (including Scotland);
- during decommissioning:
  - £36 million GVA and 440 years of employment in Scotland;
  - £67 million GVA and 800 years of employment in the UK (including Scotland).

## 5.4 Economic impacts in local areas

5.4.1.1 The construction and O&M port(s) are not yet known. However, it is possible to estimate the potential scale of the economic impact in the vicinity of the construction and O&M port(s), based on an analysis of the expenditure of that is expected to be associated with the port operations.

5.4.1.2 The economic impacts associated with spend at the port(s) have been estimated as:

- construction port(s): £49 million GVA and 670 years of employment;
- O&M port(s): £3 million annual GVA and 36 jobs.

## 6 Port Local Socio-Economic Study Areas

### 6.1 Aberdeen Port Local Socio-Economic Study Area

6.1.1.1 The Aberdeen Port Local Socio-Economic Study Area consists of the local authority of Aberdeen City and the electoral wards of Banchory and Mid Deeside; East Garioch; Ellon and District; Inverurie and District; Mid Formartine; North Kincardine West Garioch; and Westhill and District.

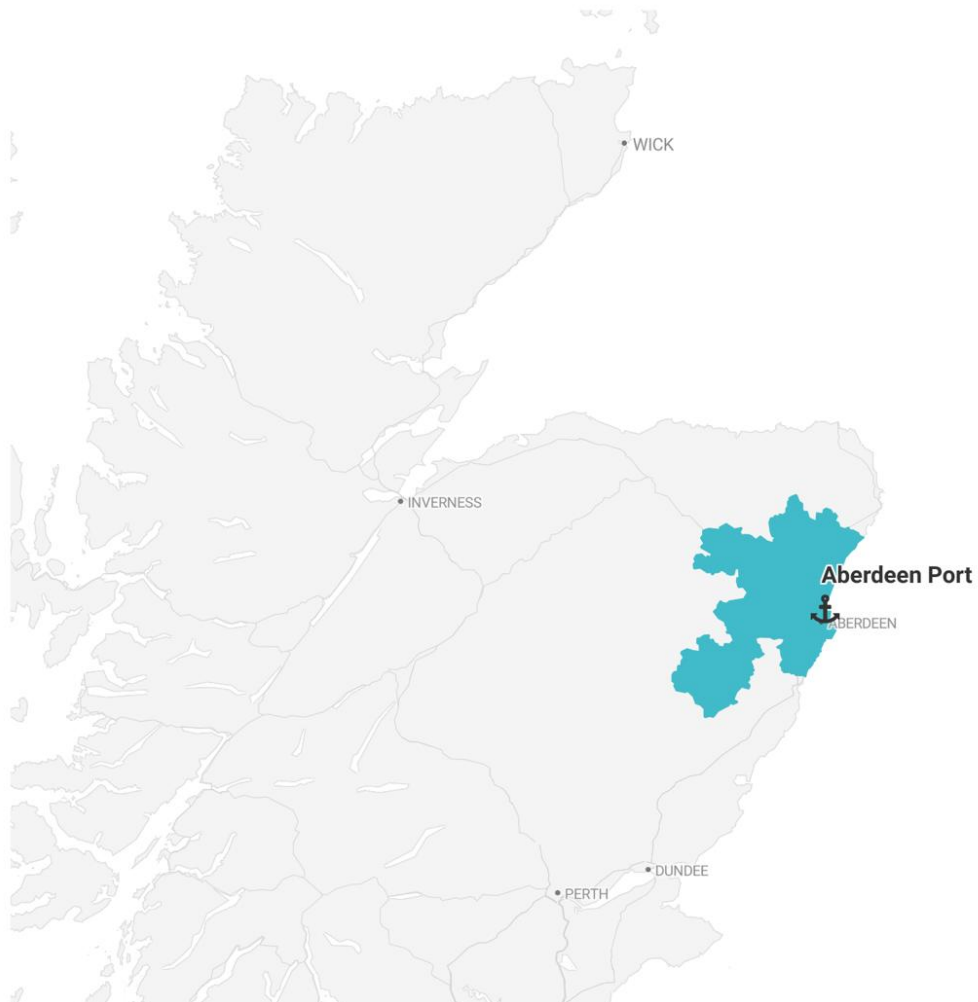


Figure 6.1: Aberdeen Port Local Socio-Economic Study Area

## 6.2 Ardersier Port Local Socio-Economic Study Area

6.2.1.1 The Ardersier Port Local Socio-Economic Study Area consists of the electoral wards of Culloden and Ardersier; Dingwall and Seaforth; Inverness Central; Inverness Millburn; Inverness Ness-side; Inverness South; Inverness West; and Nairn and Cawdor.

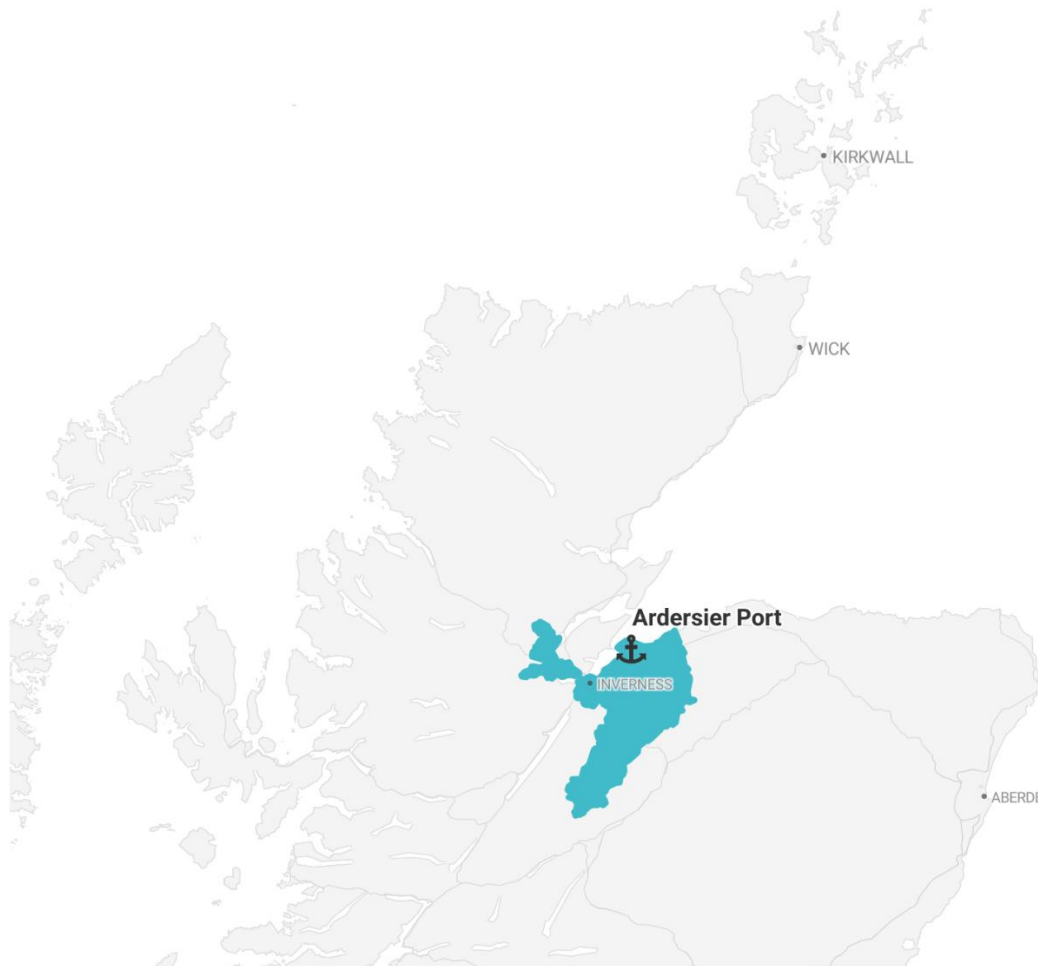


Figure 6.2: Ardersier Port Local Socio-Economic Study Area

## 6.3 Buckie Port Local Socio-Economic Study Area

6.3.1.1 The Buckie Port Local Socio-Economic Study Area consists of the electoral wards of Banff and District; Buckie; Elgin City North; Elgin City South; Fochabers Lhanbryde; Forres; Heldon and Laich; Huntly, Strathbogie and Howe of Alford; Keith and Cullen; Speyside Glenlivet; Troup; and Turriff and District.

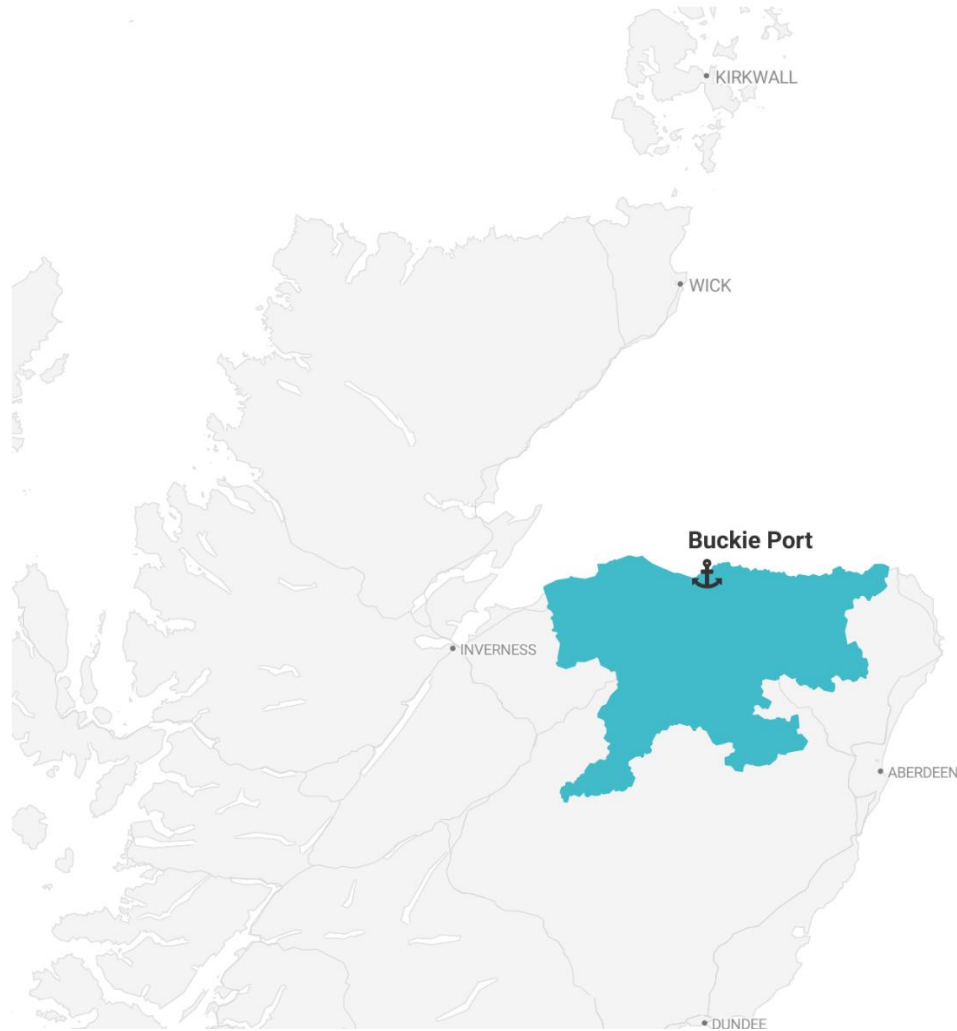


Figure 6.3: Buckie Port Local Socio-Economic Study Area

## 6.4 Burntisland Port Local Socio-Economic Study Area

6.4.1.1 The Burntisland Port Local Socio-Economic Study Area consists of the electoral wards of Buckhaven, Methil and Wemyss Villages; Burntisland, Kinghorn and Western Kirkcaldy; Clackmannanshire East; Clackmannanshire South; Cowdenbeath; Cupar; Dunfermline Central; Dunfermline North; Dunfermline South; Glenrothes Central and Thornton; Glenrothes North, Leslie and Markinch; Glenrothes West and Kinglassie; Howe of Fife and Tay Coast; Inverkeithing and Dalgety Bay; Kirkcaldy Central; Kirkcaldy East; Kirkcaldy North; Leven, Kennoway and Largo; Lochgelly, Cardenden and Benarty; Rosyth; and West Fife and Coastal Villages.



Figure 6.4: Burntisland Port Local Socio-Economic Study Area

## 6.5 Cromarty Firth Port Local Socio-Economic Study Area

6.5.1.1 The Cromarty Firth Port Local Socio-Economic Study Area consists of the electoral wards of Black Isle; Cromarty Firth; Dingwall and Seaforth; East Sutherland and Edderton; Inverness Central; Inverness Millburn; Inverness Ness-side; Inverness West; and Tain and Easter Ross.

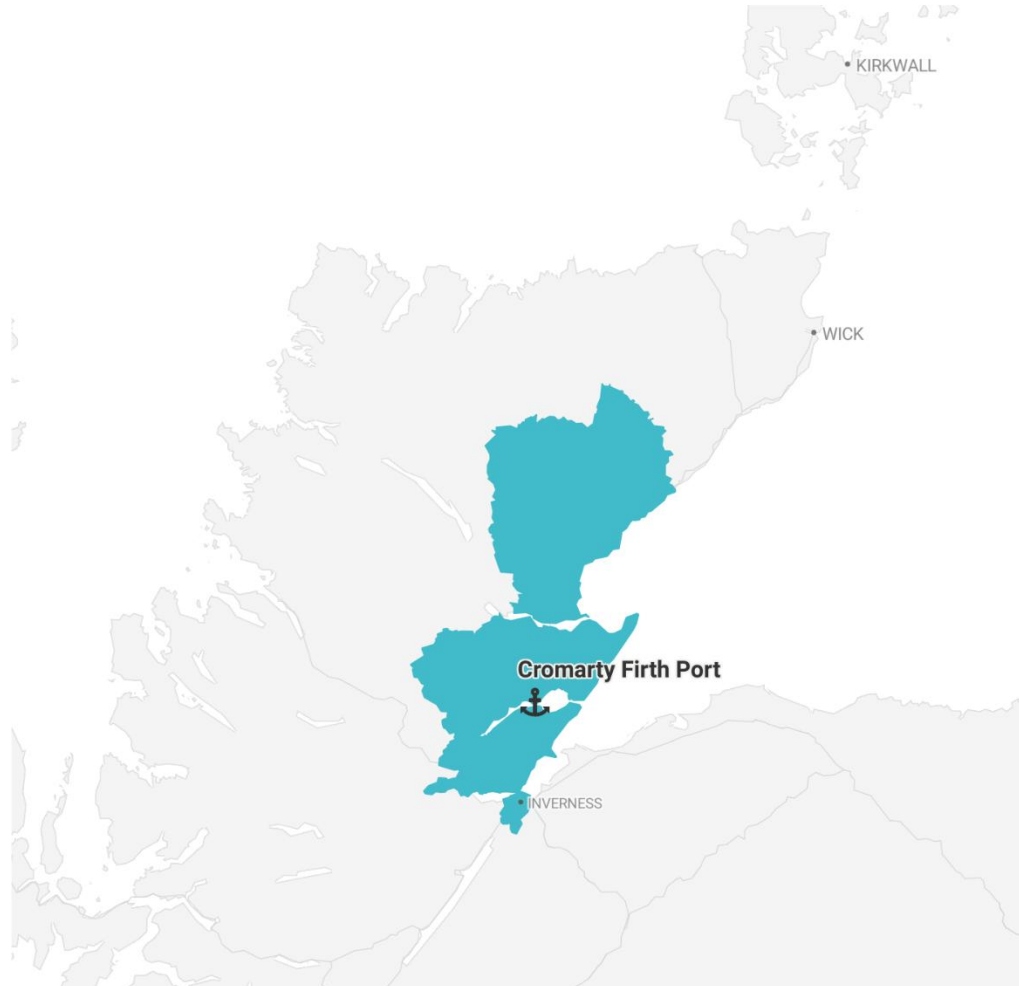


Figure 6.5: Cromarty Firth Port Local Socio-Economic Study Area

## 6.6 Dundee Port Local Socio-Economic Study Area

6.6.1.1 The Dundee Port Local Socio-Economic Study Area consists of the local authorities of Dundee City and Angus and the electoral wards of Carse of Gowrie; and Strathmore.



Figure 6.6: Dundee Port Local Socio-Economic Study Area

## 6.7 Fraserburgh Port Local Socio-Economic Study Area

6.7.1.1 The Fraserburgh Port Local Socio-Economic Study Area consists of the electoral wards of Bridge of Don; Central Buchan; East Garioch; Ellon and District; Fraserburgh and District; Inverurie and District; Mid Formartine; Peterhead North and Rattray; Peterhead South and Cruden; Troup; and Turriff and District.

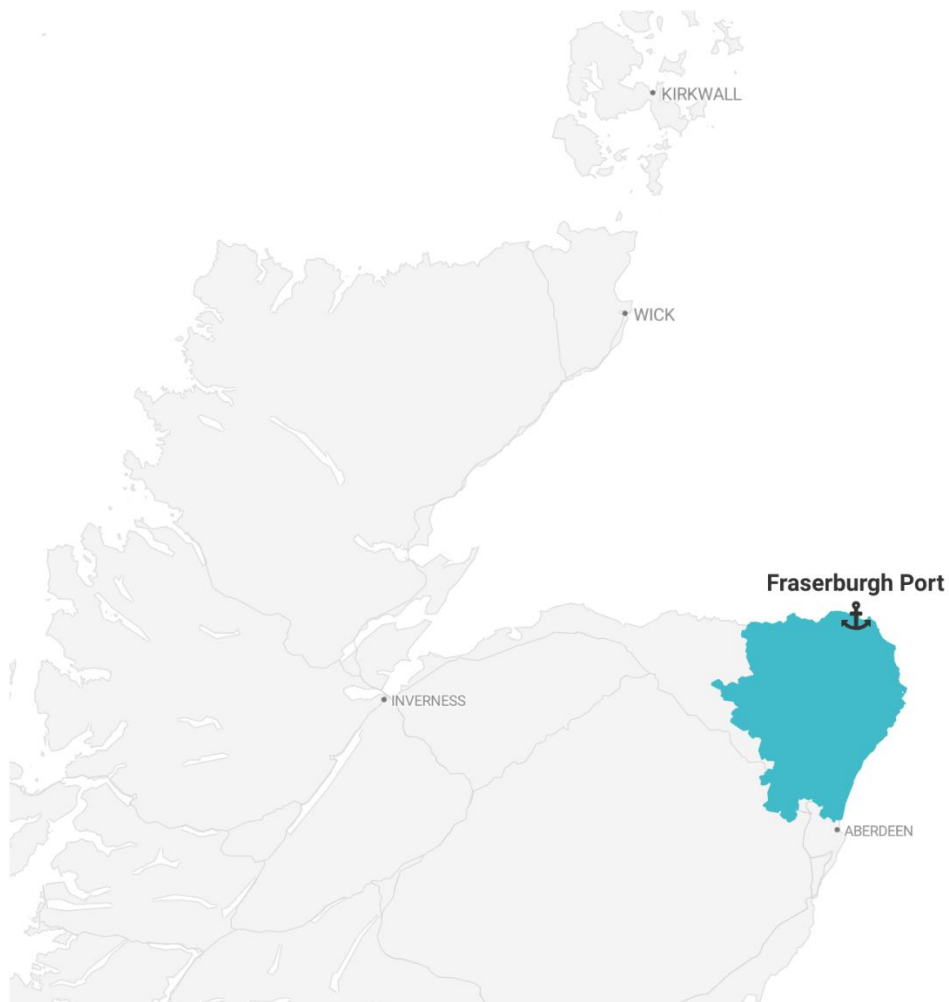


Figure 6.7: Fraserburgh Port Local Socio-Economic Study Area

## 6.8 Leith Port Local Socio-Economic Study Area

6.8.1.1 The Leith Port Local Socio-Economic Study Area consists of the local authority of the City of Edinburgh.



Figure 6.8: Leith Port Local Socio-Economic Study Area

## 6.9 Macduff Port Local Socio-Economic Study Area

6.9.1.1 The Macduff Port Local Socio-Economic Study Area consists of the electoral wards of Banff and District; Buckie; Central Buchan; Fochabers Lhanbryde; Fraserburgh and District; Huntly, Strathbogie and Howe of Alford; Keith and Cullen; Troup; and Turriff and District.



Figure 6.9: Macduff Port Local Socio-Economic Study Area

## 6.10 Methil Port Local Socio-Economic Study Area

6.10.1.1 The Methil Port Local Socio-Economic Study Area consists of the local authority of Fife.

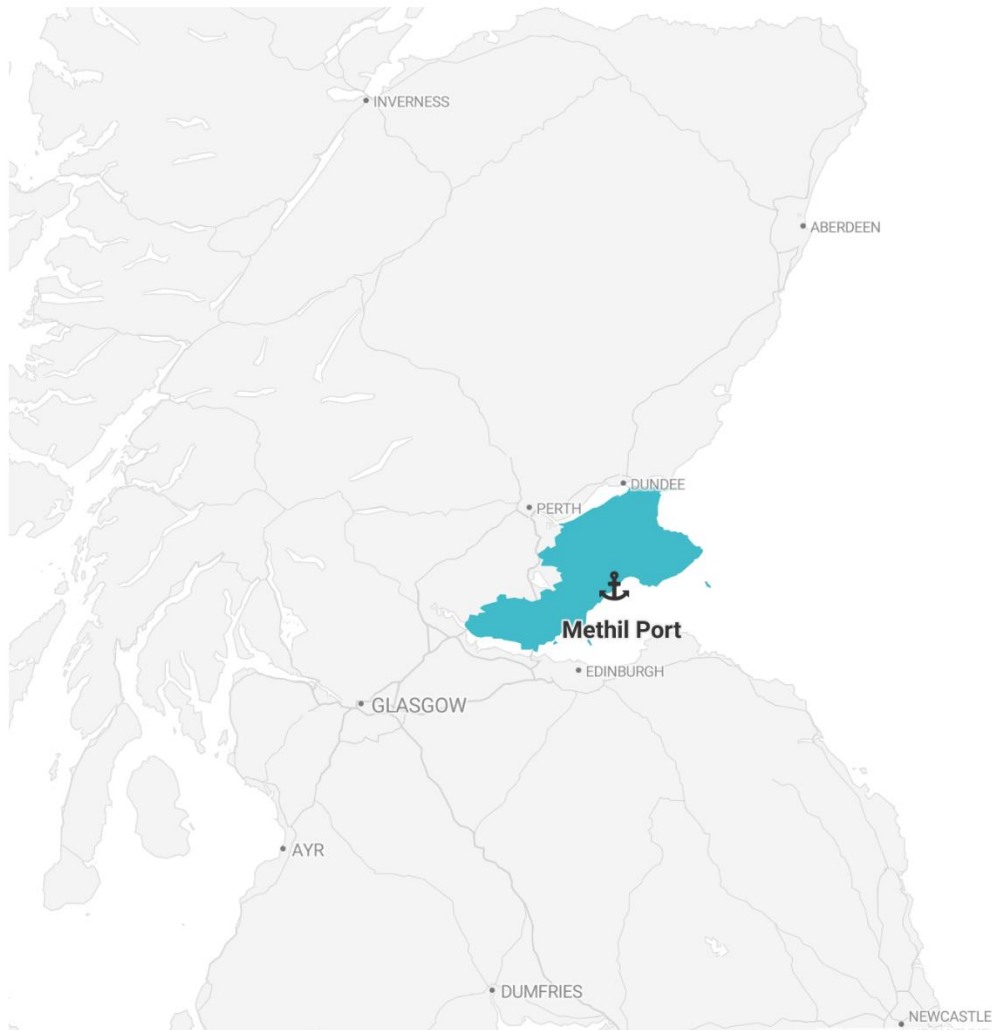


Figure 6.10: Methil Port Local Socio-Economic Study Area

## 6.11 Montrose Port Local Socio-Economic Study Area

6.11.1.1 The Montrose Port Local Socio-Economic Study Area consists of the electoral wards of Arbroath East and Lunan; Arbroath West, Letham and Friockheim; Brechin and Edzell; Carnoustie and District; Forfar and District; Kirriemuir and Dean; Mearns; and Montrose and District.



Figure 6.11: Montrose Port Local Socio-Economic Study Area

## 6.12 Nigg Port Local Socio-Economic Study Area

6.12.1.1 The Nigg Port Local Socio-Economic Study Area consists of the electoral wards of Aird and Loch Ness; Black Isle; Cromarty Firth; Dingwall and Seaforth; East Sutherland and Edderton; Inverness Central; Inverness Millburn; Inverness Ness-side; Inverness West; and Tain and Easter Ross.

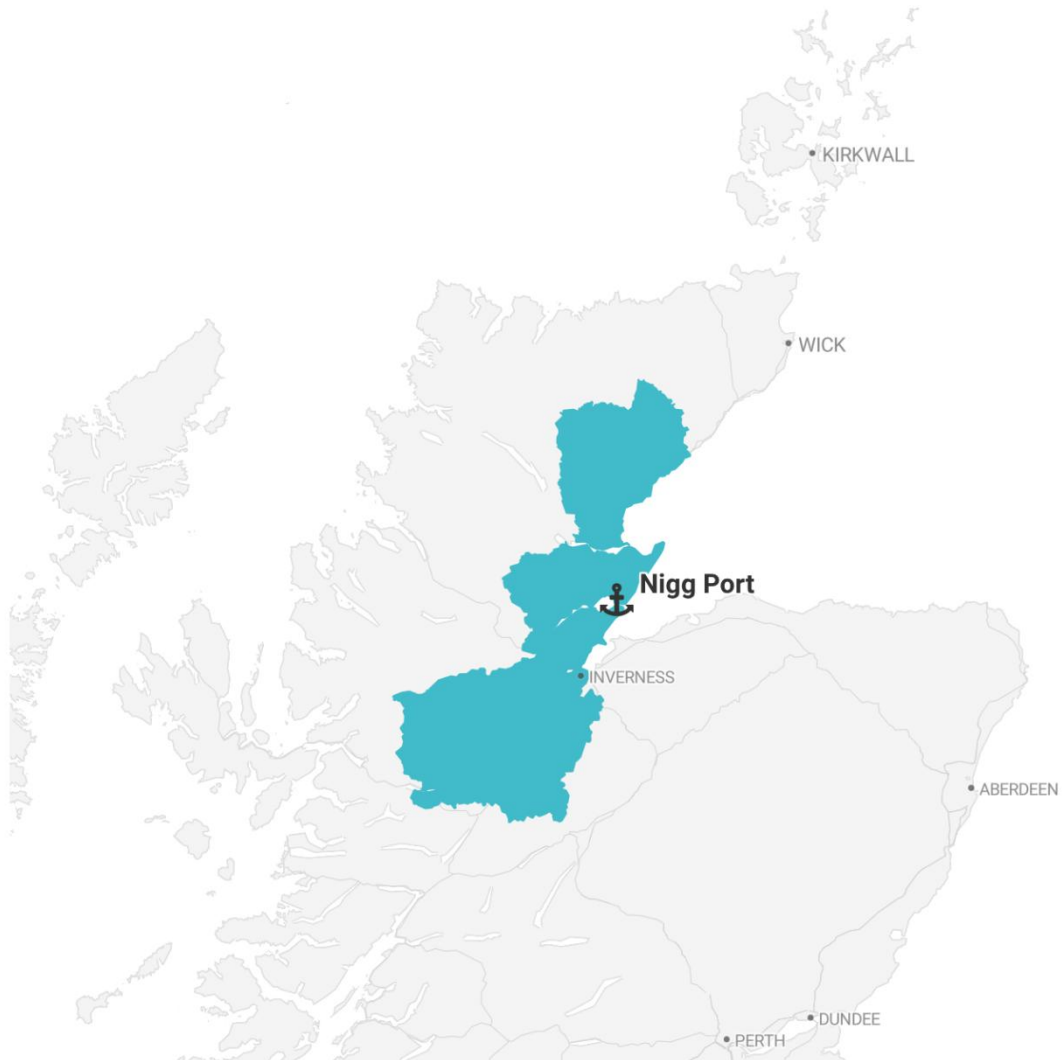


Figure 6.12: Nigg Port Local Socio-Economic Study Area

## 6.13 Peterhead Port Local Socio-Economic Study Area

6.13.1.1 The Fraserburgh Port Local Socio-Economic Study Area consists of the electoral wards of Bridge of Don; Central Buchan; East Garioch; Ellon and District; Fraserburgh and District; Inverurie and District; Mid Formartine; Peterhead North and Rattray; Peterhead South and Cruden; Troup; and Turriff and District.

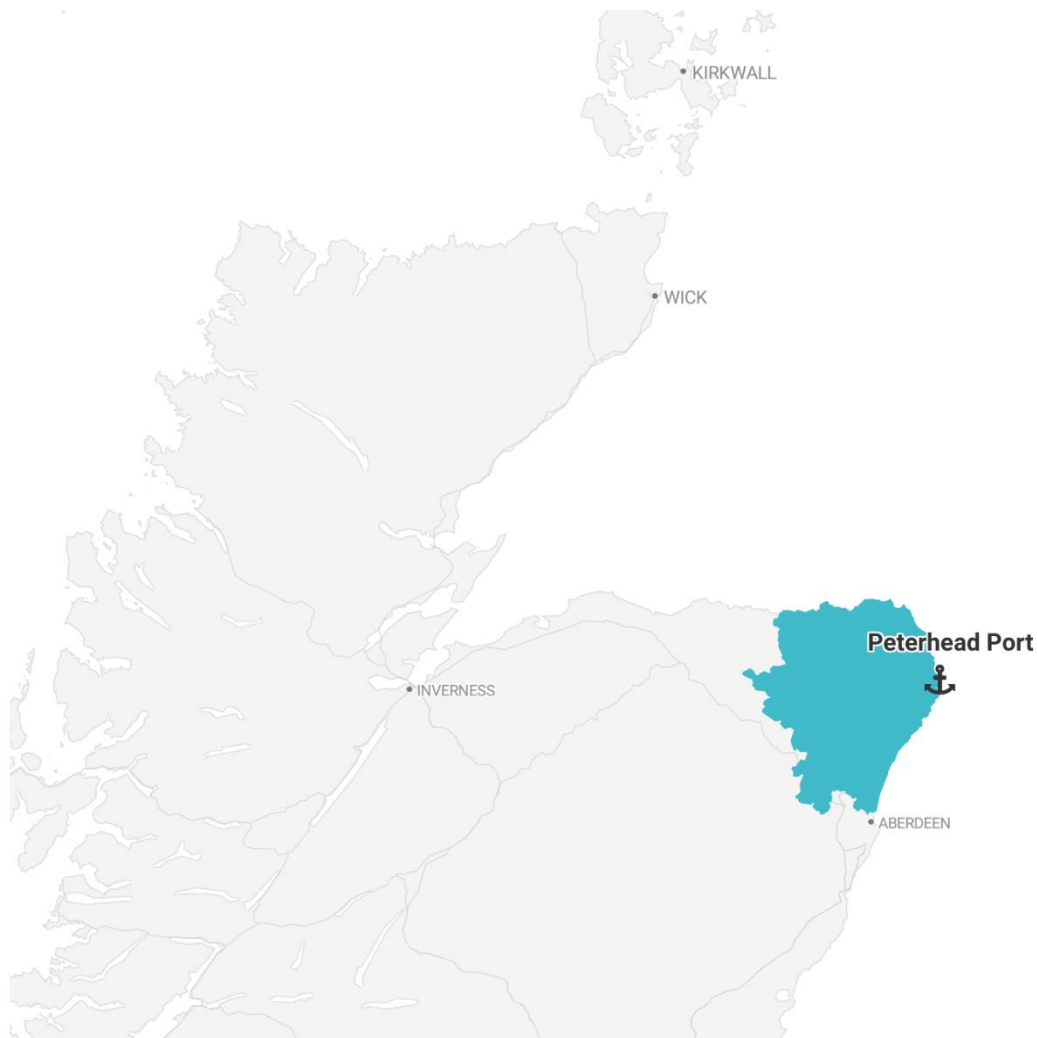


Figure 6.13: Peterhead Port Local Socio-Economic Study Area

## 6.14 Rosyth Port Local Socio-Economic Study Area

6.14.1.1 The Rosyth Port Local Socio-Economic Study Area consists of the electoral wards of Buckhaven, Methil and Wemyss Villages; Burntisland, Kinghorn and Western Kirkcaldy; Clackmannanshire East; Clackmannanshire South; Cowdenbeath; Cupar; Dunfermline Central; Dunfermline North; Dunfermline South; Glenrothes Central and Thornton; Glenrothes North, Leslie and Markinch; Glenrothes West and Kinglassie; Howe of Fife and Tay Coast; Inverkeithing and Dalgety Bay; Kirkcaldy Central; Kirkcaldy East; Kirkcaldy North; Leven, Kennoway and Largo; Lochgelly, Cardenden and Benarty; Rosyth; and West Fife and Coastal Villages.

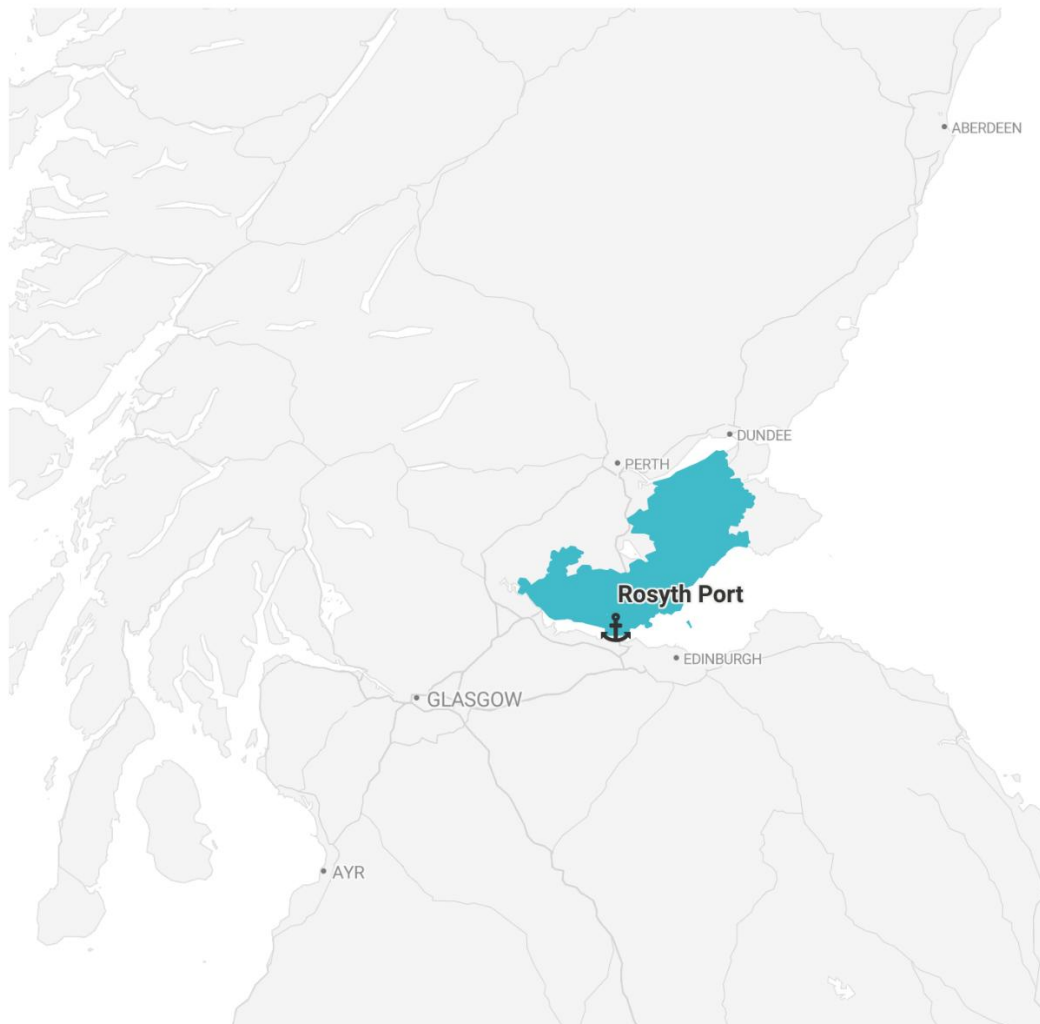


Figure 6.14: Rosyth Port Local Socio-Economic Study Area

## 6.15 Scapa Deep Water Quay Local Socio-Economic Study Area

6.15.1.1 The Scapa Deep Water Quay Local Socio-Economic Study Area consists of the local authority of the Orkney Islands.

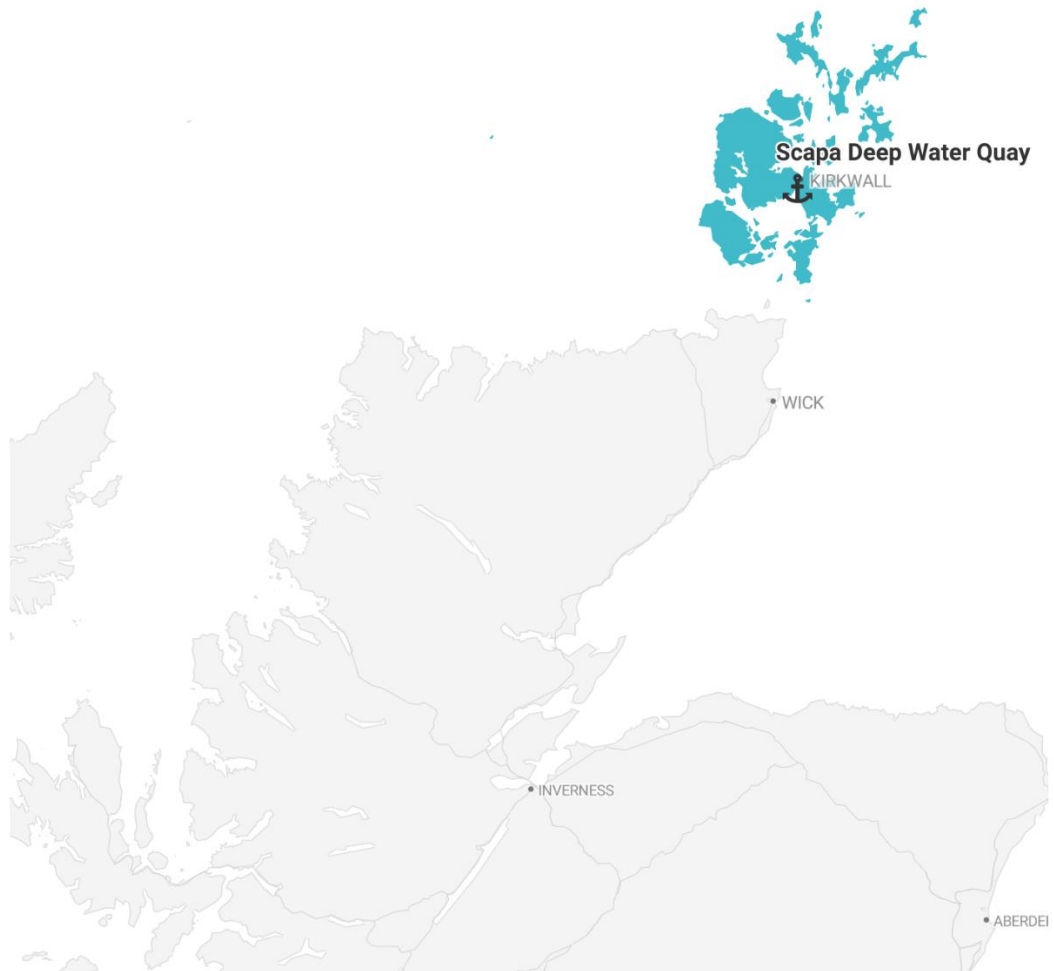


Figure 6.15: Scapa Deep Water Quay Local Socio-Economic Study Area

## 6.16 Wick Port Local Socio-Economic Study Area

6.16.1.1 The Wick Port Local Socio-Economic Study Area consists of the electoral wards of Thurso and Northwest Caithness; and Wick and East Caithness.

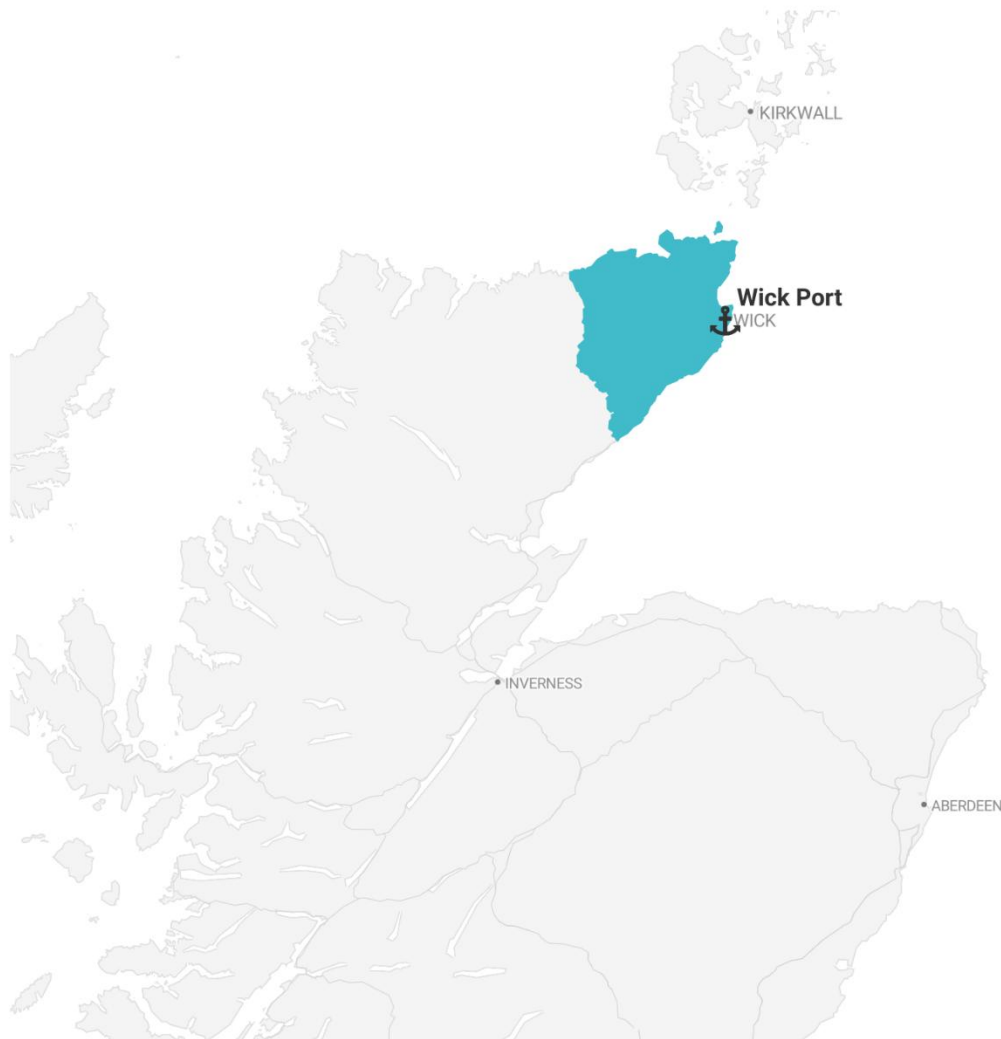


Figure 6.16: Wick Port Local Socio-Economic Study Area

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